

# Kentucky Health Information Exchange (KHIE)

# ePartnerViewer Enhancements – August 2021: Advisories and Manual Notes

User Guide

August 2021



#### **Copyright Notice**

© 2020 Deloitte. All rights reserved.

#### Trademarks

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

#### Illustrations

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

#### Deloitte

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



## **Document Control Information**

## **Document Information**

Document Name	ePartnerViewer Enhancements - August 2021: Advisories and Manual Notes User Guide
Project Name	KHIE
Client	Kentucky Health Information Exchange
Document Author	Deloitte Consulting
Document Version	2.0
Document Status	Draft
Date Released	08/13/2021

## **Document Edit History**

Version	Date	Additions/Modifications	Prepared/Revised by
1.0	08/09/2021	Initial Draft	Deloitte Consulting
1.1	08/11/2021	Revised Draft	KHIE
1.2	08/11/2021	Revised Draft	Deloitte Consulting
1.3	08/13/2021	Revised Draft	KHIE
2.0	08/13/2021	Revised Draft	Deloitte Consulting
	07/29/2024	Updated KHIE Phone Number	Charlese Blair KHIE





# **Table of Contents**

1	Introduction	5
	Advisories	
3	Manual Notes	7
	Adding a Note for a Patient	
	Viewing a Note for a Patient	12
4	Technical Support	13
	Toll-Free Telephone Support	13
	Email Support	



## **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.

KÎLE   el	PartnerViewer		Support 📢 Announcements 2	Advisories 1 🕘 Mitchell Cavallo -
Patient Search Bookmarked Patients		Event Notifications	Lab Data Entry <del>-</del>	Case Report Entry -
A Home				
<b>▲</b> Advisory: !@#\$%^&*()_+~{	3 0/,			Read More   View All

- 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.

KÎLE   ePa	artnerViewer		Support 📢 Announcements 2	Advisories 1 O Mitchell Cavallo -
Patient Search	Bookmarked Patients	Event Notifications	Lab Data Entry +	Case Report Entry -
A Home				
<b>▲</b> Advisory: !@#\$%^&*()_+-{} []	ζ.			Read More View All
		• • •		
or announcemer	e Advisory and Annour	<i>icements</i> ribbon aut	omatically displays a	a different advisory



3. The Announcements & Advisories page displays.

KÎLIE	ePartnerViewer			Support 📢 Announcements 2	Advisories 1 S Mitchell Cavall	lo <del>-</del>
Patient Search	Bookmarked Patients	Event Notif	ications	Lab Data Entry -	Case Report Entry •	
🖀 Home 🕨 Anne	ouncements & advisories					
	A	NNOUNCEMENT	S & ADVISO	DRIES		
	ANNOUNCEMENTS 2			Advisories		
📢 Provider /	Assistance Program deadline extension	Read More	<b>.</b> !@#\$%^&	*()_+~{}   []/`	Read More	
📢 eHealth S	iummit	Read More				

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

KĤII	ePartnerViewer			⊠ Support	📢 Announcements 2	🐥 Advisories 1	😫 Mitchell Cavallo -			
Patient S		Event Notifi	ications	Lab Data Entry -		Case	Report Entry -			
🖌 Home	Home > Announcements & advisories									
		ANNOUNCEMENT	S & ADVISC	ORIES						
				Advisories <sup>1</sup>						
<b>€1</b> P	rovider Assistance Program deadline extension	Read More	<b>↓</b> !@#\$%^& <sup>;</sup>	*()_+~{} []\`		C	Read More			
<b>K</b> e	Health Summit	Read More								

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

## ePartnerViewer Enhancements – August 2021: Advisories and Manual Notes



<b>KHIE</b>   ePartner	Advisory × !@#\$%^&*()_+~{ □\`	nts 💈 🌲 Advisories 🚹 🤤 Mitchell Cavallo -
Patient Search Bo	!@#\$96^&*0_+~0   []\`	Case Report Entry *
Home > Announcements & advisorie	Smiller Bigger bold italics underline Orange	
ANNOL	Left Center Richt	9
Provider Assistance Program dead	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	Read More
eHealth Summit	left and right edges will align in each row. • Bullets	
	1. Numeric Indent	
	Indent Indent De-indent De-indent	
Copyright 2019 HealthInteractive		Version: 1.0.0

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

<b>KHIE</b>   ePartner	Advisory !@#\$%^&*()_+~{}□\`	× Its	2 🌲 Advisories 1 🕒 Mitchell Cavallo *
Patient Search E	!@#\$%^&*()_+−{} [\`		Case Report Entry -
🖀 Home 🕨 Announcements & advisorie	smaller Bigger		
	bold italics	_	
	underline		
	Orange		
ANNO	Left Center	S 1	

## 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.

## ePartnerViewer Enhancements – August 2021: Advisories and Manual Notes



<b>(ĤIE</b>	ePartner	Viewer			🕿 Support 📢 Announce	ements 😢 🌲 Advisorie	es 1 😫 Mitchell Cavallo
Patient Searc	h Bool	marked Patients	Event N	lotifications 2	Lab Data Entry	/ <del>-</del>	Case Report Entry -
😭 Home 🔸	Patient search > BOBBY	BRADY					
51 years old	BRADY, BOBBY DOB Jul 12 1970		M Addres	s 1234 TEST ST LEXINGT	ON KY 40137	Bookm	arked View More
DATE SELEC	Aug 05 2020 to Aug 04 2021	O 3 months	O 6 months	O 9 months	• 12 months C	Custom	₿ Retrieve
			ALERT: COVI	D-19 Positive Patient			
Patient Summary	Medications & Allergies	Clinical Documents	Laboratory & Patholog	y Reports Encoun	ters Immunizations	Uncategorized Patier	nt Demographics Notes
🗟 CLINICAL	. DOCUMENTS	ENCOUNT	ERS	上 LABORAT	ORY	L RADIOLOG	Y
DATE 🗸	NAME	START DATE 👻	DIAGNOSIS	COMPLETED DATE	→ NAME	COMPLETED DATE	<ul> <li>NAME</li> </ul>
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 Encounte	rs Immunizations	Uncategorized	Patient Demographics Notes	
LINICAL DOCUMENTS		ENCOUNT						
DATE 🗸	NAME	START DATE 👻	DIAGNOSIS	COMPLETED DATE	- NAME	COMPLETED I	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	

#### 3. The **Notes** screen displays.

DATE SELECTI	ON	O 3 months	○ 6 months	O 9 months	• 12 months	O Custom	C Retrieve			
Showing Data for Aug	g 05 2020 to Aug 04 2021									
ALERT: COVID-19 Positive Patient										
Patient Summary	Medications & Allergies	Clinical Documents	Laboratory & Pathology	y Reports Enco	unters Immunizations	Uncategorized	Patient Demographics	Notes		
Add	Note*									
View										
	12pt	✓ B I U A	~ = = = = =	×≣ × ≣ ≥						
	0/2500 Charac	ters								
							Clear Save			



**Please Note:** The *Notes* screen automatically opens in the **Add** functionality. The **Add** notes and **View** notes options are visible on the left navigation bar.

\_\_\_\_

\_ \_ \_ \_ \_ \_ \_ \_ \_ \_

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
Add View	Note* This is a t		.~ = = = = := \	∕ ⊞ ≻ ⊡	垣				
	20/2500 Char	acters						Clear Save	2
included	in the charac	ter limit.	a limit of 2,50 unctions are			·	·	uation mark	s 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



## ePartnerViewer Enhancements – August 2021: Advisories and Manual Notes



				ALERT: COVID-1	9 Positive P	atient				
Patient Summary	Medications &	Allergies	Clinical Documents	Laboratory & Pathology	Reports	Encounters	Immunizations	Uncategorized	Patient Demographics	Notes
Add										-
View		<b>lote*</b> This is a tes	it note.							
		12pt		~ F F F F E E :		=				_
		0/2500 Charact			1					
										_
									Clear Save	•

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

			ALERT: COVID-	19 Positive Pa	atient				
Patient Summary	Medications & Allergies	<b>Clinical Documents</b>	Laboratory & Pathology	Reports	Encounters	Immunizations	Uncategorized	Patient Demographics	Note
Add	Note*								
View									
	12pt	× B <i>I</i> ⊻ <u>A</u>	.~ = = = = :: `	1≣ ~ ≡	ž				
	0/2500 Charad	ters							
								Clear Save	•





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

			ALERT: COVID-	19 Positive Pa	atient				
Patient Summary	Medications & Allergies	<b>Clinical Documents</b>	Laboratory & Pathology	Reports	Encounters	Immunizations	Uncategorized	Patient Demographics	Notes
Add	Note*								
View	This is a t	est note.							
	12pt		. ✓ ₣ ₹ ₹ ≣ ⊞ \	≣∽≣	ž				
	20/2500 Char	acters							
								Clear Save	2

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

onths	Add Notes	×	าร
	Patient note added successfully		
Document		ОК	nizations





#### 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 8	Allergies Clinical Documents La	boratory & Pathology Repo	rts Encounters Immunization	s Uncategorized Patient	Demographics Notes
Add View				€ REFRESH	<b>T</b> APPLY FILTER
	SHOWING 9 ITEMS				
	NOTES	USER NAME	\$	SUBMISSION DATE	\$
	This is a test note.	Mitchell, Caval	0	Aug 09 2021 22:19	
from documentat	e Notes functionalit tion of care to dete formation may be c	erminants of h	ealth information	n. Users should	

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

Patient Summary	Medications & Allergies	Clinical Documents	Laboratory & Path	ology Reports	Encounters	Immunizations	Uncategorized	Patient Demographics	Notes
Add							g	REFRESH TAPPLY FILTE	R
View									
	SHOWING 9 ITEMS								
	NOTES		\$	USER NAME		¢ _	SUBMISSION DATE	:	¢
	This is a	test note.		Mitchell, Cavallo		A	Aug 09 2021 22:19		

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

Patient Summary	Medications & Allergies	Clinical Documents L	aboratory & Pat	hology	Reports	Encounters	Immunization	5 Uncategorized	Patient Demographics	Notes
Add View								Ê		TER
	SHOWING 6 ITEMS	;								
	NOTES	test	•	USER NAM	<b>ME</b> Enter	User Name	¢	SUBMISSION DATE		¢ ~
	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	& Allergies	Clinical Documents	Laboratory & Pat	hology	Reports	Encounters	Immunization	s Uncategorized	Patient Demographics	Notes
Add											TER
View		showing 1 ITEMS									
		NOTES	Enter Notes	-	USER NAM	ME Mitch		•	SUBMISSION DATE		•
		This is a	est note.		Mitchell, (	Cavallo		_	Aug 09 2021 22:19		
				First Ba	ack 1 M	Vext Las	t		Ma	aximum 5 🔹 entries per	page

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

Patient Summary	Medications & Allergies	Clinical Documents	Laboratory & Patholo	ogy Repor	ts Encounters	Immunizations	s Uncategorized	Patient Demographics	Notes
Add View							ŕ		TER
	9 ITEMS	Enter Notes	¢ Us		nter User Name	[	SUBMISSION DATE		¢
	This is a	test note.	M	tchell, Cavall	0		All Past 3 days		
	scenaro		~	othi, Tummal othi, Tummal			Past 7 days Past 14 days Past 30 days		
	scenario	1	Јус	othi, Tummal	3		Jul 29 2021 16:49		

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