

## Kentucky Health Information Exchange (KHIE)

# ePartnerViewer Enhancements – August 2021: Advisories and Manual Notes

User Guide

August 2021

Deloitte.



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## **Document Information**

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## **Table of Contents**

1	Introduction	5
2	Advisories	5
3	<b>Manual Notes</b> Adding a Note for a Patient Viewing a Note for a Patient	<b>7</b> 7
4	<b>Technical Support</b> Toll-Free Telephone Support Email Support	<b>12</b> 12 12



## **1** Introduction

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 and changes include:

- 1. **Notes Tab:** Feature that enables KHIE users to manually enter additional health information about a patient. Sharing notes about a patient could be beneficial in filling knowledge gaps in healthcare.
- 2. **'Alerts' Title changed to 'Advisories':** The new 'Alerts' feature was originally added to the ePartnerViewer in July, 2021. The name has since changed to 'Advisories' to distinguish it from Event Notifications that display for specific conditions.

### 2 Advisories

The **Alerts** feature has been renamed **Advisories**. The main purpose of the **Advisories** feature is to notify ePartnerViewer users of significant public health advisories that are in effect.

1. The Alerts feature on the **myDASHBOARD** screen has been changed to Advisories.

<b>KĤIE</b> e	PartnerViewer		Support 📢 Announcements 🛛 🔺	Advisories 1 🕘 Mitchell Cavallo -
Patient Search	Bookmarked Patients	Event Notifications	Lab Data Entry <del>-</del>	Case Report Entry <del>-</del>
😭 Home				
<b>▲ Advisory:</b> !@#\$%^&*()_+~	-0 0/`			<u>Read More   View All</u>

- 2. There are two options to view the **Advisories**:
  - Click the **Advisories Icon** in the Blue Navigation Bar at the top right.
  - **OR** click **View All** located on the right side of the *Advisory and Announcements* ribbon on the **myDASHBOARD** screen.

KĤIE   eP	artnerViewer		Support 📢 Announcements 8	Advisories 1 🕑 Mitchell Cavallo -
Patient Search	Bookmarked Patients	Event Notifications	Lab Data Entry -	Case Report Entry -
😭 Home				
<b>▲</b> Advisory: !@#\$%^&*()_+-{}	J <i>r</i> .			Read More View All
-		• • •		
<pre></pre>				
Please Note: The approximate of the approximate of the approximate of the second secon	e <i>Advisory and Annou</i> very 5 seconds.	<i>ncements</i> ribbon aut	omatically displays a c	lifferent advisory or





3. The Announcements & Advisories page displays.

KĤIE	ePartnerViewer			Support 📢 Announcements 2	🜲 Advisories 🚹 🛛 🕑 Mitchell Cavallo -
Patient Search	Bookmarked Patients	Event Notif	ications	Lab Data Entry 🕶	Case Report Entry ~
🖀 Home 🕨 Anne	ouncements & advisories				
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Provider /	Assistance Program deadline extension	Read More	<b>\$</b> !@#\$%^&*()	_+~{} []/`	Read More
📢 eHealth S	ummit	Read More			

4. To view the details of an Advisory, click **Read More** to the right of the *Advisory*.

<b>KĤIE</b>   eP	artnerViewer		🐸 Suj	port 📢 Announcements 2	🌲 Advisories 1	e Mitchell Cavallo -
Patient Search	Bookmarked Patients	Event Notifi	cations	Lab Data Entry -	Case	Report Entry -
Home > Announceme	nts & advisories					
	AN	NOUNCEMENT	S & ADVISORIES	;		
	ANNOUNCEMENTS <sup>2</sup>			ADVISORIES <sup>1</sup>		
Provider Assistance	Program deadline extension	Read More	!@#\$%^&*()_+~{}	Π/.		Read More
📢 eHealth Summit		Read More				

#### 5. The **Pop-Up** displays.

<b>KHIE</b>   ePartner	<pre>*Advisory × !@#\$%^&amp;*()_+~{} □\`</pre>	its 🗿 🌲 Advisories 🚺 🥹 Mitchell Cavalio ~
Patient Search British   Home Announcements & advisories     Announcements & advisories     Announcements & advisories     Announcements & advisories     Announcements & advisories	I@#\$%^&*()_+~()[])` snaler Bigger bold <i>italics</i> <u>underline</u> Orange Left This text is justified which means that the left and right edges will align in each row. This text is justified which means that the left and right edges will align in each row. This text is justified which means that the left and right edges will align in each row. This text is justified which means that the left and right edges will align in each row. • Bullets	Case Report Entry *
Copyright 2019 HealthInteractive	Indent Indent De-indent De-indent	Version: 1.0.0





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

<b>KHIE</b>   ePartner	* Advisory !@#\$%^&*()_+~{} []\`	ts 2 🔺 Advisories 1 🕒 Mitchell Cavallo *
Patient Search Br	!@#\$%^&*()_+-()  [\` <sup>Smaller</sup> Bigger <b>bold</b> <i>italics</i> <u>underline</u> Orange	Case Report Entry *
ANNOL	Left Center	S 🔍

### 3 Manual Notes

A new feature has been added that allows ePartnerViewer users to manually enter notes in a patient's record.

#### Adding a Note for a Patient

These steps cover how to add and view notes for a patient in the ePartnerViewer.

1. Open a Patient Record.

<b><i>(ĤIE</i></b>	ePartner	Viewer		2	Support 📢 Announce	ments 💈 🌲 Advisories	1 O Mitchell Cavalio -
Patient Search	h Book	marked Patients	Event No	tifications <mark>7</mark>	Lab Data Entry	- c	ase Report Entry 👻
🖀 Home 🔸 I	Patient search > BOBBY	BRADY					
51 years old	BRADY, BOBBY DOB Jul 12 1970	Sex	M Address	1234 TEST ST LEXINGTON	KY 40137	Bookmark	ed View More
DATE SELEC	TION Aug 05 2020 to Aug 04 2021	O 3 months	O 6 months	O 9 months	12 months O	Custom	₿ Retrieve
			ALERT: COVID	-19 Positive Patient			
Patient Summary	Medications & Allergies	<b>Clinical Documents</b>	Laboratory & Pathology	Reports Encounters	Immunizations l	Jncategorized Patient [	Demographics Notes
🐣 CLINICAL	. DOCUMENTS		ERS		Y	L RADIOLOGY	
DATE 🗸	NAME	START DATE 👻	DIAGNOSIS	COMPLETED DATE 👻	NAME	COMPLETED DATE 👻	NAME
08/04/2021	KHIE Summary CCD	08/04/2021	Pecked by Chicken	08/03/2021	SARS-CoV-2 (COVID	02/27/2021	RadTesting Imagin
08/04/2021	KHIE Medicaid CCD	08/04/2021	Pecked by Chicken	12/04/2020	SARS coronavirus 2	12/04/2020	XRAY CHEST 2 VIEW

#### 2. Click the **Notes** tab.

	ALERT: COVID-19 Positive Patient									
Patient Summary	Medications & Allergies	Clinical Documents	Laboratory & Pathology	Reports E	Encounters	Immunizations	Uncategorized	Patient Demographics	Notes	
👌 CLINICA	E CLINICAL DOCUMENTS		ENCOUNTERS					L RADIOLOGY		
DATE 🗸	NAME	START DATE 👻	DIAGNOSIS	COMPLETE	D DATE 👻 N	IAME	COMPLETED	DATE 🗸 NAME		
08/04/2021	KHIE Summary CCD	08/04/2021	Pecked by Chicken	08/03/2021	S	SARS-CoV-2 (COVID	02/27/2021	RadTesting Imag	in	
08/04/2021	KHIE Medicaid CCD	08/04/2021	Pecked by Chicken	12/04/2020	S	SARS coronavirus 2	12/04/2020	XRAY CHEST 2 VI	EW	





3. The **Notes** screen displays.

	DATE SELECTION		O 3 months	O 6 months	O 9 months	• 1	2 months	O Custom	C Retrieve	
	Showing Data for Aug 05 2020 to Aug 04 2021									
				ALERT: COVIE	)-19 Positive Pa	tient				
	Patient Summary	Medications & Allergies	Clinical Documents	Laboratory & Pathology	Reports	Encounters	Immunizations	Uncategorized	Patient Demographics	Notes
	Add	Note*								
	View									
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		<b>0/2500</b> Charac	ters							
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<u> </u>										_
	Please No	ote: The Note	es screen au	utomatically o	opens ir	the A	<b>dd</b> functio	onality. Th	ne <b>Add</b> notes	and
	<i>View</i> note	es options are	visible on th	ne left navigat	ion bar					
κ.					_					

4. Enter health **information about a patient** in the *Notes* field. The Notes functionality is intended to capture various health information ranging from documentation of care to determinants of health information. Users should understand that subjective information may be contributed in the Notes Section.

				ALERT: COVID-	9 Positive Pa	atient				
Patient Summary	Medications	& Allergies	Clinical Documents	Laboratory & Pathology	Reports	Encounters	Immunizations	Uncategorized	Patient Demographics	Notes
										- 1
Add		Note*								_
View		This is a te 12pt 20/2500 Chara	× B I ⊻ A	. ~ F F F E E ·	/ ∐ ~ ፸	Ē				
									Clear Save	
Please N included i Basic text	lote: Tl n the ch : editing	he <i>Not</i> naracte and fo	<i>tes</i> field has er limit. ormatting fu	a limit of 2,!	500 ch ailable	aracters	. Spaces <i>Votes</i> field	and punc	tuation marks	are





- 5. You should include your **User details** at the bottom of the *Notes* field after you've entered notes:
  - Date and Time
  - User Name
  - Organization Name
  - Role at Organization

				ALERT: COVID-	19 Positive P	atient				
Patient Summary	Medications	& Allergies	Clinical Documents	Laboratory & Pathology	Reports	Encounters	Immunizations	Uncategorized	Patient Demographics	Notes
Add		Need								<b>-</b> 1
View		This is a t	.est note.							
		12pt	~ B <i>I</i> <u>U</u> <u>A</u>		∕∃ ∕ ∈	Ā				
		20/2500 Chara	acters							_
									Clear Save	e

#### 6. Click **Clear** to remove all text from the *Notes field*.

			ALERT: COVID-1	9 Positive Pa	atient					
Patient Summary	Medications & Allergies	Clinical Documents	Laboratory & Pathology	Reports	Encounters	Immunizations	Uncategorized	Patient Demographics	Notes	
Add	Note*									
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	0/2500 Charao	tters								
								Clear Save		





7. Click **Save** to save your Notes.

			ALERT: COVID-	9 Positive Pa	atient				
Patient Summary	Medications & Allergies	Clinical Documents	Laboratory & Pathology	Reports	Encounters	Immunizations	Uncategorized	Patient Demographics	Notes
Add	Note*								
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	<b>20/2500</b> Char	acters							
								Clear Save	2

8. A **pop-up** displays. Click **OK** to close the pop-up.

onths	Add Notes	X IS	
	Patient note added successfully		
Document	5 Euporatory articleoopy heports Encounte	ОК	ations

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#### Viewing a Note for a Patient

In addition to adding notes for a patient, you can review the notes that other ePartnerViewer users have included in the patient chart.

1. Click **View** to see all the Notes entered for a patient.

Patient Summary Medications &	Allergies Clinical Documents	Laboratory & Pathology	Reports Encounters	Immunizations	Uncategorized Patient I	Demographics Note
Add View					C REFRESH	<b>T</b> APPLY FILTER
	SHOWING 9 ITEMS					
	NOTES	♦ USE	RNAME	\$	SUBMISSION DATE	\$
	This is a test note.	Mitc	nell, Cavallo		Aug 09 2021 22:19	

**Please Note**: The Notes functionality is intended to capture various health information ranging from documentation of care to determinants of health information. Users should understand that subjective information may be contributed in the Notes section.

#### 2. Click Apply Filter to display filters.

Patient Summary Medication	s & Allergies Clinical Documer	nts Laboratory & Pathology	Reports Encounters	Immunizations	Uncategorized Pat	ient Demographics Note
Add						
View						- AT LITTLE
	SHOWING 9 ITEMS					
	NOTES	♦ USER	NAME	¢ s	UBMISSION DATE	\$
	This is a test note.	Mitch	ell, Cavallo	A	Aug 09 2021 22:19	

#### 3. Enter **Keywords** in the *Notes* field to refine the search.

Patient Summary	Medications & Allergi	es Clinical Documents	Laboratory & Pat	hology	Reports	Encounters	Immunization	s Uncategorized	Patient Demographics	Notes
Add View										TER
	sноу 6 IT	MING EMS								
	NOT	TES test	÷	USER NA	<b>ME</b> Enter	User Name	¢	SUBMISSION DATE		<ul><li></li><li>✓</li></ul>
	This	is a test note.		Mitchell,	Cavallo			Aug 09 2021 22:19		





4. Enter a **Name** in the *User Name* field to filter for a specific user.

Patient Summary	Medications & Aller	gies Clinical Documents	Laboratory & Path	nology Reports	Encounters	Immunizations	uncategorized	Patient Demographics	Notes
Add							ŝ		TER
View	sHi 1 I	owing ITEMS							
	NC	Enter Notes	•	USER NAME Mi	ch	÷	SUBMISSION DATE		♦
	Th	is is a test note.		Mitchell, Cavallo			Aug 09 2021 22:19		
			First Ba	ck 1 Next	ast		Ma	ximum 5 👻 entries per	page

5. Select a **Date Range** from the *Submission Date Drop-down*.

atient Summary	Medications & Alle	ergies Clinical Documents	Laboratory & Pat	hology Rep	orts Encounters	Immunizations	s Uncategorized	Patient Demographics	Note
Add							a		TER
View									
	s g	DITEMS				_			
			•				SUBMISSION DATE		•
	N	Enter Notes	·	USER NAME	Enter User Name	ĭ	All		~
	Т	'his is a test note.	a test note.		illo		All Past 3 days		
	s	scenaro 3		luothi Tummala			Past 7 days		н
		scenaro s					Past 14 days		
	s	scenario 2		Jyothi, Tumm	ala	L	. Past 30 days		
	s	cenario 1		Jyothi, Tumm	ala		Jul 29 2021 16:49		

## 4 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 <u>KHIESupport@ky.gov</u>.