

# Kentucky Health Information Exchange (KHIE)

## **ePartnerViewer**

## User Guide

July 2021

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## Document Control Information

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# 1 Introduction

## Overview

The Kentucky Health Information Exchange (KHIE) utilizes the Kentucky Online Gateway (KOG) to authenticate if an individual is part of an organization that has access to review patient health information in KHIE. To access KHIE, Authorized Users must establish a KOG account.

This document provides Kentucky Health Information Exchange (KHIE) authorized users with an introduction to KHIE's clinical portal, the ePartnerViewer. The ePartnerViewer offers a single location where patient health information is aggregated from all KHIE Participants and is presented in a read-only view. Users have the option to customize the display of patient data in a functional and easy-to-use format that works best for them.

**The data available in the ePartnerViewer includes:**

Data Type	Contents
Patient Summary	<ul style="list-style-type: none"><li>• Patient <b>at-a-glance</b> view of the most recent clinical information</li></ul>
Medications & Allergies	<ul style="list-style-type: none"><li>• Medications</li><li>• Medication &amp; Non-Medication Allergies</li></ul>
Clinical Documents	<ul style="list-style-type: none"><li>• Continuity of Care Documents (CCDs)</li><li>• KHIE Summary CCD</li><li>• Medicaid CCD</li><li>• Prescription Drug Monitoring Program (PDMP)</li><li>• Other Documents</li></ul>
Laboratory & Pathology	<ul style="list-style-type: none"><li>• Laboratory Results</li><li>• Pathology Results</li></ul>
Reports	<ul style="list-style-type: none"><li>• Radiology Reports</li><li>• Other Transcribed Reports</li><li>• Images</li></ul>
Encounters	<ul style="list-style-type: none"><li>• Clinical Encounters</li><li>• Problems</li><li>• Procedure History</li></ul>
Immunizations	<ul style="list-style-type: none"><li>• Immunization History</li></ul>
Uncategorized	A result report that has not been designated as a particular type of result. Undesignated laboratory, pathology, and radiology reports may appear here.
Patient Demographics	Demographic data based on MRN number, such as next of kin, visit information, insurance, sending facility, extreme drug resistant organism (XDRO) status

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.

## Supported Web Browsers

Users must access the ePartnerViewer with a supported web browser. The ePartnerViewer is configured to support the following modern browsers on desktop, tablet, and mobile devices:

Desktop Browser Version	Mobile Browser Version
<b>Microsoft Edge</b>	
Version 44+	Version 40+
<b>Google Chrome</b>	
Version 70+	Version 70+
<b>Mozilla Firefox</b>	
Version 48+	Version 48+
<b>Apple Safari</b>	
Version 9+	iOS 11+

**Please Note:** The ePartnerViewer does not support Microsoft Internet Explorer. To access the ePartnerViewer, Users must use a modern browser such as Google Chrome, Microsoft Edge, Apple Safari, or Mozilla Firefox.

## Mobile Device Considerations

The ePartnerViewer is based on responsive design. This means it renders in the best format based on the user's device size. Responsive design applies to mobile, tablet, and desktop devices. Tablet devices in landscape display mode are considered desktop.

## 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.
  - a. Details on creating a KOG account are in *Section 2 KOG Registration and Login* of this guide.
3. Users are required to complete Multi-Factor Authentication (MFA).
  - a. Details on MFA are included in the *Multi-Factor Authentication (MFA)* subsection in *Section 2 KOG Registration and Login* of this guide.

## 2 ePartnerViewer Roles

### Overview of Clinical User Roles

The ePartnerViewer provides access to different functions depending on the roles that have been provisioned. All Clinical User Roles have been authorized by a KHIE Participant Organization to access patient's clinical data in KHIE's ePartnerViewer. The specific clinical role designations are for reporting purposes.

#### Clinical User Roles for the ePartnerViewer:

1	Physician	7	Infection Control Clinician
2	Physician Assistant	8	Other Healthcare Clinician
3	Pharmacist	9	Health Records Administrator
4	Nurse Practitioner	10	Epidemiologist
5	Nurse	11	Care / Case Manager
6	Paramedic		

#### Description of Clinical User Roles for the ePartnerViewer:

- An Organization may have multiple Clinical User Roles (Users).
- Clinical Users may add and manage patients to receive event notifications.
- Clinical Users have access to all clinical data available on a patient.
  - **Please Note:** When there is a PDMP report available on a patient, only users with KASPER authorization will be able to view that report in the ePartnerViewer.
- Clinical Users may also have any of the following roles:
  - Event Notification Admin
  - KHIE Organization Admin
  - Manual Data Submission
  - PACS Administrator
    - Requires a Clinical role to access the images
  - Access Admin
  - Manual Case Reporter
- Clinical Users may have the *same Clinical role* in two different organizations.
  - Example: John Doe may be a Physician at Hospital A and a Physician at Hospital B.

- Clinical Users **cannot** have *two different Clinical roles* in the same organization.
  - Example: John Doe cannot be a Physician AND a Paramedic at Hospital A.
- Clinical Users **cannot** have *two different Clinical roles* in two different organizations.
  - Example: John Doe cannot be a Physician at Hospital B and a Paramedic at Hospital B.

## Overview of Additional User Roles

The following roles are considered non-clinical access roles. Depending on the needs of the organization, Users can have one of the Clinical roles AND any or all of the non-clinical roles.

- Example: John Doe may be both a Physician AND an Event Notification Administrator.

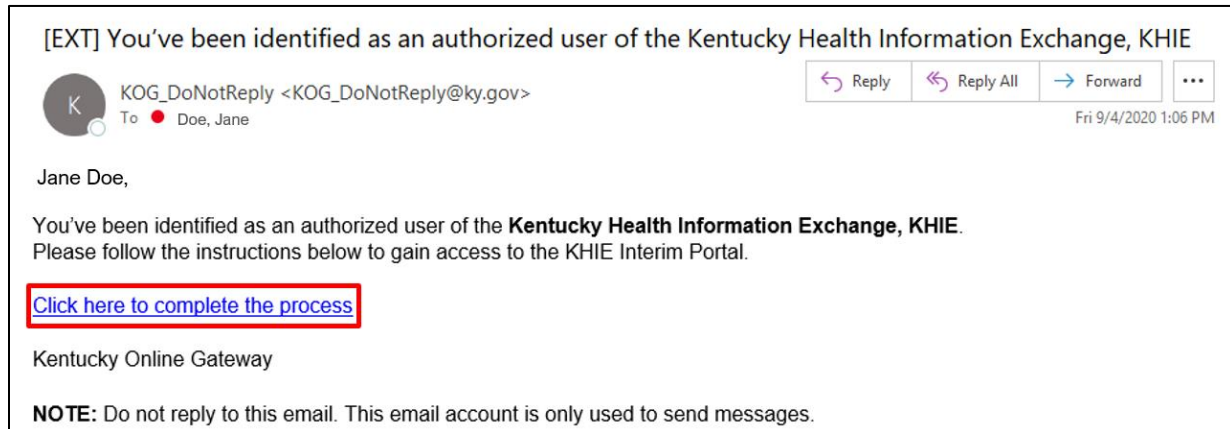
### Additional Roles for the ePartnerViewer:

<b>Event Notification Administrator</b>	User who has been authorized by an Organization to manage their event notifications within the ePartnerViewer.
<b>KHIE Organization Administrator</b>	User who has been authorized by an Organization to manage their authorized users.
<b>Manual Data Submission</b>	User who has been authorized by an Organization to manually enter certain reportable laboratory results in the ePartnerViewer.
<b>Access Administrator</b>	User who has been authorized by an Organization to review records of their authorized Clinical Users who use the 'break the glass' functionality to view a patient's chart in the ePartnerViewer.
<b>PACS Administrator</b>	User who has been authorized by an Organization to export radiology images to a local Picture Archiving and Communications System (PACS).
<b>Manual Case Reporter</b>	User who has been authorized by an Organization to manually enter case reports for communicable disease reporting.

### 3 KOG Registration and Login

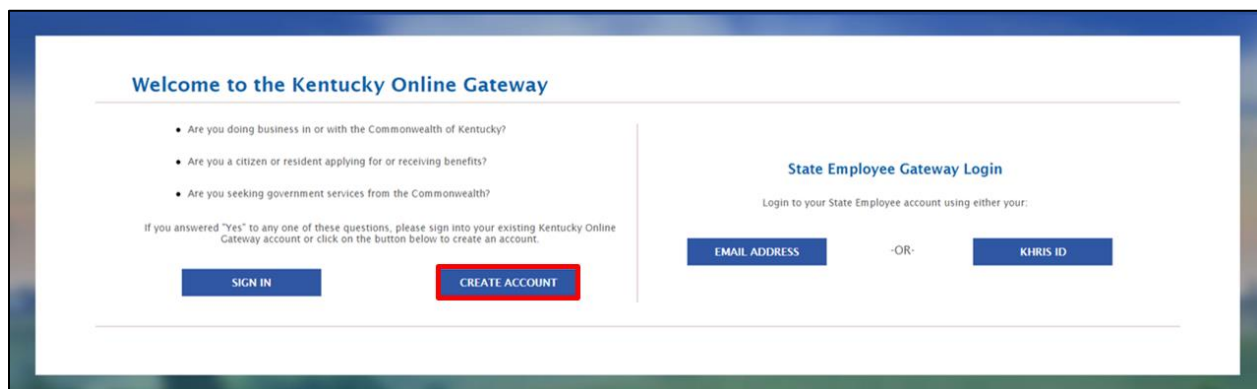
#### Create a KOG Account

1. When provisioned with a user role in the ePartnerViewer, you will receive an invitation email to register for the Kentucky Online Gateway (KOG).
2. To register, click the **Click here to Complete the Process** hyperlink in the Invitation email to be directed to the **Kentucky Online Gateway Registration Page**.



**Please Note:** This link is active for seven days. The registration link is only valid for a one-time use. If you click the link and do not complete the registration process, a new link must be sent. If the link expires, the KHIE Org Admin must send another invitation to create a Kentucky Online Gateway (KOG) account.

3. The **KOG Landing Page** displays. If you do not have an existing KOG account, click **Create Account**.



**Please Note:** If you already have an existing KOG account with the same email address from which you received the invitation to enroll, do not create a new account. Log into KOG using your existing credentials.

4. Enter Registration Information. Mandatory fields are marked with asterisks (\*).
5. Enter **First Name**.
6. Enter **Last Name**.
7. Enter **Email Address**.

**Please complete your Kentucky Online Gateway Profile**

❗ If you already have an existing Kentucky Online Gateway (KOG) Account, please click [here](#) to reset your password OR click on the CANCEL button below to log into your account.

Please fill out the form below and click **Sign Up** when finished.  
All fields with \* are required.

* First Name	Middle Name	* Last Name
<input type="text"/>	<input type="text"/>	<input type="text"/>
* E-Mail Address	* Verify E-Mail Address	
<input type="text"/>	<input type="text"/>	
* Password	* Verify Password	
<input type="text"/>	<input type="text"/>	
Mobile Phone	Language Preference	
<input type="text"/>	English <input type="button" value="v"/>	

**Please Note:** You MUST register using the same email address from which you received the invitation to enroll.

8. Confirm **Email Address**.
9. Enter **Password**.
10. Confirm **Password**.
11. Enter **Street Address, City, State, and Zip Code**.
12. Enter **Answer** to Security Question 1.
13. Enter **Answer** to Security Question 2.

Mobile Phone	Language Preference	
<input type="text"/>	English <input type="button" value="v"/>	
Street Address 1	Street Address 2	
<input type="text"/>	<input type="text"/>	
City	State	Zip Code
<input type="text"/>	<input type="button" value="v"/>	<input type="text"/>
Question	* Answer	
In what city were you born? (Enter full name of city only)	<input type="text"/>	
Question	* Answer	
What was the name of your first pet?	<input type="text"/>	
<input type="button" value="CANCEL"/>		<input type="button" value="SIGN UP"/>

14. After completing the mandatory fields, click **Sign Up**.

**Please complete your Kentucky Online Gateway Profile**

1 If you already have an existing Kentucky Online Gateway (KOG) Account, please click [here](#) to reset your password OR click on the CANCEL button below to log into your account.

Please fill out the form below and click **Sign Up** when finished.  
All fields with \* are required.

* First Name	Middle Name	* Last Name
<input type="text" value="Jane"/>	<input type="text" value="L"/>	<input type="text" value="Doe"/>
* E-Mail Address	* Verify E-Mail Address	
<input type="text" value="jane.doe@gmail.com"/>	<input type="text" value="jane.doe@gmail.com"/>	
* Password	* Verify Password	
<input type="password" value="....."/>	<input type="password" value="....."/>	
Mobile Phone	Language Preference	
<input type="text" value="(999) 999-9999"/>	<input type="text" value="English"/>	
Street Address 1	Street Address 2	
<input type="text" value="11 Mill Creek Park"/>	<input type="text"/>	
City	State	Zip Code
<input type="text" value="Frankfort"/>	<input type="text" value="Kentucky"/>	<input type="text" value="40501"/>
Question	* Answer	
<input type="text" value="In what city were you born? (Enter full name of city only)"/>	<input type="text" value="Frankfort"/>	
Question	* Answer	
<input type="text" value="What was the name of your first pet?"/>	<input type="text" value="Fido"/>	

**CANCEL SIGN UP**

15. After clicking **Sign Up**, you'll be directed to a screen displaying the following message: *Your account has been requested and is pending email verification. Please check your email and click on the link provided to verify your account.*

16. You must check your email to complete the KOG Account Validation process.

**MYKY**  
MyKentucky.gov

FAQ | Help | English

**Please complete your Kentucky Online Gateway Profile**

**YOU HAVE 4 HOURS TO COMPLETE THE PROCESS**

Your account has been requested and is pending email verification. Please check your email and click on the link provided to verify your account. If you do not see the verification email in your inbox, please check your spam or junk folder. If no email was received [click here](#).

If you have already verified your account by clicking the link provided in the email, please click on **SIGN IN** button to continue.

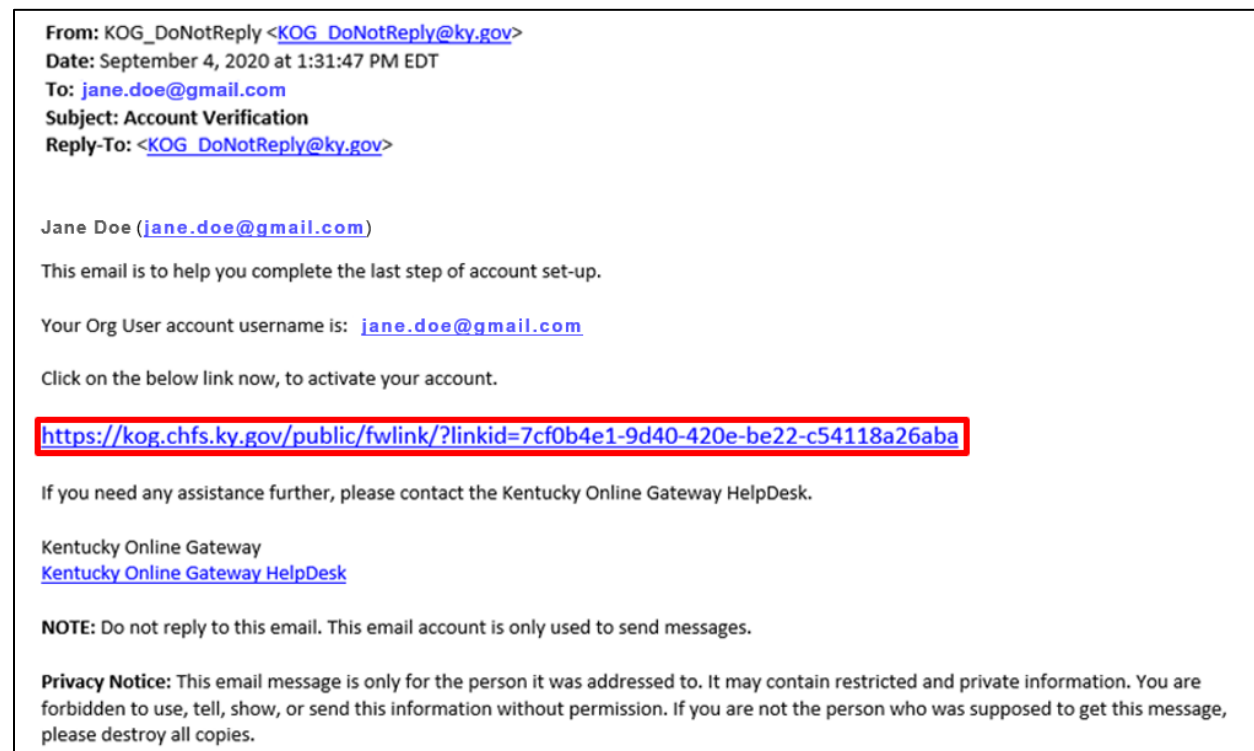
**SIGN IN**

**Please Note:** If the verification email is not in the inbox, check the *Junk* and *Spam* folders.

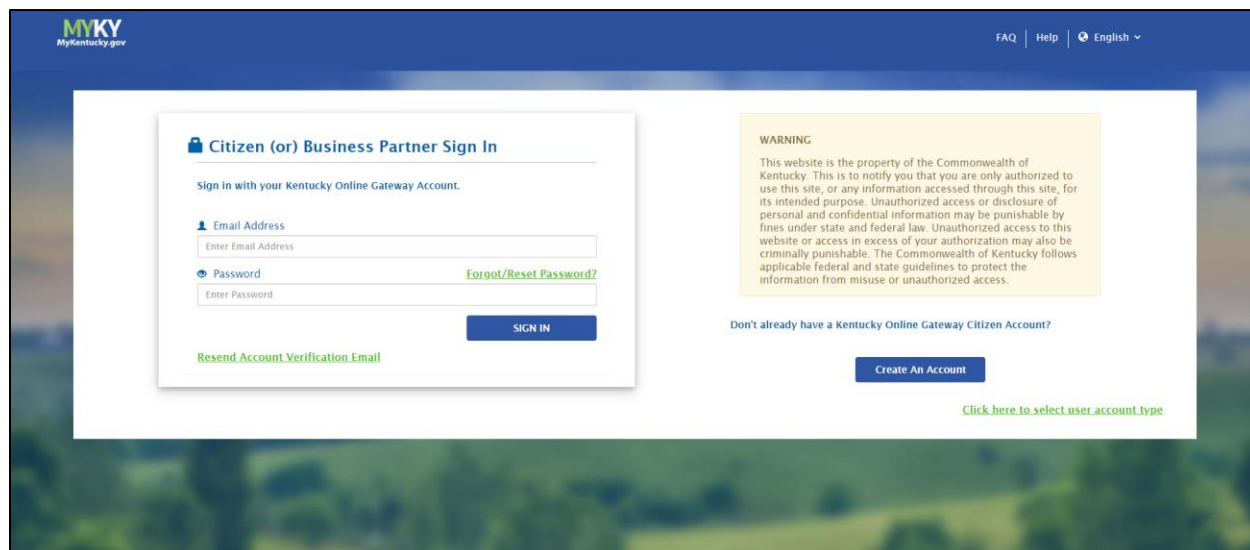


## KOG Account Validation

17. You will receive an email at the email address you provided when you created the account. This email is titled *Account Verification* from [KOG\\_DoNotReply@ky.gov](mailto:KOG_DoNotReply@ky.gov).



18. Click the **link** in the email to be directed to the **KOG Login Page**.



19. To register a phone number, you will have the option to receive a passcode via text.

- To register a phone number, enter a phone number and click **Send Passcode**.
- If you do not want to register a phone number, click **Skip and Continue** to proceed.

20. Click **Continue to Sign in** to navigate to the **KOG Login Page** and complete the account creation process.

21. On the **KOG Login Page**, enter your **Email Address**.

**Please Note:** You must enter the email address you provided when you created your KOG account.

22. Enter your **Password**.

**Please Note:** Your password is the password provided when you created your KOG account.

23. Click **Sign In** to access the ePartnerViewer.

**Citizen (or) Business Partner Sign In**

Sign in with your Kentucky Online Gateway Account.

Email Address  
jane.doe@gmail.com

Password  
..... [Forgot/Reset Password?](#)

**SIGN IN**

[Resend Account Verification Email](#)

**WARNING**

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[Don't already have a Kentucky Online Gateway Citizen Account?](#)

**Create An Account**

[Click here to select user account type](#)

24. After logging in, you have the option to register as an organ donor.

- To register as an organ donor, click **Yes, Register Now**.
- If you do not want to register as an organ donor, click **Remind me later** to proceed to the ePartnerViewer.

**Register as a Kentucky Organ Donor**

With the passing of KY SB77 and in partnership with Donate Life Kentucky, the Kentucky Online Gateway has created the below form for Kentuckians to join the Kentucky Organ Donor Registry. If you'd like to join the KYDR, please fill out the required fields below, select the consent checkbox, and click the "Register" button. For more information on what it means to be an organ donor, please visit <https://donatelife.ky.org/why-donate/>.

\* First Name: Jane

Middle Name:

\* Last Name: Doe

**Register as a Kentucky Organ Donor**

? Would you like to register as an organ donor?

With the passing of KY SB77 and in partnership with Donate Life Kentucky, the Kentucky Online Gateway has created an online portal for Kentuckians to join the Kentucky Organ Donor Registry. For more information on what it means to be an organ donor, please visit <https://donatelife.ky.org/why-donate/>

**Yes, Register Now** **Remind me later**

By submitting this registration I affirm that I am the applicant described on this application and that the information entered herein is true and correct to the best of my knowledge. This form will serve as donor document of gift as outlined in the Uniform Anatomical Gift Act. A document of gift, not revoked by the donor before death, is considered legal authorization for donation and does not require the consent of another. If I am under 18 years of age, I understand that consent must be obtained from my parents or legal guardian at the time of donation.

☐ I have read, understand, and agree to the above terms and conditions

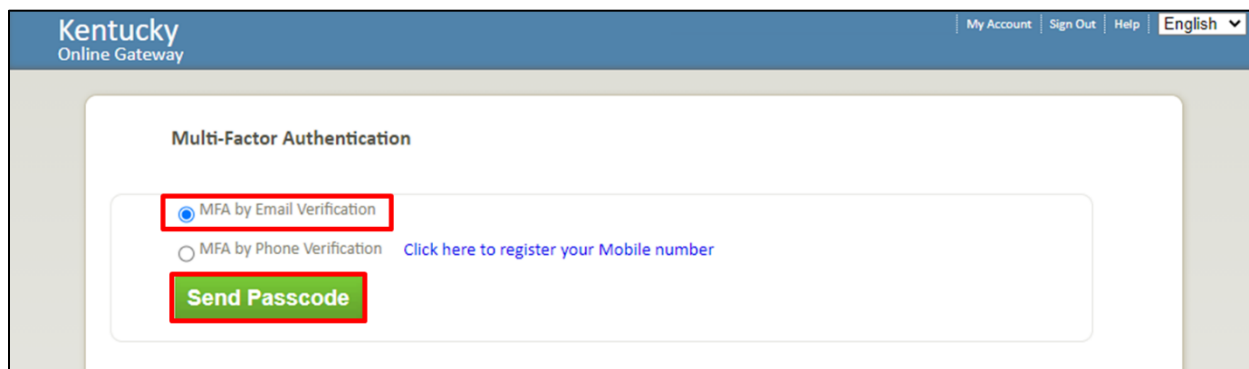
**Register** [Continue to the Application](#)

## Multi-Factor Authentication

After login, complete Multi-Factor Authentication or MFA. You have the option to receive an MFA passcode by Email or Text.

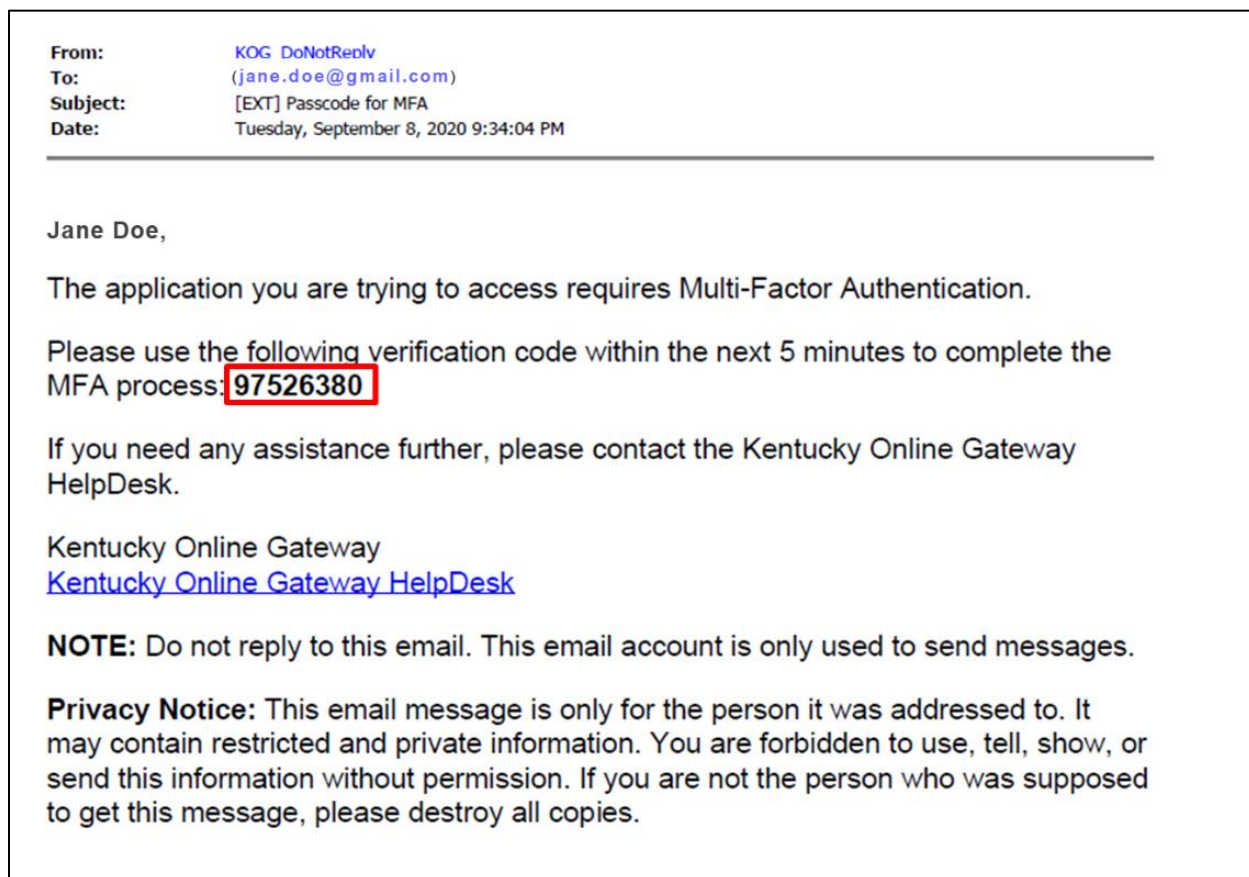
### MFA by Email Verification

25. To receive the MFA passcode by email, select the **MFA by Email Verification** button and click **Send Passcode**.



The screenshot shows the 'Kentucky Online Gateway' header with links for 'My Account', 'Sign Out', 'Help', and a language dropdown set to 'English'. The main content area is titled 'Multi-Factor Authentication'. It contains two radio button options: 'MFA by Email Verification' (which is selected and highlighted with a red box) and 'MFA by Phone Verification' (with a link 'Click here to register your Mobile number'). Below these options is a green 'Send Passcode' button, also highlighted with a red box.

26. You will receive an email titled *Passcode for MFA* from [KOG\\_DoNotReplay@ky.gov](mailto:KOG_DoNotReplay@ky.gov). You must open that email in a separate tab.



The screenshot shows an email interface. The header includes 'From: KOG DoNotReplay (jane.doe@gmail.com)', 'Subject: [EXT] Passcode for MFA', and 'Date: Tuesday, September 8, 2020 9:34:04 PM'. The body of the email addresses 'Jane Doe' and states: 'The application you are trying to access requires Multi-Factor Authentication. Please use the following verification code within the next 5 minutes to complete the MFA process: 97526380'. The code '97526380' is highlighted with a red box. It then provides contact information for the 'Kentucky Online Gateway HelpDesk' and includes a 'NOTE' and a 'Privacy Notice'.

27. Enter the **8-digit code** that is in the body of the email into the *Enter Passcode* field on the **Multi-Factor Authentication** screen.

Kentucky Online Gateway

Welcome Mitch Cavallo | My Account | Sign Out | Help | English ▼

### Multi-Factor Authentication

A one-time passcode has been sent to the email address associated with this account. Please enter the passcode in the box below.

E-Mail Address  [Resend Passcode?](#)

Enter Passcode  [Authenticate](#)

Didn't get your passcode? Sometimes it can take up to 5 minutes. If it's been longer than that, press "Resend passcode" button above.

28. Click **Authenticate** to be directed to the **Terms and Conditions** page in the ePartnerViewer.

Kentucky Online Gateway

Welcome Mitch Cavallo | My Account | Sign Out | Help | English ▼

### Multi-Factor Authentication

A one-time passcode has been sent to the email address associated with this account. Please enter the passcode in the box below.

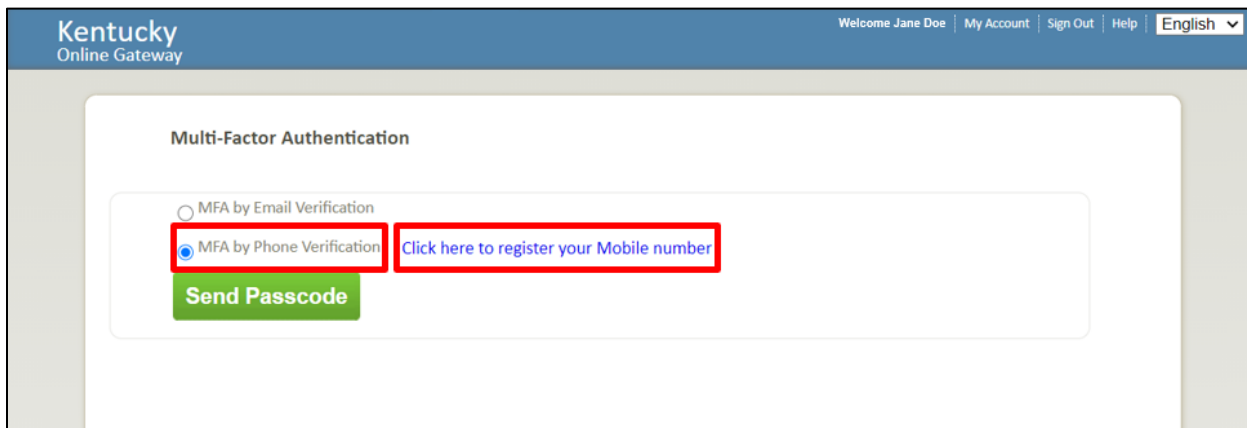
E-Mail Address  [Resend Passcode?](#)

Enter Passcode  [Authenticate](#)

Didn't get your passcode? Sometimes it can take up to 5 minutes. If it's been longer than that, press "Resend passcode" button above.

## MFA by Phone Verification

29. To receive the MFA passcode by text, click the **MFA by Phone Verification** button.
30. If you have not registered your phone number, select **Click here to register your Mobile number**.



Kentucky Online Gateway

Welcome Jane Doe | My Account | Sign Out | Help | English ▼

### Multi-Factor Authentication

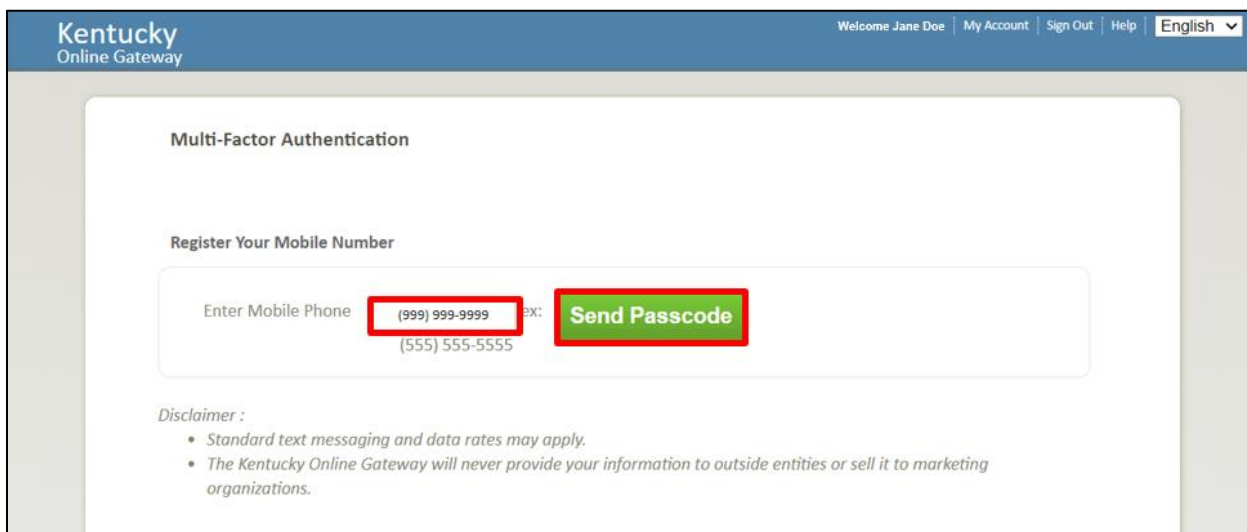
☐ MFA by Email Verification

☒ MFA by Phone Verification

[Click here to register your Mobile number](#)

**Send Passcode**

31. The **Register Your Mobile Number** screen displays for Users who have not registered their phone number. You must enter your **mobile phone number** and click **Send Passcode**.



Kentucky Online Gateway

Welcome Jane Doe | My Account | Sign Out | Help | English ▼

### Multi-Factor Authentication

#### Register Your Mobile Number

Enter Mobile Phone: (999) 999-9999 EX: (555) 555-5555

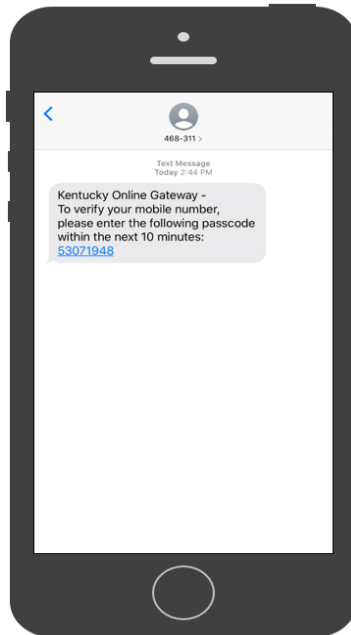
**Send Passcode**

*Disclaimer :*

- Standard text messaging and data rates may apply.
- The Kentucky Online Gateway will never provide your information to outside entities or sell it to marketing organizations.

**Please Note:** The **Register Your Mobile Number** screen does not display for Users who have already registered their phone number. Instead, these Users will be prompted to enter the passcode to validate and verify identify on the **Multi-Factor Authentication** screen.

32. You will receive a text message from the Kentucky Online Gateway that will include a passcode that will be used for verification.



**Please Note:** It may take up to 5 minutes to receive the passcode via text message. Click **Resend passcode** if you do not receive the text message within 5 minutes.

33. To verify the mobile number, enter the **8-digit code** from the text message into the *Enter Passcode* field on the **Multi-Factor Authentication** screen.
34. Click **Validate & Verify** to be directed to the **Terms and Conditions of Use** page in the ePartnerViewer.

The screenshot shows a 'Multi-Factor Authentication' screen. At the top, it says 'Multi-Factor Authentication'. Below that, a green message states: 'Your one-time passcode has been sent as a text message to your mobile number. You have 4 minutes to enter the passcode into the below field and click the "Validate & Verify" button.' Under the heading 'Verify Your Mobile Number', there are two input fields. The first is 'Enter Mobile Phone' with a placeholder '(999) 999-9999' and an example '(555) 555-5555'. To its right is a green button labeled 'Resend passcode'. The second field is 'Enter Passcode' with the value '53071948' entered. To its right is a red button labeled 'Validate & Verify'. At the bottom, a small text says: 'Didn't get your passcode? Sometimes it can take up to 5 minutes. If it's been longer than that, try again.'

**Please Note:** You must enter the passcode within 5 minutes of receiving the text message.



## 4 Terms of Use and Logging In

After logging into the Kentucky Online Gateway and completing Multi-Factor Authentication, the **Terms of Conditions and Use** page displays. Privacy and security obligations are outlined here.

**KHIE** | ePartnerViewer Mitch Cavallo

### TERMS AND CONDITIONS OF USE

**Terms and Conditions**  
HEALTHCARE PROVIDER USAGE TERMS AND CONDITIONS

I accept the following terms and conditions of the Kentucky Health Information Exchange (KHIE):

- I am a healthcare provider currently treating a patient.
- I am currently bound by a Health Information Exchange Participation Agreement with the Division of Health Information or have a current relationship as an authorized user of a participating provider of the Division of Health Information.
- I understand that data available on KHIE is only that information available according to state and federal law.

The Medicaid claims data will not include records of the following:

- HIV medical procedures and test.
- Diagnosis codes associated with alcohol abuse and drug treatment program records and NDC codes of drugs associated with the treatment of those patients.
- I understand that all data available on KHIE WILL NOT include HIV medical procedures and tests, regardless of source.

Select 'I accept' to accept the usage terms and conditions.

Access restricted beyond this point. You must accept terms and conditions before proceeding.

**Please Note:** The right side of the Portal is grayed out and displays a message that states: *Access is restricted beyond this point. You must accept the terms and conditions before proceeding.*

1. Once you click **I Accept**, the grayed out section becomes visible. A message appears that indicates you are associated with a particular *Organization*. This is the name of your healthcare organization.
2. Click **Proceed to Portal** to access the ePartnerViewer.

**KHIE** | ePartnerViewer Mitch Cavallo

### TERMS AND CONDITIONS OF USE

**Terms and Conditions**  
HEALTHCARE PROVIDER USAGE TERMS AND CONDITIONS

I accept the following terms and conditions of the Kentucky Health Information Exchange (KHIE):

- I am a healthcare provider currently treating a patient.
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- I understand that data available on KHIE is only that information available according to state and federal law.

The Medicaid claims data will not include records of the following:

- HIV medical procedures and test.
- Diagnosis codes associated with alcohol abuse and drug treatment program records and NDC codes of drugs associated with the treatment of those patients.
- I understand that all data available on KHIE WILL NOT include HIV medical procedures and tests, regardless of source.

Select 'I accept' to accept the usage terms and conditions.

You are part of the below mentioned organization. Please click on proceed to continue.

KHIE Smoke Test Organization

**Please Note:** When you click **Cancel**, you will see a pop-up notification indicating that you are *about to be logged out. Use of the ePartnerViewer portal is subject to the acceptance of KHIE's Terms of Use.* Click either **Logout Now** or **Cancel** to proceed to the ePartnerViewer.



## 5 myDASHBOARD Overview

### myDASHBOARD

Once you login, you will land on the ePartnerViewer's homepage, **myDASHBOARD**. From **myDASHBOARD**, you can quickly and easily search for a patient, view previously bookmarked patients, and review records of patients you've flagged to receive event notifications.

The **myDASHBOARD** is designed with the User in mind. It allows YOU to quickly and easily access the following functions:

- **Quick Search:** Enables you to complete a basic or advanced search using the mandatory search parameters: **First Name**, **Last Name**, and **Date of Birth**. While additional fields are optional, excluding additional criteria may produce multiple patient search results.
- **Bookmarked Patients:** Lists up to 5 of the most recent patients for whom you have elected to 'favorite' or bookmark to enable quick and easy access in the future. You can click on a patient name to go directly to that patient's chart. To see all of your Bookmarked patients, click **View all Bookmarked Patients**.
- **Event Notifications:** Displays up to 5 of the most recent notifications received over the last 72 hours for patients you've selected to receive notifications. Click **Refresh** to refresh the list of notifications. Click **View All Notifications** to see all notifications received.

The screenshot displays the myDASHBOARD interface within the ePartnerViewer application. The top navigation bar is dark blue with the KHIE logo and 'ePartnerViewer' text. Below this, a secondary navigation bar contains links for Patient Search, Bookmarked Patients, Event Notifications, Lab Data Entry, Secure Messaging, and Support. The main content area is titled 'myDASHBOARD' and features three primary sections, each outlined with a red border:

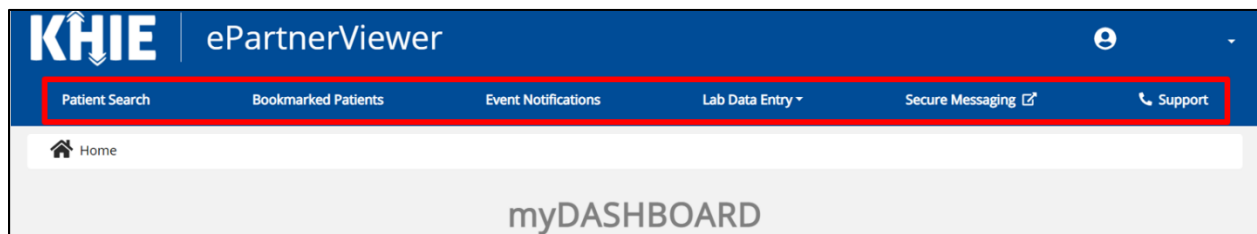
- Quick Search:** Includes input fields for First Name, Last Name, and Date Of Birth (MM/DD/YYYY), a Search button, and a link to ADVANCED SEARCH.
- Bookmarked Patients:** Currently empty, with a link to VIEW ALL BOOKMARKED PATIENTS.
- Event Notifications (Past 72 Hours):** Displays 'There is no data to be displayed' and includes a REFRESH button and a link to VIEW ALL NOTIFICATIONS.

## Navigation Bar

Above myDASHBOARD, in the blue Navigation Bar, Tabs provide advanced functionality. Clicking on these tabs takes you to the corresponding section in the ePartnerViewer.

The Tabs include:

- Patient Search
- Bookmarked Patients
- Event Notifications
- Lab Data Entry
- Case Report Entry
- Secure Messaging
- Support



**Please Note:** The **Lab Data Entry** and the **Case Report Entry** tabs only display in the *Navigation Bar* for users with associated roles.

## Patient Search Tab

Clicking on **Patient Search** enables users to complete an advanced search. How to search for a patient is covered in *Section 5 Searching for a Patient*.

A screenshot of the ePartnerViewer interface showing the 'Patient Search' tab selected in the navigation bar. The 'Patient Search' form is displayed on the left side of the screen, enclosed in a red rectangular box. The form has a dark gray header with the text 'PATIENT SEARCH'. Below the header are several input fields: 'First Name' with the value 'demoone', 'Last Name' with the value 'radpat', 'Sex' with radio buttons for 'Unspecified' (selected), 'Male', and 'Female', 'Date Of Birth' with a date picker showing 'MM/DD/YYYY', and 'Age Range' with a slider from 0 to 115. At the bottom of the form are 'SEARCH' and 'Clear All' buttons. The main content area on the right is light gray and contains the text 'No Searches Completed'.

## Bookmarked Patients Tab

The **Bookmarked Patients** feature allows users to quickly and easily navigate to specific patients they access frequently. How to bookmark a patient is covered in *Section 9 Bookmarking Patients*.

**KHIE ePartnerViewer**

Patient Search **Bookmarked Patients** Event Notifications Lab Data Entry Secure Messaging Support

Home > Bookmarked patients

**BOOKMARKED PATIENTS**

SHOWING 2 ITEMS

PATIENT NAME	DATE OF BIRTH
BRADY, BOBBY	07/12/1970
RADPAT, DEMOONE	08/01/1983

First Back 1 Next Last

Maximum 5 entries per page

## Event Notifications Tab

Event Notifications displays recent event notifications, deleted event notifications, and allows users to manage their event notifications. How to manage event notifications is covered in *Section 11 Reviewing and Managing Event Notifications*.

**KHIE ePartnerViewer**

Patient Search Bookmarked Patients **Event Notifications** Lab Data Entry Secure Messaging Support

Home > Notifications

**NOTIFICATIONS** REFRESH

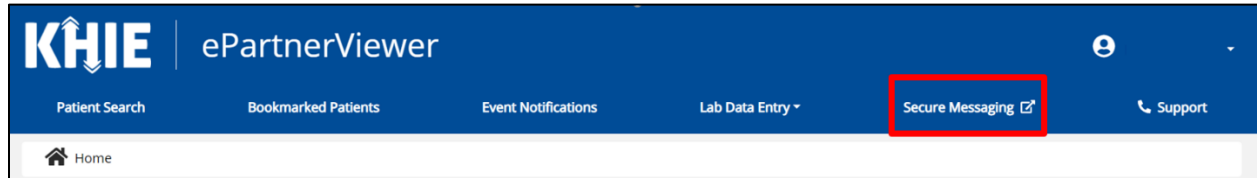
RECENT NOTIFICATIONS DELETED NOTIFICATIONS MANAGE NOTIFICATIONS

ACTION	EVENT DATE	NOTIFICATION DATE	EVENT	FACILITY	NAME	AGE
Delete	11/22/2020 12:00:00 am	11/25/2020 11:56:50 am	KHIE contains suspected drug overdose information	AMOHAMMAD	ANOTHER,ILLHAVE	21 years
Delete	11/22/2020 12:00:00 am	11/25/2020 11:56:48 am	Specialty Visit	AMOHAMMAD	ANOTHER,ILLHAVE	21 years
Delete	09/10/2020 12:03:08 pm	08/07/2020 2:07:56 pm	Results Ready for Review	TESTWS	HOUSE,COUNTRY	20 years
Delete	07/27/2020 6:06:44 pm	07/27/2020 6:13:55 pm	Possible Positive Test Result for COVID-19	TESTWS	ANOTHER,ILLHAVE	21 years
Delete	07/27/2020 6:06:44 pm	07/27/2020 6:13:54 pm	Results Ready for Review	TESTWS	ANOTHER,ILLHAVE	21 years

**Please Note:** Event Notifications are displayed only to Users who have set up this functionality for patients to receive event notifications.

## Secure Messaging Tab

This feature allows Users to access KHIE's Direct Secure Messaging (DSM) service. Direct Secure Messaging is the simple and secure method for healthcare providers to send patient health information to known and trusted recipients over a secure and encrypted network.



When you click **Secure Messaging**, you will be taken to the **CareAlign login page**. With a CareAlign account, you can send and receive direct secure messages. You can return to the ePartnerViewer by using the browser tab at the top of the screen.



**Please Note:** You must have a CareAlign account. You can find information about Direct Secure Messaging and CareAlign in Resources.

KHIE hosts a Direct Email Catalog where healthcare providers can submit and share their Direct Secure email addresses. Participants may utilize this tool to search for referral partners located across the Commonwealth and its bordering states.

## Support Tab

Clicking the Support Tab enables you to quickly seek assistance regarding the ePartnerViewer. You can easily inform us of an issue or concern, submit a question(s), or report persistent issues you may have with the ePartnerViewer. To reach us, you can call or email us using the information provided, or you may complete an online form right there in the ePartnerViewer.

The screenshot shows the KHIE ePartnerViewer interface with the 'Support' tab highlighted in the top navigation bar. A modal window titled 'Support' is open, containing a form with the following fields: 'Category\*' (a dropdown menu), 'Subject\*', and 'Message\*'. Below the message field is a rich text editor with a toolbar and a character count. An 'Upload File' section includes a 'Browse...' button and a note: 'Maximum upload file size should not exceed 2MB. Acceptable File Format: .pdf, .doc, .docx, .jpg, .jpeg, .png, .gif'. At the bottom of the form are 'Cancel' and 'Send' buttons. A 'Contact us' section at the bottom of the modal provides contact information for the KHIE Support Desk.

**Category\***  
Select...

**Subject\***

**Message\***

12pt B I U A [Rich Text Editor Icons]  
0/10000 Characters

**Upload File**  
Browse...

Maximum upload file size should not exceed 2MB  
Acceptable File Format: .pdf, .doc, .docx, .jpg, .jpeg, .png, .gif

Cancel Send

**Contact us**  
For persistent issues, please contact the KHIE Support Desk  
Phone: +1 (877) 651 - 2505  
Email: KHIESupport@ky.gov

## User Profile

The User Profile allows you to manage your preferences and logout of the ePartnerViewer.

The screenshot shows the KHIE ePartnerViewer interface with the user profile dropdown menu open. The menu is located in the top right corner and contains the following options: 'Jane Doe' (with a user icon), 'Preferences', and 'Logout'. The 'Logout' option is highlighted.

**Jane Doe**

Preferences

Logout

## 6 Searching for a Patient

In the ePartnerViewer, Users have two options to search for a patient. The first method is the Quick Search which can be accessed from the **myDASHBOARD** screen. The second is the Advanced Search which can be accessed from the *Navigation Bar*.

### Quick Search for a Patient

1. From the *Quick Search Section* of **myDASHBOARD**, enter the Patient's **First Name** and **Last Name**. The *First Name* and *Last Name* fields are required fields.
2. Enter the Patient's **Date of Birth**. Enter 2 digits for the month, 2 digits for the day, and 4 digits for the year. (e.g. 01/01/2000).

The screenshot shows the 'myDASHBOARD' interface with three main sections: 'Quick Search', 'Bookmarked Patients', and 'Event Notifications (Past 72 Hours)'. In the 'Quick Search' section, there are input fields for 'First Name', 'Last Name', and 'Date Of Birth' (MM/DD/YYYY). The 'First Name' and 'Last Name' fields are highlighted with red boxes. Below these fields is a 'Search' button. At the bottom of the 'Quick Search' section, there is a link for 'ADVANCED SEARCH'. The 'Bookmarked Patients' section lists three patients: BRADY, BOBBY; ALLYSON, RUSHING; and QOESD, VASREY. At the bottom of this section is a link for 'VIEW ALL BOOKMARKED PATIENTS'. The 'Event Notifications' section displays 'There is no data to be displayed'. At the bottom of this section are links for 'REFRESH' and 'VIEW ALL NOTIFICATIONS'.

**Please Note:** A search using only the patient's first and last names may return multiple patient results. Entering additional search criteria such as the date of birth may narrow the matching patient search result(s).

3. Click **Search** to search for the patient.

This screenshot is identical to the one above, showing the 'myDASHBOARD' interface. In this view, the 'Search' button in the 'Quick Search' section is highlighted with a red box.

4. Click **View** to review the patient's chart.

The screenshot shows the 'Patient Search' results page. On the left is a search filter panel with fields for First Name (Bobby), Last Name (Brady), Sex (Male), Date Of Birth (07/12/1970), and Age Range (40-70). The main area displays '1 PATIENT MATCH FOUND' for 'BRADY, BOBBY', 50 years old, with address 1234 TEST ST LEXINGTON KY 40137. A red box highlights the 'VIEW' button. Below the patient info is a link to 'VIEW 1 SIMILAR RESULT'.

## Advanced Search

Advanced Search enables users to complete a refined search for a patient.

1. To complete an Advanced Search, click the **Patient Search** tab in the *Navigation Bar* OR click **Advanced Search** in the *Quick Search* section of **myDASHBOARD**.

The screenshot shows the 'myDASHBOARD' interface. The 'Patient Search' tab is highlighted in the top navigation bar. The dashboard has three main sections: 'Quick Search' with input fields for First Name, Last Name, and Date Of Birth, and a 'Search' button; 'Bookmarked Patients' showing a list of patients (BRADY, BOBBY; ALLYSON, RUSHING; QOESD, VASREY) and a 'VIEW ALL BOOKMARKED PATIENTS' link; and 'Event Notifications (Past 72 Hours)' showing 'There is no data to be displayed' and a 'REFRESH' button. A red box highlights the 'ADVANCED SEARCH' link in the bottom left of the Quick Search section.

2. On the **Patient Search** screen, enter the Patient's **First Name** and **Last Name**.

The screenshot shows the 'Patient Search' interface. On the left, the search criteria are: First Name 'Bobby', Last Name 'Brady', Sex 'Male' (selected), Date of Birth '07/12/1970', and Age Range '0 - 115'. On the right, the results show '1 PATIENT MATCH FOUND' for 'BRADY, BOBBY', 50 years old, DOB 07/12/1970, Sex M, Address 1234 TEST ST LEXINGTON KY 40137. A 'VIEW' button is present. Below the match, there is a link to 'VIEW 1 SIMILAR RESULT'.

**Please Note:** First Name and Last Name are mandatory fields. If users attempt to search for a patient without entering **First Name and Last Name**, the **Patient Search** screen displays the following messages in red under the respective fields:

- *Enter First Name*
- *Enter Last Name*

3. Select the patient's **Sex**.
4. Enter the patient's **Date of Birth**. To enter the Date of Birth, enter two digits for the month, two digits for the day, and two digits for the year.

This screenshot shows the same 'Patient Search' interface, but with red error messages under the 'Sex' and 'Date of Birth' fields. The 'Sex' field has a red box around it with the message 'Enter First Name' (though the message text is not visible in the image). The 'Date of Birth' field has a red box around it with the message 'Enter Last Name' (though the message text is not visible in the image). The search criteria on the left are: First Name 'Bobby', Last Name 'Brady', Sex 'Male' (selected), Date of Birth '07/12/1970', and Age Range '0 - 115'. The results on the right show '1 PATIENT MATCH FOUND' for 'BRADY, BOBBY', 50 years old, DOB 07/12/1970, Sex M, Address 1234 TEST ST LEXINGTON KY 40137. A 'VIEW' button is present. Below the match, there is a link to 'VIEW 1 SIMILAR RESULT'.



5. Select an **Age Range** when the patient's Date of Birth is unknown.

The screenshot shows the 'Patient Search' interface. On the left, the 'PATIENT SEARCH' section has input fields for 'First Name' (Bobby), 'Last Name' (Brady), 'Sex' (Male), and 'Date Of Birth'. The 'Age Range' slider is highlighted with a red box, showing a range from 0 to 115 with a selected range of 40 - 70. Below the slider are 'SEARCH' and 'Clear All' buttons. On the right, the search results show '1 PATIENT MATCH FOUND' for 'BRADY, BOBBY', 50 years old, DOB 07/12/1970, Sex M, Address 1234 TEST ST LEXINGTON KY 40137. A 'VIEW' button and a 'VIEW 1 SIMILAR RESULT' link are also present.

6. Click **Search** to initiate the search. The search results display on the right side of the page.

This screenshot is identical to the previous one, but the 'SEARCH' button in the 'PATIENT SEARCH' section is highlighted with a red box, indicating the next step in the process.

**Please Note:** Users can click **Clear All** to clear the search fields and quickly search for a new patient.

7. Select **View** to review the patient's chart.

The screenshot shows the 'Patient Search' interface. On the left, there are search filters: First Name (Bobby), Last Name (Brady), Sex (Male), Date Of Birth (MM/DD/YYYY), and Age Range (40 - 70). A 'SEARCH' button and a 'Clear All' link are at the bottom of the filters. On the right, a 'PATIENT MATCH FOUND' section displays the patient's details: 50 years old, BRADY, BOBBY, DOB 07/12/1970, Sex M, and Address 1234 TEST ST LEXINGTON KY 40137. A 'VIEW' button is highlighted with a red box. Below the patient details is a light blue bar with a magnifying glass icon, the text 'VIEW 1 SIMILAR RESULT', and a plus sign icon in a blue box.

**Please Note:** Depending on the search information entered by the User, patient searches may generate multiple search results. Users can click the **Plus/Minus Sign** to the right of *View Similar Result* to review or hide any similar search results and confirm the correct patient has been identified.

This screenshot shows the 'PATIENT MATCH FOUND' section with two patient results. The first result is for Bobby Brady, 50 years old, DOB 07/12/1970, Sex M, Address 1234 TEST ST LEXINGTON KY 40137, with a 'VIEW' button. The second result is for Robert Brady, 50 years old, DOB 06/12/1970, Sex M, Address 154 BARBERRY LN BARDSTOWN KY 40004, also with a 'VIEW' button. Between the two results is a light blue bar with a magnifying glass icon, the text 'VIEW 1 SIMILAR RESULT', and a minus sign icon in a blue box, which is highlighted with a red box.

## 7 Basic Features in the Patient Chart

The purpose of this section is to briefly describe the basic features of the Patient Chart in the ePartnerViewer.

### Date Selection

The Date Selection feature allows users to control how much data is retrieved for a patient. For example, when a search is initiated, the ePartnerViewer's **standard default** is set to retrieve the last twelve (12) months of data for a patient. You can change the default setting in *Preferences* located in the top right corner under the User Name.

Once the data is retrieved on the initial search, you can use the Date Selection radio buttons to display more or less data or do a Custom search.

1. You can select the **appropriate Data Selection radio button** to view the latest patient data within the selected time frame.
  - Select **3 months** to see the latest 3 months of patient data.
  - Select **6 months** to see the latest 6 months of patient data.
  - Select **9 months** to see the latest 9 months of patient data.
  - Select **12 months** to see the latest 12 months of patient data.

The screenshot shows the ePartnerViewer interface for a patient named RADPAT, DEMOONE. The patient is 37 years old, born on 1983/08/01, and lives at 121 MAN OWAR DR QUAKERTOWN LEXINGTON KY 40802. The 'DATE SELECTION' section is highlighted, showing radio buttons for 3 months, 6 months, 9 months, 12 months, and Custom. The '12 months' option is selected and highlighted with a red box. A 'Retrieve' button is also visible.

2. Select **Custom** to retrieve data for specific date range.
  - Enter the **Start Date** and the **End Date**.

The screenshot shows the ePartnerViewer interface for the same patient. The 'DATE SELECTION' section is highlighted, and the 'Custom' radio button is selected and highlighted with a red box. The 'Start Date' and 'End Date' fields are also highlighted with red boxes. A calendar pop-up is visible for the 'End Date' field, showing the month of April 2021.

**Please Note:** The **Start Date** and **End Date** fields only display when Users select **Custom**. **Start Date** and **End Date** are required fields when selecting the **Custom** setting; if a start date and end date are not entered, the following error message displays:

- *Error: Start Date and End Date are required fields.*

3. Once a Date Selection has been made, click **Retrieve** to generate the patient's data.

## Pagination

Throughout the patient chart, Users navigate through multiple pages of data. Using the pagination buttons, select a specific page number, move to the next or previous page, or move to the first or last page of a list.

1. Click a **Page Number** to go to that specific page in the list.
2. Click **Next** to go to following page list.
3. Click **Back** to go to the previous page list.
4. Click **First** to go to first page in the list.
5. Click **Last** to go to the last page in the list.

SHOWING 14 ITEMS		
MEDICATION	PRESCRIBED BY	DETAILS + EXPAND ALL
Insulin Glargine,Hum.rec.anlog (Lantus Solostar) 300 Unit/3 MI INSULN,PEN		View More
Metoprolol Succinate		View More
Asa/Calcium Carb/Mag/Al Hydrox (Bayer Plus 500 Mg Caplet) 500 MG TABLET		View More
Atorvastatin Calcium (Lipitor 10mg Tab) 10 MG TABLET		View More
<div> <span>First</span> <span>Back</span> <span>1</span> <span>Next</span> <span>Last</span> </div> <div>Maximum 5 entries per page</div>		

Users can control the number of entries that display per page. For example, you may prefer to see only five (5) entries per page or you may prefer to see all entries available on one page.

- MEDICATION HISTORY

SHOWING  
14 ITEMS

MEDICATION	PRESCRIBED BY	DETAILS	+ EXPAND ALL
Insulin Glargine,Hum.rec.anlog (Lantus Solostar) 300 Unit/3 MI INSULN.PEN		View More	
Metoprolol Succinate		View More	
		View More	
Asa/Calcium Carb/Mag/Al Hydrox (Bayer Plus 500 Mg Caplet) 500 MG TABLET		View More	
Atorvastatin Calcium (Lipitor 10mg Tab) 10 MG TABLET		View More	

First

Back

1

Next

Last

Maximum 

5

 entries per page

Tabs and Portlets in the Patient Summary contain lists of Available Documents for review. There are several methods of sorting and filtering these lists within the patient chart.

Patient Search
Bookmark Patients
Event Notifications
Secure Messaging
Support

Home > Patient search > BOBBY BRADY

50 years old
BRADY, BOBBY
DOB Jul 12 1970
Sex M
Address 1234 TEST ST LEXINGTON KY 40137
Bookmarked
View More

DATE SELECTION
3 months
6 months
9 months
12 months
Custom
Retrieve

Showing Data for Apr 13 2020 to Apr 14 2021

Patient Summary
Medications & Allergies
Clinical Documents
Laboratory & Pathology
Reports
Encounters
Immunizations
Uncategorized
Patient Demographics

LABORATORY

AVAILABLE DOCUMENTS
Organize Documents By...

FILTER DOCUMENTS
Search by name or title...

12/04/2020 SARS coronavirus 2 RNA [Presence] 12:00:00 am
12/03/2020 Ethanol [Mass/volume] in Urine 6:24:00 am
12/03/2020 Urinalysis complete W Reflex Culture panel - Urine 6:24:00 am
12/03/2020 Lipid 1996 panel - Serum or Plasma 6:24:00 am
12/03/2020 Magnesium [Mass/volume] in Serum or Plasma 6:24:00 am
12/03/2020 Total cholesterol [Mass/volume] in Serum or Plasma 6:24:00 am

Incomplete or missing information
The information displayed on this page is based on the data provided by participating facilities. You may need to contact the source for more information.

Can't find what you're looking for?
A submitted report that has not been designated as a particular type of result will be included in Uncategorized data. Laboratory, Pathology, Transcription and Radiology reports may also appear here.
View Uncategorized Data

SARS CORONAVIRUS 2 RNA [PRESENCE]
APPLY FILTER

ORDERING PHYSICIAN: SCOTT SPEARMAN
OBSERVATION DATE: DEC 04 2020
TIME DETAINED: 00:00

SHOWING 9 ITEMS

FLAG	NAME	VALUE	UNIT	REFERENCE RANGES	RESULT
	SARS coronavirus 2 RNA [Presence]	DETECTED		NOT DETECTED	Abnormal
	Has symptoms related to condition of interest	Yes			
	Date and time of symptom onset	2020-11-30			
	Employed in a healthcare setting	No			

1. Select an **Available Document** to review it. The document opens on the right side.

The screenshot shows the ePartnerViewer interface with the 'LABORATORY' tab selected. On the left, the 'AVAILABLE DOCUMENTS' panel is open, showing a list of documents. The document '12/04/2020 SARS coronavirus 2 RNA [Presence] 12:00:00 am' is highlighted. On the right, the 'SARS CORONAVIRUS 2 RNA [PRESENCE]' report is displayed, showing the ordering physician (SCOTT SPEARMAN), observation date (DEC 04 2020), and time obtained (00:00). The report includes a table with the following data:

FLAG	NAME	VALUE	UNIT	REFERENCE RANGES	RESULT
⚠	SARS coronavirus 2 RNA [Presence]	DETECTED		NOT DETECTED	Abnormal
	Has symptoms related to condition of interest	Yes			

2. To refine the list of available documents, enter a **Document Name** in *Filter Documents*.

The screenshot shows the ePartnerViewer interface with the 'LABORATORY' tab selected. On the left, the 'AVAILABLE DOCUMENTS' panel is open, and the 'FILTER DOCUMENTS' search box contains the text 'Lipid'. The document '12/03/2020 Lipid 1996 panel - Serum or Plasma 6:24:00 am' is highlighted. On the right, the 'SARS CORONAVIRUS 2 RNA [PRESENCE]' report is displayed, showing the ordering physician (SCOTT SPEARMAN), observation date (DEC 04 2020), and time obtained (00:00). The report includes a table with the following data:

FLAG	NAME	VALUE	UNIT	REFERENCE RANGES	RESULT
⚠	SARS coronavirus 2 RNA [Presence]	DETECTED		NOT DETECTED	Abnormal

3. Select **Organize Documents By** to organize the list of available documents by date or to list all available documents.

The screenshot shows the ePartnerViewer interface with the 'LABORATORY' tab selected. On the left, the 'AVAILABLE DOCUMENTS' panel is open, and the 'Organize Documents By' dropdown is open, showing options for '2020', 'December', '12/04/2020', '12/03/2020', and '12/02/2020'. The document '12/04/2020 SARS coronavirus 2 RNA [Presence] 12:00:00 am' is highlighted. On the right, the 'SARS CORONAVIRUS 2 RNA [PRESENCE]' report is displayed, showing the ordering physician (SCOTT SPEARMAN), observation date (DEC 04 2020), and time obtained (00:00). The report includes a table with the following data:

FLAG	NAME	VALUE	UNIT	REFERENCE RANGES	RESULT
⚠	SARS coronavirus 2 RNA [Presence]	DETECTED		NOT DETECTED	Abnormal

## Applying a Filter

Users can apply a filter to a report to refine the display of patient data or sort for a specific piece of information. The specific filtering options vary depending on the type of report reviewed. Filters consist of drop-down menus and/or text fields.

1. Click **Apply Filter** to filter for specific information. After entering the appropriate search criteria, all applicable information displays for review.

The screenshot shows the 'MEDICATION HISTORY' report interface. At the top, there is a navigation bar with tabs: Patient Summary, Medications & Allergies, Clinical Documents, Laboratory & Pathology, Reports, Encounters, Immunizations, Uncategorized, and Patient Demographics. Below this, there are two main sections: 'MEDICATIONS' and 'ALLERGIES'. The 'MEDICATIONS' section is active, displaying a table of medication history. The table has columns for 'MEDICATION', 'PRESCRIBED BY', and 'DETAILS'. The 'DETAILS' column includes a 'View More' link and a '+ EXPAND ALL' button. The table shows five rows of medication data. At the bottom of the table, there is a pagination control with buttons for 'First', 'Back', '1', '2', '3', 'Next', and 'Last'. The '1' button is highlighted. To the right of the pagination, there is a 'Maximum' dropdown menu set to '5' and the text 'entries per page'. In the top right corner of the 'MEDICATION HISTORY' section, there is a red button labeled 'APPLY FILTER'.

MEDICATION	PRESCRIBED BY	DETAILS	+ EXPAND ALL
Insulin Glargine,Hum.rec.anlog (Lantus Solostar) 300 Unit/3 MI INSULN.PEN		View More	
Metoprolol Succinate		View More	
Asa/Calcium Carb/Mag/Al Hydrox (Bayer Plus 500 Mg Caplet) 500 MG TABLET		View More	
Atorvastatin Calcium (Lipitor 10mg Tab) 10 MG TABLET		View More	
Valsartan		View More	

2. Select **Hide Filter** to remove the filter.





The screenshot shows the 'MEDICATION HISTORY' report interface, similar to the previous one, but with the 'HIDE FILTER' button highlighted. The 'MEDICATION' column now has a text input field labeled 'Enter Medication...'. The 'PRESCRIBED BY' column has a text input field labeled 'Enter Prescribed By...'. The 'DETAILS' column still has a 'View More' link and a '+ EXPAND ALL' button. The table shows five rows of medication data. At the bottom of the table, there is a pagination control with buttons for 'First', 'Back', '1', '2', '3', 'Next', and 'Last'. The '1' button is highlighted. To the right of the pagination, there is a 'Maximum' dropdown menu set to '5' and the text 'entries per page'. In the top right corner of the 'MEDICATION HISTORY' section, there is a red button labeled 'HIDE FILTER'.

MEDICATION	PRESCRIBED BY	DETAILS	+ EXPAND ALL
Insulin Glargine,Hum.rec.anlog (Lantus Solostar) 300 Unit/3 MI INSULN.PEN		View More	
Metoprolol Succinate		View More	
Asa/Calcium Carb/Mag/Al Hydrox (Bayer Plus 500 Mg Caplet) 500 MG TABLET		View More	
Atorvastatin Calcium (Lipitor 10mg Tab) 10 MG TABLET		View More	
Valsartan		View More	

## ePartnerViewer Icons

Clinical reports in the patient chart may contain Icons that serve as visual indicators to draw attention to specific information.

### Icon Descriptions:

Icon	Name	Description
	<b>Abnormal Result</b>	Indicates a report contains abnormal value(s)
	<b>Critical Result</b>	Indicates a report contains value(s) that are of a critical nature
 Bookmark	<b>Unbookmarked Patient</b>	Indicates the patient chart is not bookmarked; the user can elect to add the selected patient to the Bookmarked Patients list
 Bookmarked	<b>Bookmarked Patient</b>	Indicates the patient chart is bookmarked; the selected patient has been added to the Bookmarked Patients list

**Please Note:** A Reference Range Notification is a pop-up notification that informs the user that a laboratory value has been resulted based on the performing lab's reference range. This occurs when an ePartnerViewer user reviews a lab report for the first time. After clicking **Accept**, this notification does not appear on subsequent access.



## 8 The Patient Chart

### Overview of the Patient Chart

In the ePartnerViewer, the patient chart is categorized into clinically relevant groups for easy review. Each patient chart has Tabs that contain the patient data. The Tabs include the data shared by all participating organizations and are categorized by the clinical data they display; they house the data that displays in the Portlets. The Tabs are fixed and cannot be customized.

One of the Tabs, the Patient Summary, houses the Portlets. The **Patient Chart** opens in the Patient Summary where the Portlets are designed to provide a quick and easy *Patient-at-a-Glance* view of the patient's most recent health history. The snapshot displays up to five of the most recent result reports available. The Portlets are customizable. You can arrange them in the order that is most useful for you. While the Portlet view displays the most recent health history for each clinical category, you can click *View All* located at the bottom of each Portlet to see all the data available on that patient in that category.

You may choose to view the clinical information in either the Tabs or the Portlets. The key difference between the two is that the Portlets are designed to provide a quick and easy *Patient-at-a-Glance* view of the most recent data available on a patient.

The screenshot displays the ePartnerViewer Patient Chart interface. At the top, there is a 'DATE SELECTION' section with radio buttons for 3 months, 6 months, 9 months, 12 months (selected), and Custom, along with a 'Retrieve' button. Below this is a 'Showing Data for 07/09/2020 to 07/08/2021' status bar. A red box labeled 'Tabs' highlights the navigation bar containing the following tabs: Patient Summary, Medications & Allergies, Clinical Documents, Laboratory & Pathology, Reports, Encounters, Immunizations, Uncategorized, and Patient Demographics. The 'Patient Summary' tab is active, showing a grid of Portlets. A red box labeled 'Portlets' highlights the 'CLINICAL DOCUMENTS' and 'ENCOUNTERS' Portlets. The 'CLINICAL DOCUMENTS' Portlet shows a table with columns for DATE, NAME, and a list of documents. The 'ENCOUNTERS' Portlet shows a table with columns for START DATE, DIAGNOSIS, and a list of encounters. Other Portlets visible include LABORATORY, RADIOLOGY, PATHOLOGY, TRANSCRIBED REPORTS, UNCATEGORIZED, IMMUNIZATIONS, PROBLEMS, PROCEDURES, MEDICATIONS, and ALLERGIES. Each Portlet has a 'VIEW ALL' link at the bottom.

DATE	NAME
07/08/2021	KHIE Summary CCD
07/08/2021	KHIE Medicaid CCD
07/07/2021	UKHC - Visit Notification ...
07/07/2021	UKHC - Visit Notification ...
07/06/2021	UKHC - Visit Notification ...

START DATE	DIAGNOSIS
07/07/2021	Pecked by Chicken
07/07/2021	Pecked by Chicken
07/06/2021	Pecked by Chicken
07/06/2021	Pecked by Chicken
06/30/2021	Pecked by Chicken

**Please Note:** Authorized KASPER (Kentucky All Schedule Prescription Electronic Reporting) users will see an additional Portlet that displays the Prescription Drug Monitoring Program (PDMP) report.

## Data Retrieval

The ePartnerViewer collects clinical information about a patient in stages. The patient's chart opens in the *Patient Summary*. There are three indicators that turn from blue to green as the clinical information is pulled in from various sources and is ready to review.

**KHIE | ePartnerViewer**

Patient Search | Bookmarked Patients | Event Notifications | Lab Data Entry | Secure Messaging | Support

Home > Patient search > BOBBY BRADY

**50** years old | **BRADY, BOBBY** | DOB 1970/07/12 | Sex M | Address 1234 TEST ST LEXINGTON KY 40137 | Bookmarked | View More

**DATE SELECTION** | ☐ 3 months | ☐ 6 months | ☐ 9 months | ☒ 12 months | ☐ Custom | Retrieve

Patient Summary | Medications & Allergies | Clinical Documents | Laboratory & Pathology | Reports | Encounters | Immunizations | Uncategorized | Patient Demographics

CLINICAL DOCUMENTS		ENCOUNTERS		LABORATORY		RADIOLOGY	
DATE	NAME	START DATE	DIAGNOSIS	COMPLETED DATE	NAME	COMPLETED DATE	NAME
04/14/2021	UKHC - Visit Notification Note	04/14/2021	Pecked by Chicken	12/04/2020	SARS coronavirus 2 RNA [Presence]	02/27/2021	RadTesting Imaging extra
04/14/2021	UKHC - Visit Notification Note	04/14/2021	Pecked by Chicken	12/03/2020	Lipid 1996 panel -	12/04/2020	XRAY LEG

As noted in *Section 7 Basic Features in the Patient Chart*, Users can control how much data is retrieved upon initial search by setting a default Date Selection option available in Preferences. Typically, the shorter the timeframe selected, the faster the data retrieval process.

**Please Note:** Choosing a shorter timeframe in *Date Selection* will limit the number of records available. The ePartnerViewer's standard setting is to collect the latest twelve (12) months of data.

## Patient-at-a-Glance (Patient Summary)

The Patient Summary provides a snapshot of a patient's health history. Up to five of the most recent result reports and clinical documents are displayed in the Portlets, giving clinicians that *Patient-at-a-Glance view*. However, you can view all available information by clicking on *View All* located at the bottom of every Portlet.

### Portlets Available

1 Clinical Documents	6 Transcribed Reports	11 Allergies
2 Encounters	7 Immunizations	12 Electronic Case Reports
3 Laboratory	8 Procedures	13 Uncategorized
4 Pathology	9 Problems	14 PDMP Program
5 Radiology	10 Medications	15 Sensitive Data

You can arrange and/or hide the Portlets to fit your specific needs. This is covered in *Section 12 Managing User Preferences*.

The screenshot displays the Patient Summary interface for Bobby Brady, a 50-year-old male. The top navigation bar includes links for Patient Search, Bookmarked Patients, Event Notifications, Secure Messaging, and Support. Below the patient's basic information (Name, DOB, Sex, Address), there is a DATE SELECTION section with radio buttons for 3, 6, 9, 12 months, and Custom, along with a Retrieve button. The main content area is divided into several portlets: Clinical Documents, Encounters, Laboratory, Radiology, Medications & Allergies, Reports, Encounters, Immunizations, Uncategorized, and Patient Demographics. The Clinical Documents portlet is highlighted with a red box and contains a table of documents. The Laboratory portlet shows a table of test results, with 'Magnesium (Mass/volume) in Serum or Plasma' highlighted. The Radiology portlet shows a table of imaging studies.

DATE	NAME
04/15/2021	KHIE Summary CCD
04/15/2021	KHIE Medicaid CCD
04/14/2021	UKHC - Visit Notification Note
04/14/2021	UKHC - Visit Notification Note
04/12/2021	UKHC - Visit Notification Note

START DATE	DIAGNOSIS
04/14/2021	Pecked by Chicken
04/14/2021	Pecked by Chicken
04/12/2021	Pecked by Chicken
04/09/2021	Pecked by Chicken

COMPLETED DATE	NAME
12/04/2020	SARS coronavirus 2 RNA [Presence]
12/03/2020	Lipid 1996 panel - Serum or Plasma
12/03/2020	Magnesium (Mass/volume) in Serum or Plasma
12/03/2020	Comprehensive metabolic 2000 panel - Serum or Plasma
12/03/2020	Ethanol (Mass/volume) in Urine

COMPLETED DATE	NAME
02/27/2021	RadTesting imaging extra
12/04/2020	XRAY CHEST 2 VIEW
12/04/2020	XRAY LEG

**Please Note:** When there is KASPER data available on a patient, Users with existing KASPER access can click on the *PDMP Program Portlet* to retrieve the KASPER report. The report can be viewed in the *PDMP Program Portlet* and in the *Clinical Documents Portlet*.

KASPER Users must **use the same KOG ID linked to their KASPER account to view KASPER data in the ePartnerViewer**. KOG authenticates when an ePartnerViewer user is also an authorized KASPER user.


1. Users can view all available information by clicking on **View All** located at the bottom of every Portlet.

Patient Summary

Medications & Allergies


Clinical Documents

Laboratory & Pathology



CLINICAL DOCUMENTS

DATE ▾	NAME
04/15/2021	KHIE Summary CCD
04/15/2021	KHIE Medicaid CCD
04/14/2021	UKHC - Visit Notification Note
04/14/2021	UKHC - Visit Notification Note
04/12/2021	UKHC - Visit Notification Note
<div>&gt; VIEW ALL CLINICAL DOCUMENTS</div>	



ENCOUNTERS

START DATE ▾	DIAGNOSIS
04/14/2021	Pecked by Chicken
04/14/2021	Pecked by Chicken
04/12/2021	Pecked by Chicken
04/12/2021	Pecked by Chicken
04/09/2021	Pecked by Chicken
<div>&gt; VIEW ALL ENCOUNTERS</div>	

## Reviewing the Tabs

In addition to viewing a patient's data from the Patient Summary's Portlet view, users can access the data in the patient chart by navigating the Tabs.

The **Patient Summary** tab displays the Portlets which show the most recent patient data 'at-a-glance'. The Portlets can be customized to meet your specific needs.

1. Click **Patient Summary** to view the Portlets.

The screenshot shows the 'Patient Summary' tab selected in the top navigation bar. Below the navigation bar, there is a 'DATE SELECTION' section with radio buttons for 3 months, 6 months, 9 months, 12 months (selected), and Custom. A 'Retrieve' button is to the right. Below this, a red box highlights the 'Portlets' section, which contains eight portlets: CLINICAL DOCUMENTS, ENCOUNTERS, LABORATORY, RADIOLOGY, PATHOLOGY, TRANSCRIBED REPORTS, UNCATEGORIZED, and IMMUNIZATIONS. Each portlet displays a table of patient data with columns for date, name, and description. The 'CLINICAL DOCUMENTS' portlet shows a table with columns for DATE, NAME, and a 'VIEW ALL CLINICAL DOCUMENTS' link. The 'ENCOUNTERS' portlet shows a table with columns for START DATE, DIAGNOSIS, and a 'VIEW ALL ENCOUNTERS' link. The 'LABORATORY' portlet shows a table with columns for COMPLETED DATE, NAME, and a 'VIEW ALL LABORATORY' link. The 'RADIOLOGY' portlet shows a table with columns for COMPLETED DATE, NAME, and a 'VIEW ALL RADIOLOGY' link. The 'PATHOLOGY' portlet shows a table with columns for COMPLETED DATE, NAME, and a 'VIEW ALL PATHOLOGY' link. The 'TRANSCRIBED REPORTS' portlet shows a table with columns for COMPLETED DATE, NAME, and a 'VIEW ALL TRANSCRIBED REPORTS' link. The 'UNCATEGORIZED' portlet shows a message 'There is no data to be displayed'. The 'IMMUNIZATIONS' portlet shows a table with columns for DATE, NAME, and a 'VIEW ALL IMMUNIZATIONS' link. Below the portlets, there are buttons for PROBLEMS, PROCEDURES, MEDICATIONS, and ALLERGIES.

The **Medications & Allergies** tab contains the patient's medication list and known allergies.

2. Click **Medications** to review the *Medication History*.

The screenshot shows the 'Medications & Allergies' tab selected in the top navigation bar. Below the navigation bar, there is a 'DATE SELECTION' section with radio buttons for 3 months, 6 months, 9 months, 12 months (selected), and Custom. A 'Retrieve' button is to the right. Below this, a red box highlights the 'MEDICATIONS' section, which contains a 'MEDICATION HISTORY' table. The table has columns for MEDICATION, PRESCRIBED BY, and DETAILS. The table lists 14 items, including Insulin Glargine, Metoprolol Succinate, Axa/Calcium Carb/Mag/Al Hydrex, Acorvastatin Calcium, and Valartan. Each item has a 'View More' link. Below the table, there is a pagination bar with 'First', 'Back', '1', '2', '3', 'Next', and 'Last' buttons. A 'Maximum 5 entries per page' label is also present.

3. Click **Allergies** to review the *Allergies History*.

The screenshot shows the patient record for Bobby Brady, a 50-year-old male. The 'Allergies' tab is highlighted in the top navigation bar. Below the tabs, the 'ALLERGIES HISTORY' section is visible, showing a table with columns: DATE, ALLERGY, REACTION, CRITICALITY, and RECORDED BY. The table contains three entries: abametapirabemetapir, morphinemorphine, and broccoli/brussels. A red box highlights the 'ALLERGIES' tab in the navigation bar.

The **Clinical Documents** tab contains all available Continuity of Care Documents (CCDs) and other clinical summaries such as hospital admission & discharge summaries and office visit summaries.

- The **KHIE Summary CCD** represents a consolidation of most all data available on a patient all in one place for a 'one-click' quick access to a patient's health history.
- The **Medicaid Claims Data CCD** represents all of the claims paid on behalf of a Medicaid patient.

4. Click **Clinical Documents** to see a list of all *Clinical Documents*.

The screenshot shows the patient record for Bobby Brady, a 50-year-old male. The 'Clinical Documents' tab is highlighted in the top navigation bar. Below the tabs, the 'CLINICAL DOCUMENTS' section is visible. On the left, there is a list of 'AVAILABLE DOCUMENTS' with a search filter. The list includes documents such as '04/15/2021 KHIE Summary CCD 5:24:05 am' and '04/15/2021 KHIE Medicaid CCD 5:24:06 am'. On the right, the 'KHIE SUMMARY CCD 5:24:05 AM' is displayed, showing a 'Show Table of Contents' button and a 'KHIE Patient Summary' section. A red box highlights the 'AVAILABLE DOCUMENTS' list on the left.

5. Select a **Document Name** from the *Available Documents* list located on the left side.
6. Click **Show Table of Content** to view the document's *Table of Contents*.

The screenshot shows the Patient Search interface for Bobby Brady. The 'AVAILABLE DOCUMENTS' list on the left includes several documents, with '04/15/2021 KHIE Summary CCD 5:24:05 am' highlighted. The main area displays the 'KHIE SUMMARY CCD 5:24:05 am' document. A red box highlights the document name in the list, and another red box highlights the 'Show Table of Content' button.

The screenshot shows the 'Table of Contents' section for the selected document. A red box highlights the 'Table of Contents' header and the list of sections: Encounters, Allergies, Medications, Problem, Functional, Social, Vital, Results, Immunizations, and Procedures.

7. Select a **Section Header** to navigate to that section of the document.

The screenshot shows the 'Table of Contents' section for the selected document. A red box highlights the 'Table of Contents' header and the list of sections: Encounters, Allergies, Medications, Problem, Functional, Social, Vital, Results, Immunizations, and Procedures.

8. Select **Back to Top** to navigate back to that document's table of contents.

The screenshot shows the 'AVAILABLE DOCUMENTS' sidebar on the left with a list of documents. The main content area displays the 'Table of Contents' for a selected document, listing sections like Encounters, Allergies, Medications, Problem, Functional, Social, Vital, Results, Immunizations, and Procedures. Below this is the 'Encounters' table:

Date	Diagnosis	Clinician	Location	Provider	Source
04/14/2021	Pediatric by Chosen		UKHC		University Of Kentucky Chandler Medical Center
04/14/2021	Pediatric by Chosen		UKHC		University Of Kentucky Chandler Medical Center
04/12/2021	Pediatric by Chosen		UKHC		University Of Kentucky Chandler Medical Center

A red box highlights the 'Back to Top' button in the top right corner of the document view.

9. Any document with the **Mail Icon** visible can be sent securely via Direct Secure Messaging. To send the document, click the **Mail Icon**.

The screenshot shows the patient summary for BOBBY BRADY. The 'CLINICAL DOCUMENTS' tab is active, displaying a list of documents. A red box highlights the 'Mail Icon' (an envelope with a key) next to the document 'KHIE SUMMARY CCD 5:24:05 AM'. Below the document list is the 'KHIE Patient Summary' section, which includes patient information like name, date of birth, sex, and address.

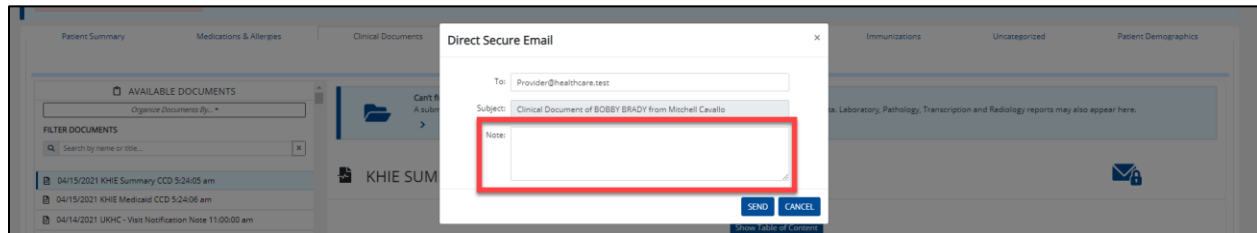
10. Enter the **Direct Secure Email Address** of the intended recipient(s).

The screenshot shows the 'Direct Secure Email' dialog box overlaid on the patient summary. The 'To:' field is highlighted with a red box and contains the email address 'Provider@healthcare.test'. The 'Subject:' field contains 'Clinical Document of BOBBY BRADY from Mitchell Cavella'. The 'Note:' field is empty. The 'SEND' and 'CANCEL' buttons are at the bottom right of the dialog.

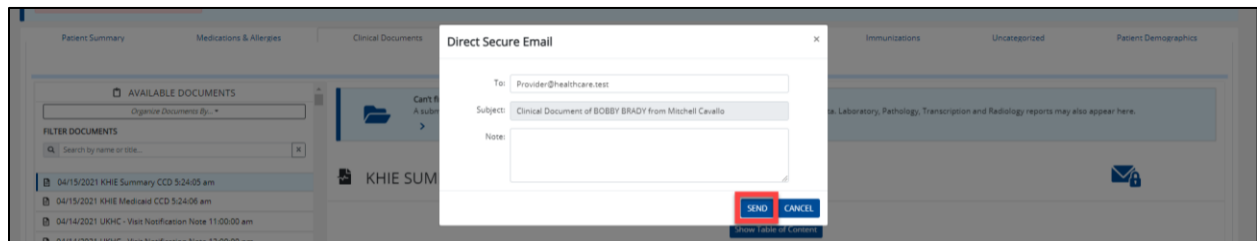


**Please Note:** To send to multiple addresses at once, Users must separate individual email addresses with a semi-colon. The sender isn't required to have a direct secure email address BUT the recipient is.

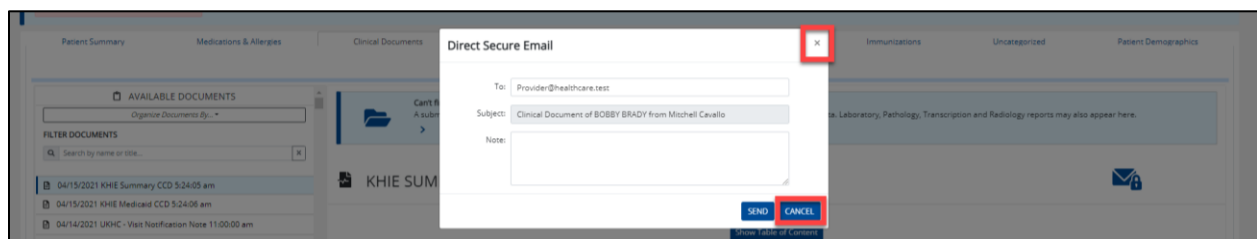
11. Enter a **Note** describing the contents and purpose of the Direct Secure Email.



12. Click **Send** to send the Direct Secure Email to recipient(s).



13. Click **Cancel** or click the **X** in the top right to exit the Direct Secure Email pop-up and discard the Direct Secure Email.



The **Laboratory & Pathology** tab contains a list of the laboratory and pathology result reports.

14. Click **Laboratory & Pathology** to open the Tab and review the **Laboratory & Pathology** reports.

15. Click **Laboratory** to review Laboratory result reports.

The screenshot shows the ePartnerViewer interface for patient BOBBY BRADY. The 'LABORATORY' tab is selected in the top navigation bar. The 'AVAILABLE DOCUMENTS' list on the left includes '12/04/2020 SARS coronavirus 2 RNA [Presence] 12:00:00 am'. The main content area displays 'SARS CORONAVIRUS 2 RNA [PRESENCE]' with a table showing the result.

FLAG	NAME	VALUE	UNIT	REFERENCE RANGES	RESULT
⚠	SARS coronavirus 2 RNA [Presence]	DETECTED		NOT DETECTED	Abnormal

16. To review a Laboratory report in its entirety, select a result report from the **Available Documents** on the left side. The report will open on the right side.

The screenshot shows the ePartnerViewer interface for patient BOBBY BRADY. The 'AVAILABLE DOCUMENTS' list on the left includes '12/04/2020 SARS coronavirus 2 RNA [Presence] 12:00:00 am'. The main content area displays 'SARS CORONAVIRUS 2 RNA [PRESENCE]' with a table showing the result.

FLAG	NAME	VALUE	UNIT	REFERENCE RANGES	RESULT
⚠	SARS coronavirus 2 RNA [Presence]	DETECTED		NOT DETECTED	Abnormal

The screenshot shows the ePartnerViewer interface for patient BOBBY BRADY. The 'AVAILABLE DOCUMENTS' list on the left includes '12/04/2020 SARS coronavirus 2 RNA [Presence] 12:00:00 am'. The main content area displays 'SARS CORONAVIRUS 2 RNA [PRESENCE]' with a table showing the result.

FLAG	NAME	VALUE	UNIT	REFERENCE RANGES	RESULT
⚠	SARS coronavirus 2 RNA [Presence]	DETECTED		NOT DETECTED	Abnormal

17. Click **Pathology** to review the Pathology reports.

The screenshot displays the ePartnerViewer interface for patient Bobby Brady. The top navigation bar includes links for Patient Search, Bookmarked Patients, Event Notifications, Secure Messaging, and Support. The patient's profile shows they are 50 years old, born on July 12, 1970, and live at 1234 TEST ST LEXINGTON KY 40137. A 'DATE SELECTION' bar allows filtering by 3, 6, 9, 12 months, or custom, with a 'Retrieve' button. Below this, a series of tabs represent different data categories: Patient Summary, Medications & Allergies, Clinical Documents, Laboratory & Pathology, Reports, Encounters, Immunizations, Uncategorized, and Patient Demographics. The 'LABORATORY' section is active, and within it, the 'PATHOLOGY' tab is highlighted with a red rectangle. On the left, an 'AVAILABLE DOCUMENTS' sidebar lists three X-ray reports from 2019 and 2020. The main content area shows details for an 'XR PELVIS' report, including the ordering physician (Freeman Morgan), observation date (Dec 04, 2020), and a descriptive text about a third trimester placenta.

**Patient Search**   **Bookmarked Patients**   **Event Notifications**   **Secure Messaging**   **Support**

Home > Patient search > BOBBY BRADY

**50** years old   **BRADY, BOBBY**   DOB: Jul 12 1970   Sex: M   Address: 1234 TEST ST LEXINGTON KY 40137   Bookmarked   View More

**DATE SELECTION**   3 months   6 months   9 months   12 months   Custom   Retrieve

Showing Data for Apr 16 2020 to Apr 15 2021

Patient Summary   Medications & Allergies   Clinical Documents   Laboratory & Pathology   Reports   Encounters   Immunizations   Uncategorized   Patient Demographics

**LABORATORY**   **PATHOLOGY**

**AVAILABLE DOCUMENTS**

Organize Documents By: ▾

**FILTER DOCUMENTS**

Search by name or title...

- 12/04/2020 XR PELVIS 5:34:38 am
- 12/03/2020 XR HIP 5:34:38 am
- 12/30/2019 XR HIP 5:34:38 am

**XR PELVIS**   APPLY FILTER

ORDERING PHYSICIAN: FREEMAN MORGAN   OBSERVATION DATE: DEC 04 2020   TIME OBTAINED: 05:34

HEMATOKYLIN + EOSIN STAIN  
RUN TIME: 1527

Third trimester placenta (364 g) with unremarkable three-vessel umbilical cord, membranes and villous tissues.

18. To review a Pathology report in its entirety, select a Pathology report from the **Available Documents** on the left side. The report will open on the right side.

The screenshot shows the ePartnerViewer interface with the 'Pathology' tab selected. On the left, the 'AVAILABLE DOCUMENTS' panel is highlighted with a red box, showing a list of documents including '12/04/2020 XR PELVIS 5:34:38 am'. The main content area displays the 'XR PELVIS' report, including the ordering physician (FREEMAN MORGAN), observation date (12/04/2020), and time obtained (5:34 AM). The report text describes a third trimester placenta (364 g) with unremarkable three-vessel umbilical cord, membranes and villous tissues.

The **Reports** tab contains **Radiology Reports**, **Other Transcribed Reports**, and **Images**.

19. Click **Reports** to open the **Reports Tab** to view all reports.

The screenshot shows the ePartnerViewer interface with the 'Reports' tab selected. The 'Reports' tab is highlighted with a red box. The main content area displays the 'RADTESTING IMAGING EXTRA' report, including the ordering physician (ALJ JESSEE), observation date (FEB 27 2021), and time obtained (05:34). The report text describes a CTA CHEST WIPE PROTOCOL Imaging Test.

20. To review radiology reports, click **Radiology Reports**.

The screenshot shows the ePartnerViewer interface with the 'Radiology Reports' tab selected. The 'Radiology Reports' tab is highlighted with a red box. The main content area displays the 'RADTESTING IMAGING EXTRA' report, including the ordering physician (ALJ JESSEE), observation date (FEB 27 2021), and time obtained (05:34). The report text describes a CTA CHEST WIPE PROTOCOL Imaging Test.

21. To review a transcribed Radiology Report in its entirety, select a radiology report from the **Available Documents** on the left side. The report will open on the right side.

The screenshot shows the ePartnerViewer interface with the 'RADIOLOGY REPORTS' tab selected. On the left, the 'AVAILABLE DOCUMENTS' section is highlighted with a red box. It contains a search bar and a list of three reports: '02/27/2021 RadTesting Imaging extra 5:34:38 am', '12/04/2020 XRAY CHEST 2 VIEW 5:34:38 am', and '12/04/2020 XRAY LEG 4:09:00 pm'. The main content area displays the details of the selected report, 'RADTESTING IMAGING EXTRA', including the ordering physician (ALJESSEE), observation date (02/27/2021), and time obtained (5:34 AM). The report title is 'CTA CHEST W/PE PROTOCOL Imaging Test' and the patient name is 'CZHKCKYXA TD'.

22. Click **Other Transcribed Reports** to review other types of transcribed reports.

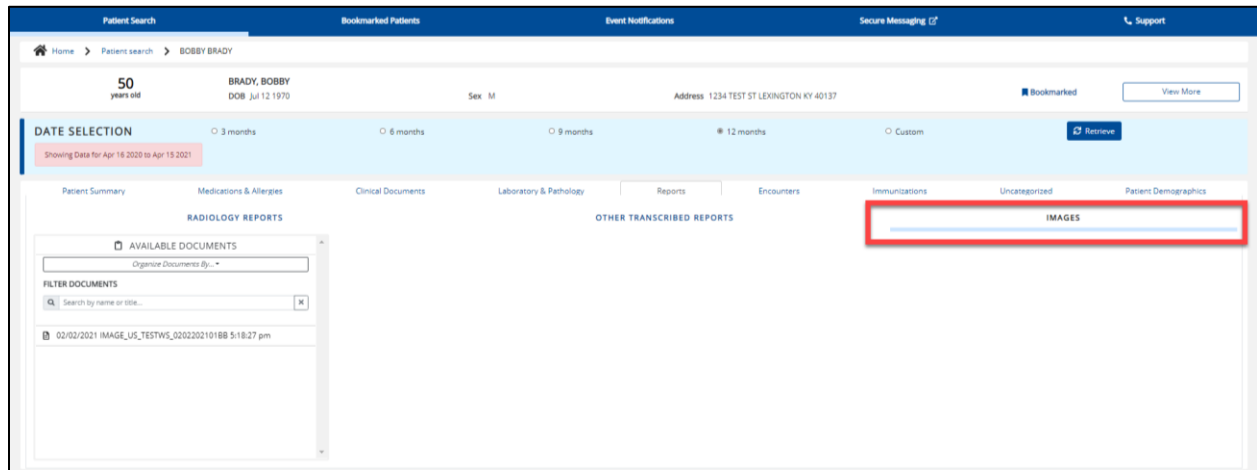
The screenshot shows the ePartnerViewer interface with the 'OTHER TRANSCRIBED REPORTS' tab selected. On the left, the 'AVAILABLE DOCUMENTS' section is highlighted with a red box. It contains a search bar and a list of two reports: '12/04/2020 History 4:51:46 am' and '12/04/2020 Allergic rhinitis 10:51:46 am'. The main content area displays the details of the selected report, 'HISTORY', including the ordering physician (S TESTDR), observation date (DEC 04 2020), and time obtained (04:51). The report title is 'TRANSCRIPTION NOTE 11-15-2020 Thu' and the patient name is 'CZHKCKYXA TD'.

23. To review a Transcribed Report in its entirety, select a report from the **Available Documents** on the left side. The report will open on the right side.

The screenshot shows the ePartnerViewer interface with the 'OTHER TRANSCRIBED REPORTS' tab selected. On the left, the 'AVAILABLE DOCUMENTS' section is highlighted with a red box. It contains a search bar and a list of two reports: '12/04/2020 History 4:51:46 am' and '12/04/2020 Allergic rhinitis 10:51:46 am'. The main content area displays the details of the selected report, 'HISTORY', including the ordering physician (S TESTDR), observation date (12/04/2020), and time obtained (4:51 AM). The report title is 'TRANSCRIPTION NOTE 11-15-2020 Thu' and the patient name is 'CZHKCKYXA TD'.



24. Click **Images** to view images.



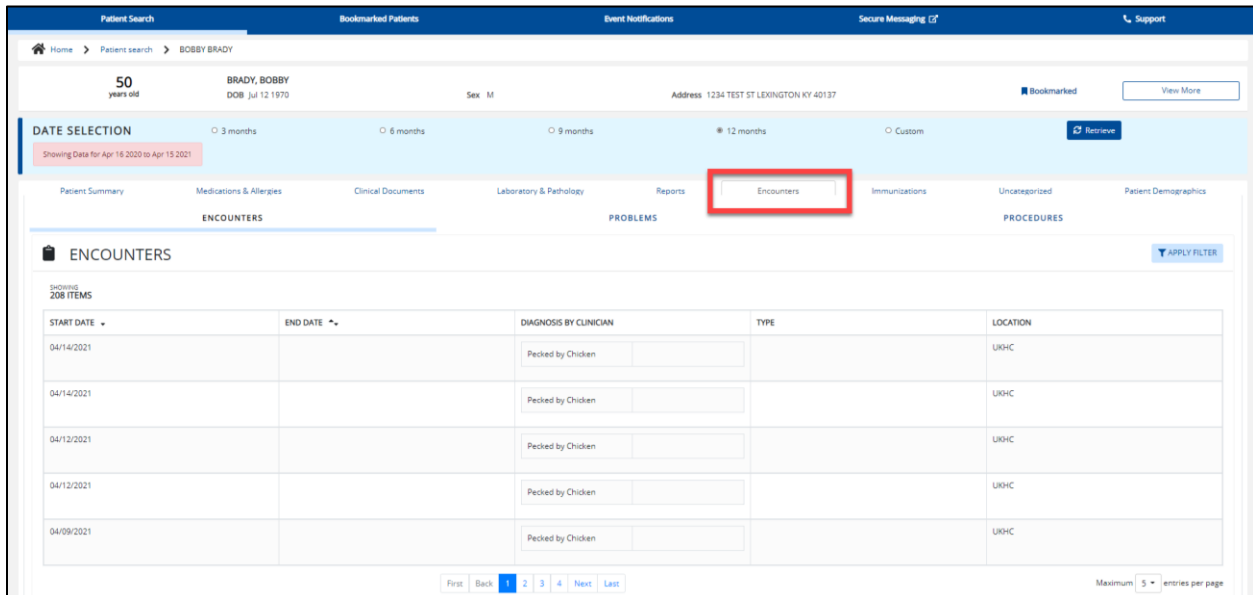
25. To review an Image, select an image document from the **Available Documents** on the left side. The report will open on the right side. Viewing and Exporting Images is covered in section 10.



**Please Note:** Section 10 Viewing and Exporting Radiology Images covers the ePartnerViewer's imaging features in more detail.

The **Encounters** tab contains the patient's list of **Encounters**, **Problems**, and **Procedures** history.

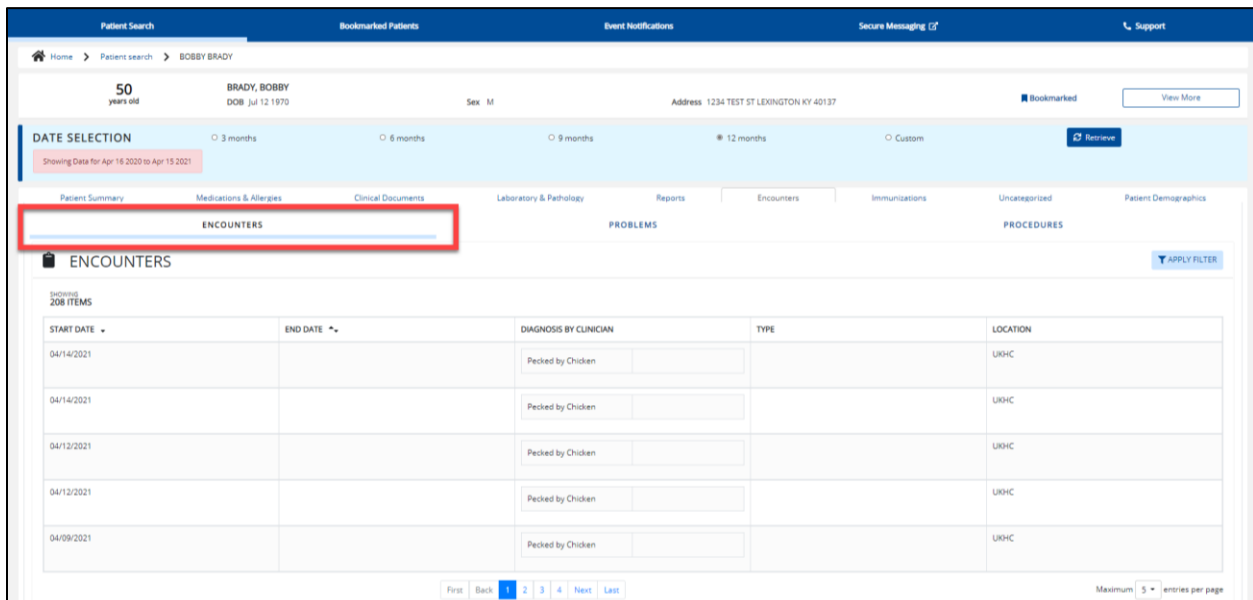
26. Click **Encounters** to open the **Encounters Tab** to review all reports.



The screenshot shows the ePartnerViewer interface for patient BOBBY BRADY. The 'Encounters' tab is highlighted with a red box in the navigation bar. Below the navigation bar, the 'ENCOUNTERS' section is visible, showing a table of encounter data. The table has columns for START DATE, END DATE, DIAGNOSIS BY CLINICIAN, TYPE, and LOCATION. The data shows five encounters, all dated 04/14/2021, with the diagnosis 'Pecked by Chicken' and location 'UKHC'. The table is paginated, showing 208 items, with the first page displayed.

START DATE	END DATE	DIAGNOSIS BY CLINICIAN	TYPE	LOCATION
04/14/2021		Pecked by Chicken		UKHC
04/14/2021		Pecked by Chicken		UKHC
04/12/2021		Pecked by Chicken		UKHC
04/12/2021		Pecked by Chicken		UKHC
04/09/2021		Pecked by Chicken		UKHC

27. Click **Encounters** to review the Encounters history.



The screenshot shows the ePartnerViewer interface for patient BOBBY BRADY. The 'Encounters' tab is highlighted with a red box in the navigation bar. Below the navigation bar, the 'ENCOUNTERS' section is visible, showing a table of encounter data. The table has columns for START DATE, END DATE, DIAGNOSIS BY CLINICIAN, TYPE, and LOCATION. The data shows five encounters, all dated 04/14/2021, with the diagnosis 'Pecked by Chicken' and location 'UKHC'. The table is paginated, showing 208 items, with the first page displayed.

START DATE	END DATE	DIAGNOSIS BY CLINICIAN	TYPE	LOCATION
04/14/2021		Pecked by Chicken		UKHC
04/14/2021		Pecked by Chicken		UKHC
04/12/2021		Pecked by Chicken		UKHC
04/12/2021		Pecked by Chicken		UKHC
04/09/2021		Pecked by Chicken		UKHC



28. Click **Problems** to review the Problems History.

29. Click **Procedures** to review the Procedure History.

DATE	NAME	CODE	NOTE
12/08/2020	Appendectomy/Appendectomy	80146002	
05/11/2020	386053000	386053000	
05/11/2020	392230005	392230005	
05/11/2020	268400002	268400002	

The **Immunizations** tab contains the patient's immunization history.

30. Click **Immunizations** to review the Immunization History.

DATE	NAME	PROVIDER	DETAILS
			View More
			View More
04/15/2021	No Vaccine Administered		View More
01/28/2020	Meningococcal MPSV4		View More

The **Uncategorized** tab stores the Laboratory, Radiology, Pathology, and Transcription documents that came to us named in a way that our system could not categorize them appropriately. These documents contain important health information and are made available to you to review here.

31. Click **Uncategorized** to review the Uncategorized documents.

The screenshot shows the ePartnerViewer interface for patient BOBBY BRADY. The top navigation bar includes tabs for Patient Search, Bookmarked Patients, Event Notifications, Secure Messaging, and Support. The 'Uncategorized' tab is highlighted in the top navigation bar. The left sidebar shows 'AVAILABLE DOCUMENTS' with a list of three uncategorized lab reports. The main content area displays 'UNCATEGORIZED LAB FIRST' with a table of lab results.

FLAG	NAME	VALUE	UNIT	REFERENCE RANGES	RESULT
	Protein [Mass/volume] in Serum or Plasma	8.1		6.4 TO 8.2	
	Bilirubin:total [Mass/volume] in Serum or Plasma	0.7		0.4 TO 1.5	

32. To review an Uncategorized report in its entirety, select a report from the **Available Documents** on the left side. The report will open on the right side.

The screenshot shows the ePartnerViewer interface for patient BOBBY BRADY. The top navigation bar includes tabs for Patient Search, Bookmarked Patients, Event Notifications, Secure Messaging, and Support. The 'Uncategorized' tab is highlighted in the top navigation bar. The left sidebar shows 'AVAILABLE DOCUMENTS' with a list of three uncategorized lab reports. The main content area displays 'UNCATEGORIZED LAB FIRST' with a table of lab results.

FLAG	NAME	VALUE	UNIT	REFERENCE RANGES	RESULT
	Protein [Mass/volume] in Serum or Plasma	8.1		6.4 TO 8.2	
	Bilirubin:total [Mass/volume] in Serum or Plasma	0.7		0.4 TO 1.5	

The **Patient Demographics** tab contains patient information such as next of kin, diagnosis information, insurance information, and, when available, will include the patient's extreme drug-resistant organism (XDRO) status. The default date selection is 12 months. You can enter a custom *Start* and *End* date BUT it cannot be greater than 12 months.

33. Click **Patient Demographics** to view the **Patient Demographics**.

The screenshot shows the Patient Demographics tab selected. The patient information at the top includes: 50 years old, BRADY, BOBBY, DOB Jul 12 1970, Sex M, Address 1234 TEST ST LEXINGTON KY 40137. The DATE SELECTION section shows 12 months selected. The MRN drop-down menu is open, showing a list of MRNs. The Patient Demographics tab is highlighted with a red box.

34. Select an **MRN** from the **MRN** drop-down menu.

The screenshot shows the Patient Demographics tab with the MRN drop-down menu open. The menu lists several MRNs, including 12344444 - UKHC, M0000764 - BCKDM\_IHE, MA3287345 - TESTWS, H20200319001 - SCRMCMEDPAV, M0000808 - BCKMIAMBULATORY\_IHE, M00000790 - TAYLORHOSP\_IHE, and 00799691 - OWENSBORO\_IHE. The MRN 12344444 - UKHC is selected.

35. Click **Retrieve** to generate the list of *Available Transactions*.

The screenshot shows the Patient Demographics tab with the MRN 12344444 - UKHC selected. The Retrieve button is highlighted with a red box.

36. To review the demographic data, select a **Transaction** from the *list of Available Transactions*.

The screenshot shows the Patient Demographics tab with the list of Available Transactions displayed. The first transaction is selected: 2020-05-01 15:00:00.000000 12344444 - UKHC. The transaction details are shown on the right, including Patient Visit, Patient Class, Admission Type, Referring Doctor, Attending Doctor, Admit Date Time, Discharge Date Time, and Diagnosis.

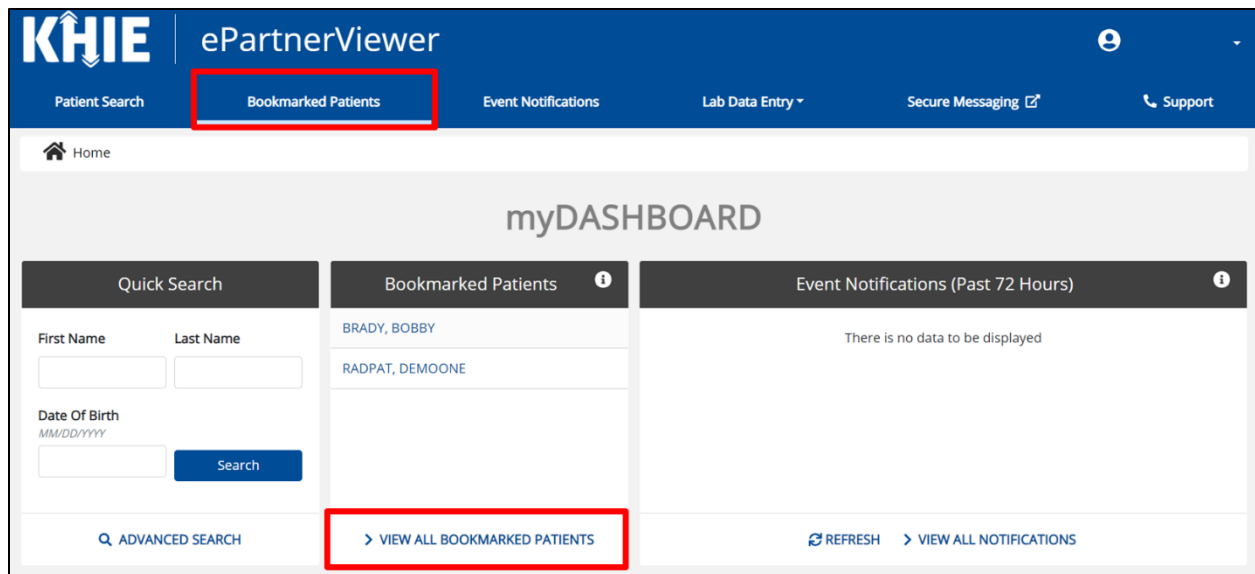
## 9 Bookmarking a Patient

**Bookmarked Patients** is a list of patients users have elected to favorite or bookmark to enable quick and easy access in the future. Bookmarks allow you to easily navigate to a specific patient chart you may need to review on a frequent basis.

### Reviewing Bookmarked Patients

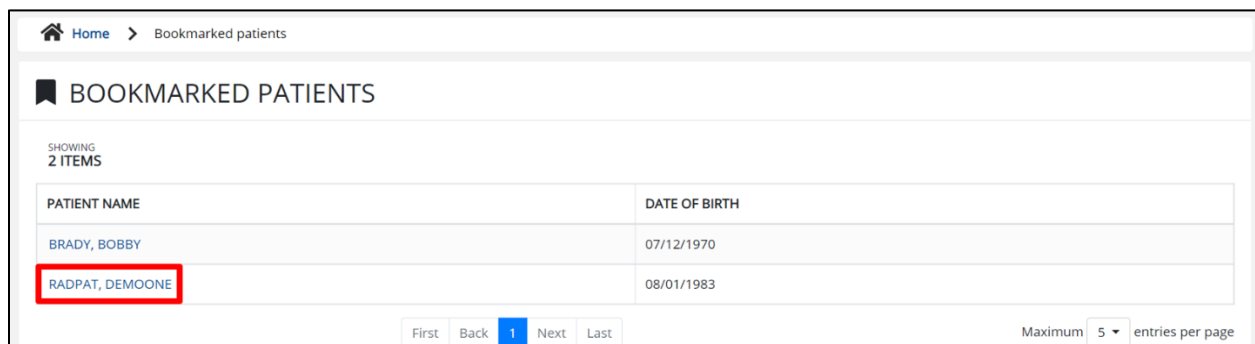
Users can access Bookmarked Patients from the *Navigation Bar* or from myDASHBOARD.

1. From myDASHBOARD, you will see up to five of your bookmarked patients; you can click **View All Bookmarked Patients** to see the entire list of patients you've bookmarked. Bookmarked Patients are listed in chronological order not in alphabetical order.




**Please Note:** From within the patient chart, Users can click Bookmarked Patients in the *Navigation Ribbon* to view the list of **Bookmarked Patients**.

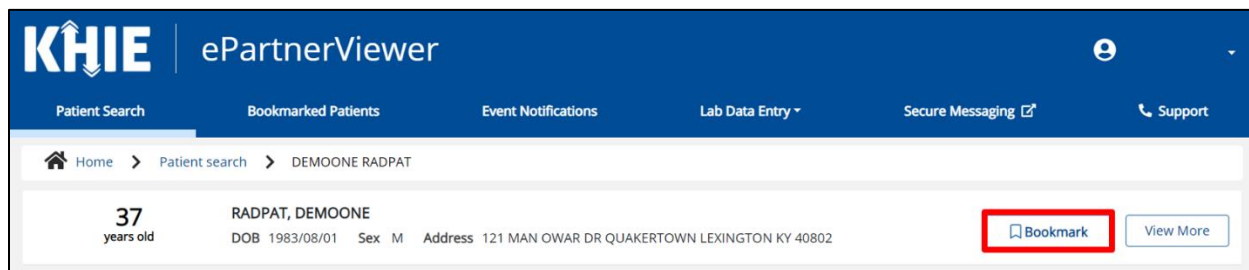
2. Click the **Patient Name** hyperlink to open the patient's chart.



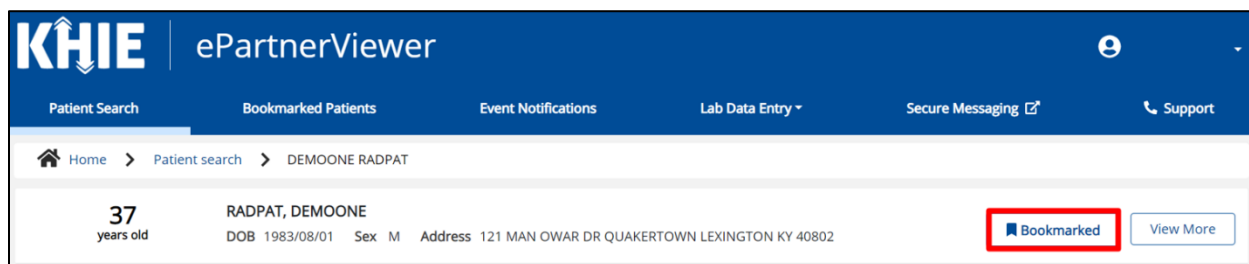
PATIENT NAME	DATE OF BIRTH
BRADY, BOBBY	07/12/1970
RADPAT, DEMOONE	08/01/1983

## Adding Bookmarks


1. To bookmark a patient, you must be in the patient chart to select the **Bookmark Icon**  located within the patient header.

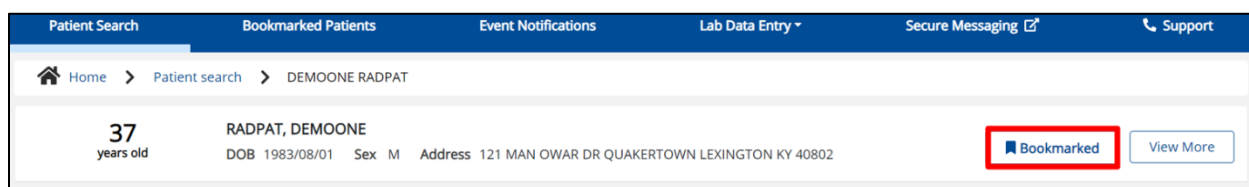


2. The **Bookmark Icon** changes from *light to dark* and displays the text *Bookmarked* to indicate the patient has been added to **Bookmarked Patients**.

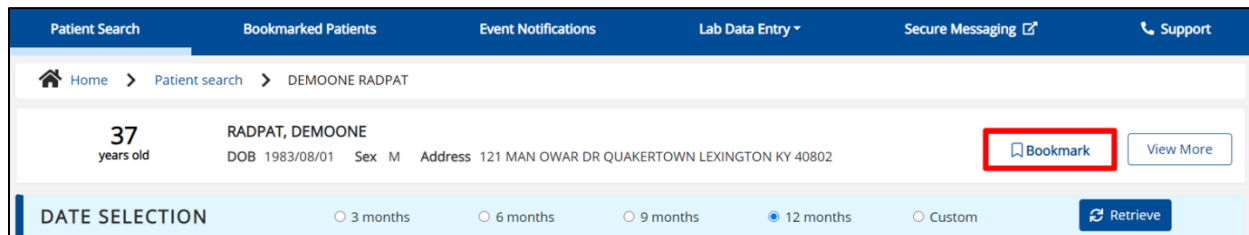


## Removing Bookmarks

1. To remove a bookmark, you must be in the patient chart to click the **Bookmark Icon**  located within the patient header.



2. The **Bookmark Icon** changes from *dark to light* and displays the text *Bookmark* to indicate the patient is no longer in **Bookmarked Patients**.





## 10 Viewing and Exporting Radiology Images

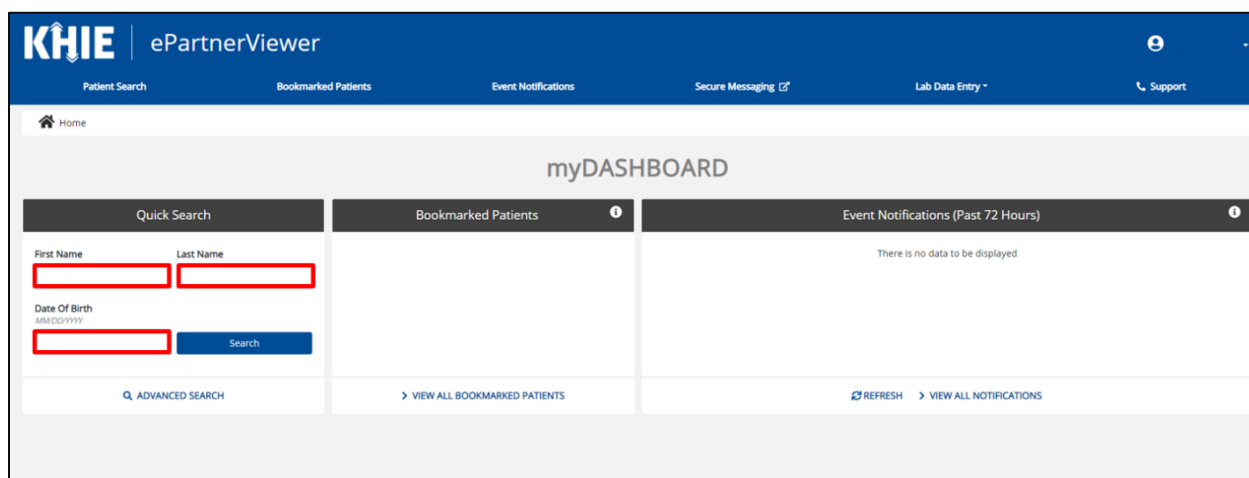
Users with one of the *Clinical User* roles are authorized to view low resolution images in the ePartnerViewer. Users with a *Clinical User* role and the *PACS Administrator* role can export images to their local Picture Archiving and Communications Systems (PACS) to view in high resolution.

**Please Note:** Users with a *Clinical User* role can view images but **cannot** export images without also having the *PACS Administrator* role.  
Images in the ePartnerViewer are not in high resolution and are not intended for diagnostic

### Viewing Images in the ePartnerViewer

Users with a *Clinical User* Role are authorized to search for patients and view low resolution images within the ePartnerViewer.

1. From myDASHBOARD, search for a patient by entering the patient's **First Name**, **Last Name**, and **Date of Birth**.



**Please Note:** Users should enter the patient's **Date of Birth** to narrow down the patient match results in the event there are multiple patients with the same first and last names.

When the patient's Date of Birth is unknown, Users can click on **Advanced Search** to provide the patient's **Age Range**.

When the patient's Sex is known, Users can select the **Patient Sex**.

2. Click **Search**.

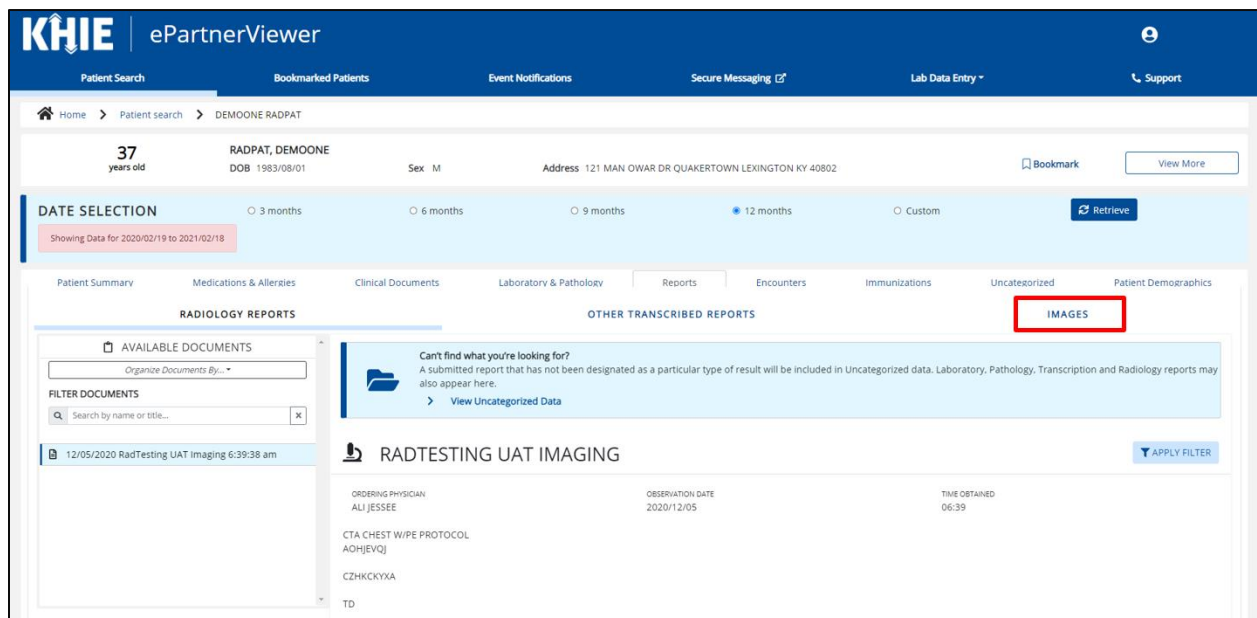
3. The Patient Search results display. Select the appropriate **Patient Match**.

4. Click **View** to open the patient chart. It will open in the Patient Summary.

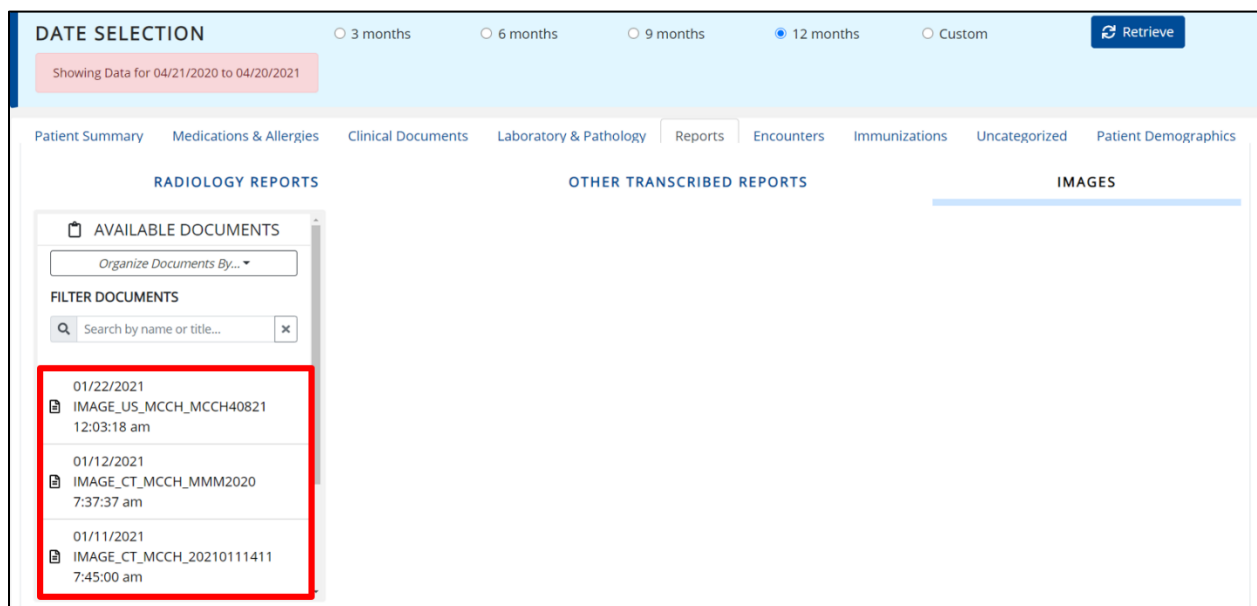
5. To view images, click the **Reports** tab.



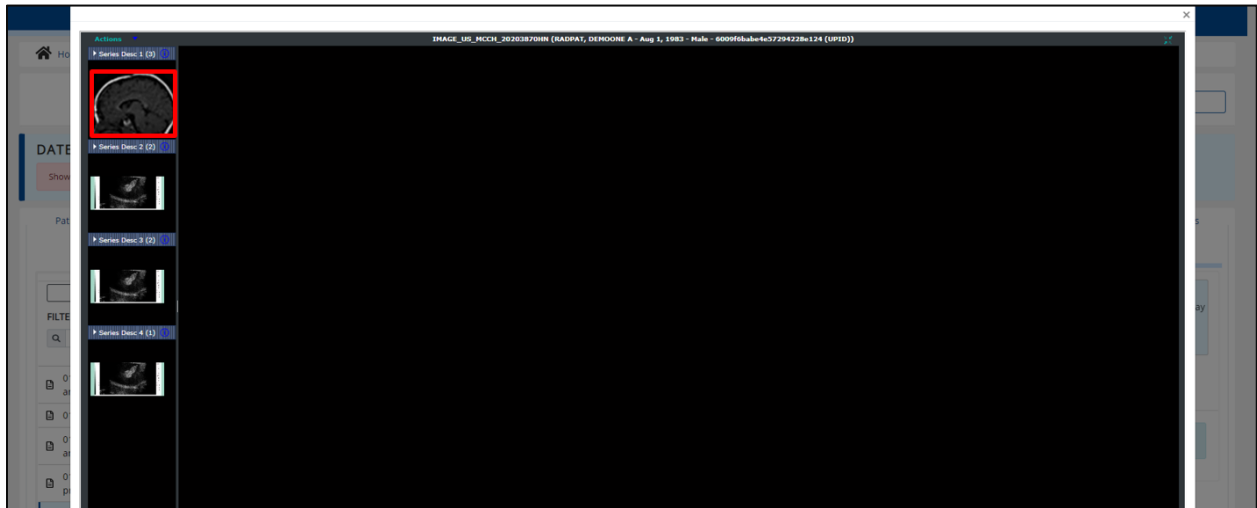
6. Click the **Images** tab.



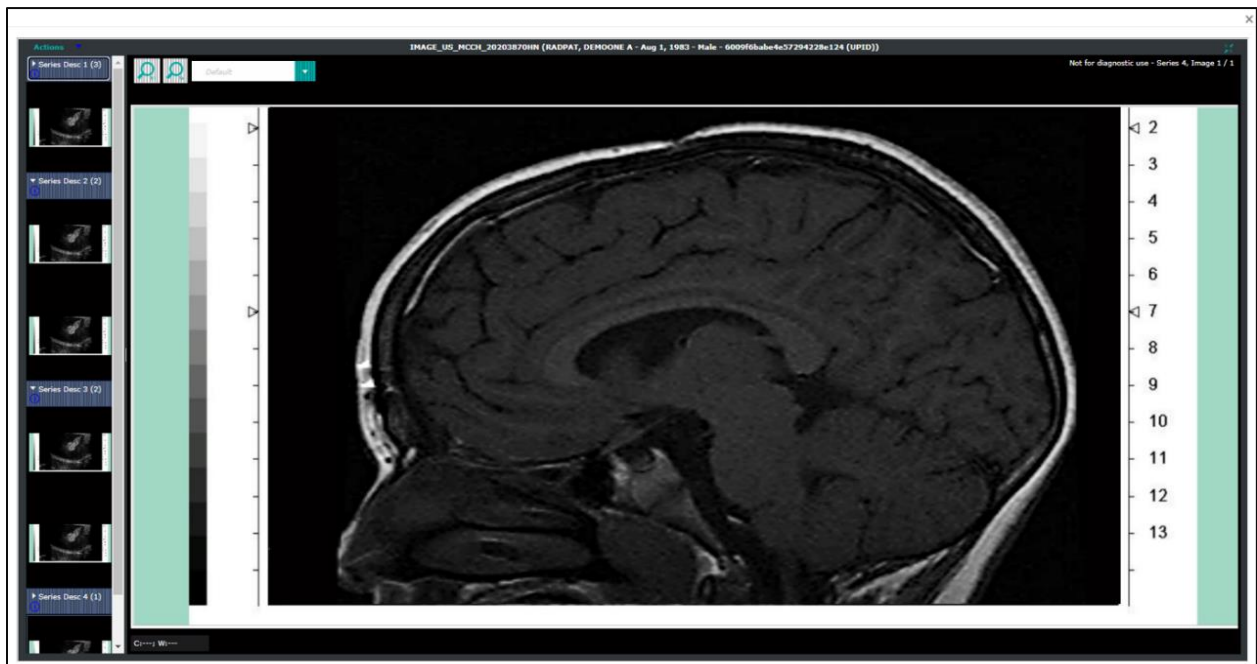
7. To view an image preview, select the **desired image report** from the list of *Available Documents* located on the left side.



- The images display as thumbnail images. To view a larger version of an image, select the desired **thumbnail image**.



- A larger version of the image displays.



**Please Note:** The images viewed in the ePartnerViewer are low resolution images and are not intended for diagnostic purposes. To view high resolution images, Users with the *PACS Administrator* role must export images to their local Picture Archiving and Communications Systems (PACS). Users must have a *Clinical User* role and the *PACS Administrator* role to export

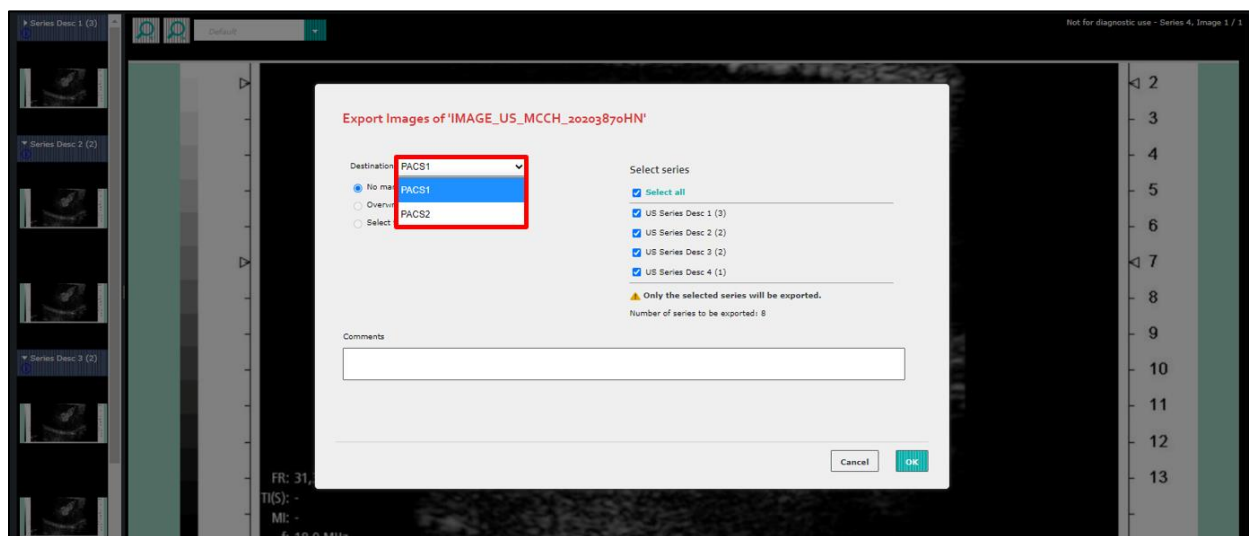
## Exporting Images

To view high-resolution images, Users must export images to their local Picture Archiving and Communications Systems (PACS) using DICOM or XCA-i. Only authorized Clinical Users with the *PACS Administrator* role have the option to export the image to a local PACS system.

1. To export a desired image to your local PACS system, complete steps 1 through 9 above and 1 through 8 below.
2. Click **Actions**. Under the **Actions** drop-down, click **Export**.



3. A Pop-up Menu displays. Select the **appropriate target PACS system** from the *Destination* field drop-down.



4. Select the **appropriate series** for exporting the image.

Destination: PACS1

☒ No manual modifications  
☐ Overwrite values  
☐ Select from worklist

Select series

- ☒ Select all
- ☒ US Series Desc 1 (3)
- ☒ US Series Desc 2 (2)
- ☒ US Series Desc 3 (2)
- ☒ US Series Desc 4 (1)

⚠ Only the selected series will be exported.  
Number of series to be exported: 8

Comments

Cancel OK

**Please Note:** By default, all series are selected. Users must de-select the **Select All** button, then select the appropriate series to export the image from a specific series.

5. If desired, enter **additional details** about the image in the *Comments* field.
6. Once complete, click **OK**.

Destination: PACS1

☒ No manual modifications  
☐ Overwrite values  
☐ Select from worklist

Select series

☐ Select all

☒ US Series Desc 1 (3)  
☒ US Series Desc 2 (2)  
☐ US Series Desc 3 (2)  
☐ US Series Desc 4 (1)

⚠ Only the selected series will be exported.  
Number of series to be exported: 5

Comments

Test

⚠ Please don't use sensitive information in your comment.

Cancel OK

7. The **Exports** screen displays the status and details of the image export. The green checkmark indicates that the image was successfully exported.

Date	Patient ID	Target	Priority	State	Total	Comments
Feb 18, 2021, 3:10:18 PM	6009f6babe4e57294228e124 (UPID)	PACS1		✓	5	
Feb 18, 2021, 11:53:36 AM	6009f6babe4e57294228e124 (UPID)	PACS1		✓	5	Test

8. Click the **Green Checkmark** to view additional details of the image export.

Date	Patient ID	Target	Priority	State	Total	Comments
Feb 18, 2021, 3:10:18 PM	6009f6babe4e57294228e124 (UPID)	PACS1		✓	5	
Feb 18, 2021, 11:53:36 AM	6009f6babe4e57294228e124 (UPID)	PACS1		✓	5	Test

Export Details

Stored 5

Found 0

Failed 0

Failure

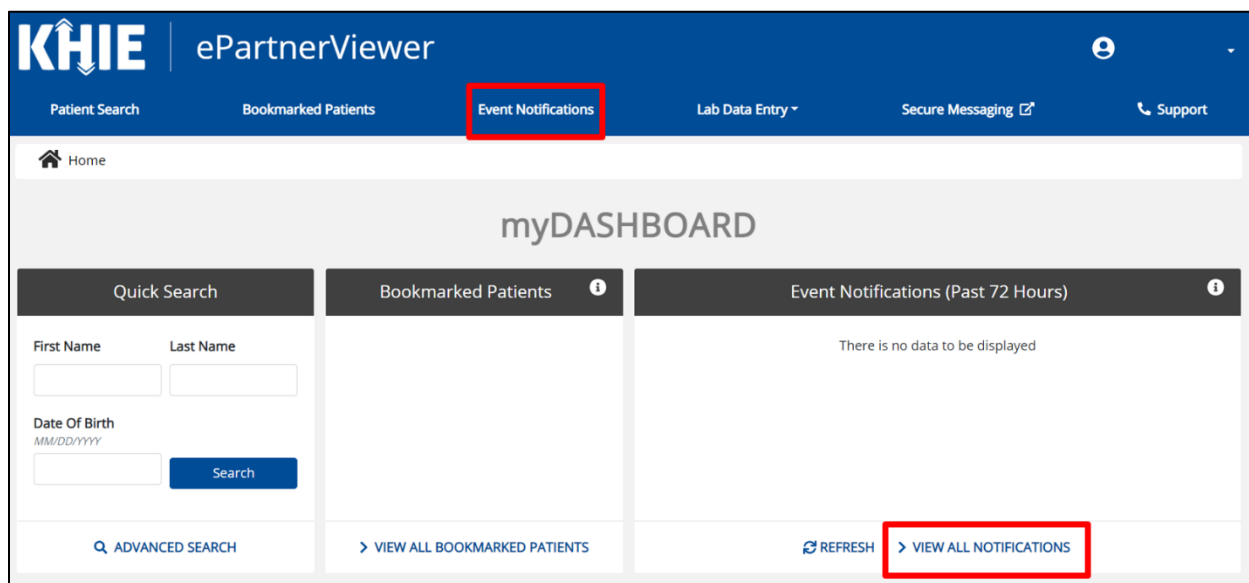
## 11 Reviewing and Managing Event Notifications

The Event Notifications feature enables healthcare providers to track high priority patients and informs providers of specific healthcare events which have occurred with specific patients in their care. Event Notifications are intended to improve care coordination as patients transition from various healthcare settings. For example, an event notification may be generated to inform a healthcare provider that a patient from his panel has been admitted to a hospital.

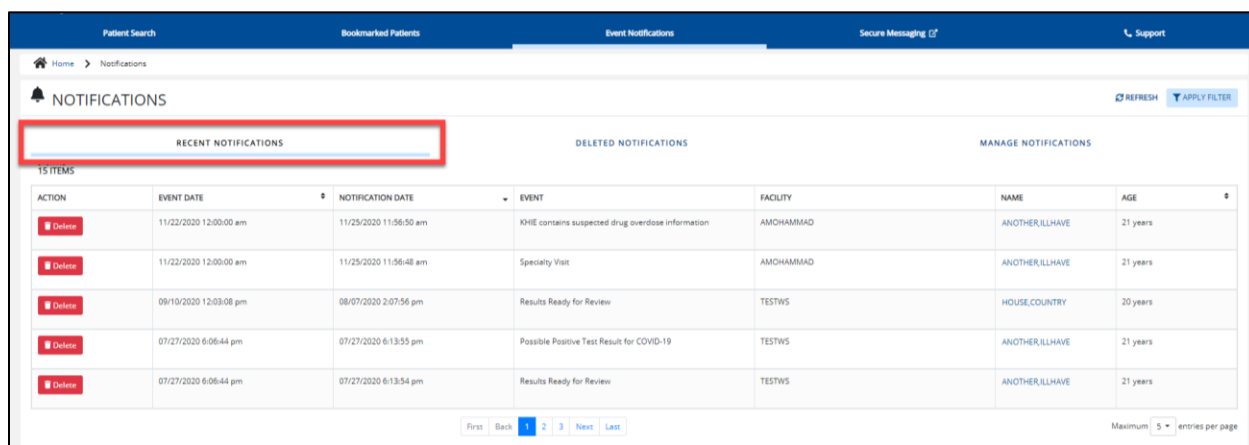
### Reviewing Event Notifications

myDASHBOARD offers a quick view of the most recent event notifications that have occurred with high priority patients.

1. To view Event Notifications, click **View All Event Notifications** from myDASHBOARD or click on the **Event Notifications** tab in the *Navigation Bar*.



2. Click **Recent Notifications** to review a list of recent event notifications.



- Click **Delete** to delete a notification.

The screenshot shows the 'Event Notifications' page with a table of recent notifications. The first row has a red box around the 'Delete' button. The table has columns: ACTION, EVENT DATE, NOTIFICATION DATE, EVENT, FACILITY, NAME, and AGE.

ACTION	EVENT DATE	NOTIFICATION DATE	EVENT	FACILITY	NAME	AGE
Delete	11/22/2020 12:00:00 am	11/25/2020 11:56:50 am	KHIE contains suspected drug overdose information	AMOHAMMAD	ANOTHER,ILLHAVE	21 years
Delete	11/22/2020 12:00:00 am	11/25/2020 11:56:48 am	Specialty Visit	AMOHAMMAD	ANOTHER,ILLHAVE	21 years
Delete	09/10/2020 12:03:08 pm	09/07/2020 2:07:56 pm	Results Ready for Review	TESTWS	HOUSE,COUNTRY	20 years
Delete	07/27/2020 6:06:44 pm	07/27/2020 6:13:55 pm	Possible Positive Test Result for COVID-19	TESTWS	ANOTHER,ILLHAVE	21 years
Delete	07/27/2020 6:06:44 pm	07/27/2020 6:13:54 pm	Results Ready for Review	TESTWS	ANOTHER,ILLHAVE	21 years

- Click **Deleted Notifications** to review all deleted notifications.

The screenshot shows the 'Event Notifications' page with the 'Deleted Notifications' tab selected. The table lists deleted notifications with columns: EVENT DATE, NOTIFICATION DATE, EVENT, FACILITY, NAME, and AGE.

EVENT DATE	NOTIFICATION DATE	EVENT	FACILITY	NAME	AGE
11/22/2020 12:00:00 am	11/25/2020 11:56:50 am	KHIE contains suspected drug overdose information	AMOHAMMAD	ANOTHER,ILLHAVE	21 years
04/01/2020 4:30:15 pm	04/01/2020 8:33:46 pm	Results Ready for Review	MCCH	ASHLAND,BILL E	43 years
03/31/2020 1:32:00 am	04/01/2020 6:18:52 pm	Hospital Admission	UKHC	ASHLAND,BILL E	43 years
01/22/2020 4:34:03 pm	04/01/2020 6:18:46 pm	Emergency Department Admission	MCCH	ASHLAND,BILL E	43 years
03/31/2020 1:32:00 am	04/01/2020 6:18:46 pm	Behavioral Health Admission	UKHC	ASHLAND,BILL E	43 years

## Managing Event Notifications

Users with a *Clinical* role can manage their own event notifications. They can add and delete patients and edit the types of event notifications they want to receive on their patients.

Users with the *Event Notification Administrator* role can manage event notifications for other Users in their organization.

- Click **Manage Notifications** to add and delete patients and edit the types of event notifications received.

The screenshot shows the 'Event Notifications' page with the 'Manage Notifications' tab selected. Below the tab, there is a section titled 'Select a User from the list' with a dropdown menu and a 'Retrieve' button.

2. To manage notifications for a User, select the **Name of the User** from the *Select a User from the List* drop-down.

The screenshot shows the 'NOTIFICATIONS' page with three tabs: 'RECENT NOTIFICATIONS', 'DELETED NOTIFICATIONS', and 'MANAGE NOTIFICATIONS'. The 'MANAGE NOTIFICATIONS' tab is active. A dark grey button labeled 'Select a User from the list' is shown. Below it, a dropdown menu is open, displaying a list of email addresses: 'Select...', 'Username.One@email.com', 'Username.Two@email.com', 'Username.Three@email.com', 'Username.Four@email.com', and 'Username.Five@email.com'. The dropdown is highlighted with a red rectangle. The footer includes 'HEALTHINTERACTIVE HIE' and 'Version: 1.0.0'.

3. Click **Retrieve** to display the *Selected User* and *Selected Patients*.

The screenshot shows the 'NOTIFICATIONS' page with the 'MANAGE NOTIFICATIONS' tab active. The 'Select a User from the list' button is shown, and below it, a dropdown menu displays 'Jane Doe (Jane.Doe@email.com)'. A red rectangle highlights the 'Retrieve' button. Below the dropdown, the 'Selected User:' section is visible, containing a table with columns for 'USER NAME', 'HOSPITAL ADMISSION', 'HOSPITAL DISCHARGE', 'EMERGENCY DEPARTMENT ADMISSION', 'EMERGENCY DEPARTMENT DISCHARGE', 'BEHAVIORAL HEALTH ADMISSION', and 'BEHAVIORAL HEALTH DISCHARGE'. The table has one row for 'Jane Doe (Jane.Doe@email.com)' with checkboxes in each column. Below the table is a scroll bar and a blue button labeled 'Edit Notification Type'. A red rectangle highlights a message at the bottom: 'To add notifications, please first select at least one Notification Type by clicking on the 'Edit Notification Type' button above.'

**Please Note:** If the User has not yet added any event notifications, only the *Selected User* section displays. Once the User clicks **Edit Notification Type** and adds at least one Notification Type, the **Add Patient** button is enabled and displays. Once the User adds patients, the *Selected Patients* section displays data.



The *Selected User* section displays the event notification types that are enabled for a selected user. You can add or delete the notifications that a Selected User receives.

Selected User:

USER NAME	HOSPITAL ADMISSION	HOSPITAL DISCHARGE	EMERGENCY DEPARTMENT ADMISSION	EMERGENCY DEPARTMENT DISCHARGE	BEHAVIORAL HEALTH ADMISSION	BEHAVIORAL HEALTH DISCHARGE
Jane Doe (Jane.Doe@email.com)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Edit Notification Type](#)

4. Click **Edit Notification Type** to activate the checkboxes.

Selected User:

USER NAME	HOSPITAL ADMISSION	HOSPITAL DISCHARGE	EMERGENCY DEPARTMENT ADMISSION	EMERGENCY DEPARTMENT DISCHARGE	BEHAVIORAL HEALTH ADMISSION	BEHAVIORAL HEALTH DISCHARGE
Jane Doe (Jane.Doe@email.com)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Edit Notification Type](#)

5. Click the **Checkboxes** to add or delete a notification.

Selected User:

USER NAME	HOSPITAL ADMISSION	HOSPITAL DISCHARGE	EMERGENCY DEPARTMENT ADMISSION	EMERGENCY DEPARTMENT DISCHARGE	BEHAVIORAL HEALTH ADMISSION	BEHAVIORAL HEALTH DISCHARGE
Jane Doe (Jane.Doe@email.com)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Save Notification Type](#) [Cancel](#)

6. To save the changes, click **Save Notification Type**.

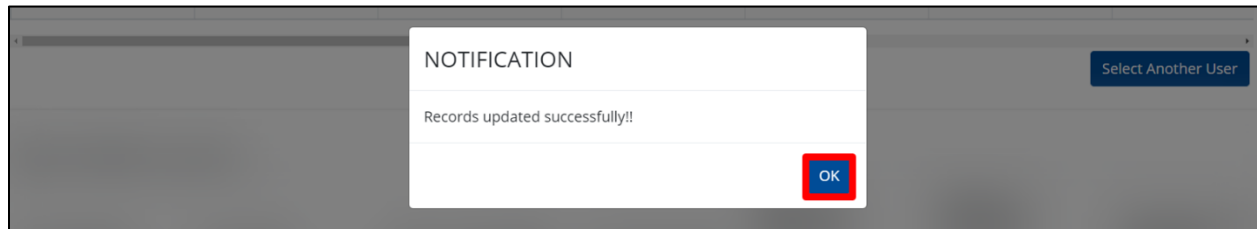
7. To discard the changes, click **Cancel**.

Selected User:

USER NAME	HOSPITAL ADMISSION	HOSPITAL DISCHARGE	EMERGENCY DEPARTMENT ADMISSION	EMERGENCY DEPARTMENT DISCHARGE	BEHAVIORAL HEALTH ADMISSION	BEHAVIORAL HEALTH DISCHARGE
Jane Doe (Jane.Doe@email.com)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Save Notification Type](#) [Cancel](#)

- After saving the Notification Type, a **Pop-up** displays indicating the record has been successfully updated. Click **OK** to close the pop-up.



The *Selected Patients* displays the list of patients and the event notification types for each patient the user is monitoring. Users can add patients to the patient panel and manage the types of notifications received for each patient.

Selected Patients:

SHOWING 5 ITEMS

PATIENT NAME	USER NAME	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
BILL ASHLAND	User One (Username.One@email.com)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
COUNTRY HOUSE	User One (Username.One@email.com)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
BIG BROWN	User One (Username.One@email.com)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ILHAVE ANOTHER	User One (Username.One@email.com)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
BOBBY BRADY	User One (Username.One@email.com)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

First Back 1 Next Last

Maximum 5 entries per page

Add Patient Edit Notification

- To add patients to the panel, click **Add Patient** to open the *Patient Search*.

Selected User:

USER NAME	HOSPITAL ADMISSION	HOSPITAL DISCHARGE	EMERGENCY DEPARTMENT ADMISSION	EMERGENCY DEPARTMENT DISCHARGE	BEHAVIORAL HEALTH ADMISSION	BEHAVIORAL HEALTH DISCHARGE
Jane Doe (Jane.Doe@email.com)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Edit Notification Type

There is no data to be displayed

Add Patient

**Please Note:** If the User has not yet added any patients to receive event notifications, the *Selected Patients* section will not display. Once the User adds patients, the *Selected Patients* section is enabled and displays data.

10. The *Patient Search* displays. Enter the patient's **First Name** and **Last Name**.
11. Enter the patient's **Date of Birth**.
12. When the Date of Birth is unknown, provide the patient's **Age Range**.
13. Enter the patient's **Sex**.
14. Click **Search**. The Patient Search Results display to the right.

[Select Another User](#)

PATIENT SEARCH

No Searches Completed

First Name

Last Name

Sex

☒ Unspecified
 ☐ Male
 ☐ Female

Date Of Birth  
MM/DD/YYYY

Age Range

0 - 115

SEARCH

Clear All

15. Click the **Checkbox** next to the patient for whom you want to receive event notifications.

PATIENT SEARCH

3

**PATIENT MATCHES FOUND**

First Name

Bobby

Last Name

Brady

Sex

☒ Unspecified
 ☐ Male
 ☐ Female

Date Of Birth  
MM/DD/YYYY

07/12/1970

Age Range

0 - 115

SEARCH

Clear All

SHOWING  
3 ITEMS

	NAME	DATE OF BIRTH	GENDER	ADDRESS
<input checked="" type="checkbox"/>	BOBBY BRADY	07/12/1970	M	1234 TEST ST LEXINGTON KY 40137
<input type="checkbox"/>	BOBBY BRADY	06/12/1970	F	29221 BELLAVUE DR UNIT 33 LEXINGTON KY 41010
<input type="checkbox"/>	ROBERT BRADY	06/12/1970	M	154 BARBERRY LN BARDSTOWN KY 40004

[First](#)
[Back](#)

1

[Next](#)
[Last](#)

Maximum 

5

 entries per page

16. Click **Show Selected Patient** to display the patient's name.

### PATIENT SEARCH

First Name

Last Name

Sex

☒ Unspecified  
☐ Male  
☐ Female

Date Of Birth

MM/DD/YYYY

Age Range

0 - 115

SEARCH

Clear All

### 3 PATIENT MATCHES FOUND

SHOWING 3 ITEMS

	NAME	DATE OF BIRTH	GENDER	ADDRESS
<input checked="" type="checkbox"/>	BOBBY BRADY	07/12/1970	M	1234 TEST ST LEXINGTON KY 40137
<input type="checkbox"/>	BOBBY BRADY	06/12/1970	F	29221 BELLAVUE DR UNIT 33 LEXINGTON KY 41010
<input type="checkbox"/>	ROBERT BRADY	06/12/1970	M	154 BARBERRY LN BARDSTOWN KY 40004

First Back 1 Next Last

Maximum 5 entries per page

Show Selected Patient

**Please Note:** To add multiple patients at the same time, do not click on **Add Notifications** until the final patient has been selected.

Users should continue using the search functionality to search for and add patients to the list. Click **Add Notifications** once the last patient has been added.

17. Click **Add Notifications** to select the notifications.

### PATIENT SEARCH

First Name

Last Name

Sex

☒ Unspecified  
☐ Male  
☐ Female

Date Of Birth

MM/DD/YYYY

Age Range

0 - 115

SEARCH

Clear All

### 3 PATIENT MATCHES FOUND

SHOWING 3 ITEMS

	NAME	DATE OF BIRTH	GENDER	ADDRESS
<input checked="" type="checkbox"/>	BOBBY BRADY	07/12/1970	M	1234 TEST ST LEXINGTON KY 40137
<input type="checkbox"/>	BOBBY BRADY	06/12/1970	F	29221 BELLAVUE DR UNIT 33 LEXINGTON KY 41010
<input type="checkbox"/>	ROBERT BRADY	06/12/1970	M	154 BARBERRY LN BARDSTOWN KY 40004

First Back 1 Next Last

Maximum 5 entries per page

Selected Patients:

NAME	DATE OF BIRTH	GENDER	ADDRESS
BOBBY BRADY	07/12/1970	M	1234 TEST ST LEXINGTON KY 40137

First Back 1 Next Last

Maximum 5 entries per page

Add Notification

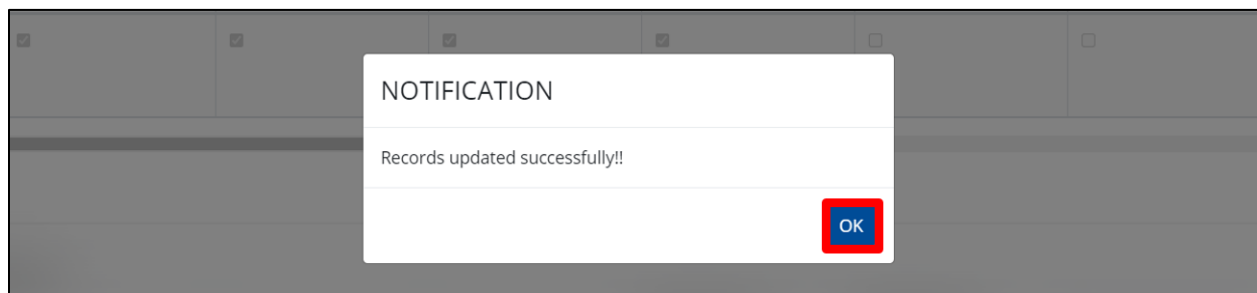
18. Click the appropriate **Checkboxes** to select the notifications you would like to receive on the selected patient(s).
19. Click **Save Notifications** to save the changes.

Select Notifications:

PATIENT NAME	USER NAME	HOSPITAL ADMISSION	HOSPITAL DISCHARGE	EMERGENCY DEPARTMENT ADMISSION	EMERGENCY DEPARTMENT DISCHARGE	BEHAVIORAL HEALTH ADMISSION	BEHAVIORAL HEALTH DISCHARGE
BOBBY BRADY	Jane Doe (Jane.Doe@email.com)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Save Notifications**

20. The **Notification Pop-up** displays. Click **OK** to close the pop-up.



**Please Note:** For additional information on Setting up and Managing Event Notifications in the ePartnerViewer, refer to the *Resources* section in the ePartnerViewer.

## 12 Managing User Preferences

Users can customize their view of patient data in a format that is functional for them. Customization includes setting a preference for the number and arrangement of Portlets displayed; setting a preference for date, time, and number format; and setting the default preference for how much data is retrieved upon initial patient search. Once set, these preferences will remain in effect for every patient chart viewed until the user changes them again.

### Apply Customized Preferences

1. To navigate to the **Preferences** page, click your **username** displayed in the top right corner.
2. Select **Preferences** from the drop-down menu.



## Patient Dashboard Display

Enables you to customize the appearance of the *Patient Summary* dashboard by selecting the Portlets you want to see and arranging them in an order that is functional for you.

3. On the **Preferences** page, click **Patient Dashboard Display**.

MY PREFERENCES

Patient Dashboard Display

Don't need access to all the portlets available in ePartnerViewer? Drag and re-arrange the portlets you would like to display on the Patient Summary dashboard.

Show	Hide
Clinical Documents	
Encounters	
Laboratory	
Radiology	
Pathology	
Transcribed Reports	
Uncategorized	
Immunizations	
Procedures	
Problems	

4. To customize the order in which the Portlets appear, drag the Portlets up and down to arrange them in the desired order.

Patient Dashboard Display

Don't need access to all the portlets available in ePartnerViewer? Drag and re-arrange the portlets you would like to display on the Patient Summary dashboard.

Show	Hide
Clinical Documents	Uncategorized
Encounters	
Laboratory	
Radiology	
Pathology	
PDMP Program	
Transcribed Reports	
Immunizations	
Procedures	
Problems	
Medications	
Allergies	
Electronic Case Reports	

Save Reset

5. To hide Portlets so that they are not visible on the Patient Summary, drag the Portlets across to the *Hide* column.

The screenshot shows the 'Patient Dashboard Display' preferences window. On the left is a sidebar with 'Patient Dashboard Display' selected. The main area has a title 'Patient Dashboard Display' and a subtitle 'Don't need access to all the portlets available in ePartnerViewer? Drag and re-arrange the portlets you would like to display on the Patient Summary dashboard.' Below this are two columns: 'Show' and 'Hide'. The 'Show' column contains 'Clinical Documents', 'Encounters', 'Procedures' (highlighted with a red box), and 'Laboratory'. The 'Hide' column contains 'Uncategorized' (highlighted with a red box).

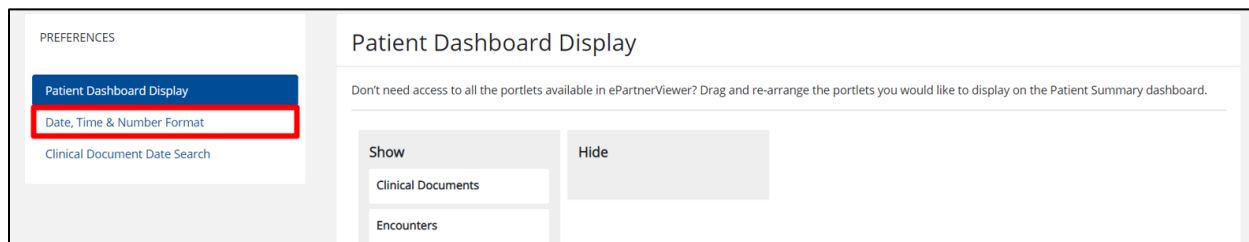
6. Click **Save** to apply changes.

This screenshot shows the same 'Patient Dashboard Display' preferences window. The 'Show' column now lists 'Clinical Documents', 'Encounters', 'Laboratory', 'Radiology', 'Pathology', 'Transcribed Reports', 'Uncategorized', 'Immunizations', 'Procedures', 'Problems', 'Medications', 'Allergies', 'PDMP Program', and 'Electronic Case Reports'. The 'Hide' column still contains 'Uncategorized'. At the bottom of the main area, the 'Save' button is highlighted with a red box, next to a 'Reset' button.

## Date, Time, and Number Format

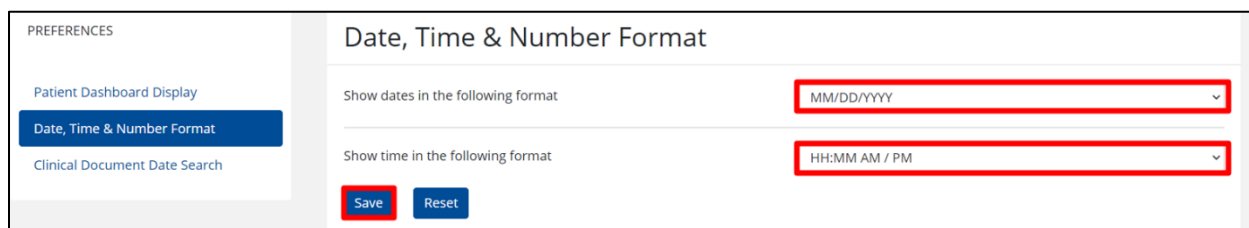
Enables users to choose a preferred date, time, and number format displayed throughout the ePartnerViewer. Note that changes are not applied to information contained *within* clinical reports (e.g., radiology report date listed in text will **not** be altered).

1. On the **Preferences** page, click **Date, Time, & Number Format**.



The screenshot shows the 'PREFERENCES' page. In the left sidebar, under the 'PREFERENCES' header, the 'Date, Time & Number Format' option is highlighted with a red box. Other options visible are 'Patient Dashboard Display' and 'Clinical Document Date Search'. The main content area is titled 'Patient Dashboard Display' and contains a section for portlets with 'Show' and 'Hide' buttons.

2. Select the **preferred date format** and the **preferred time format** from the drop-downs.
3. Click **Save** to apply changes.



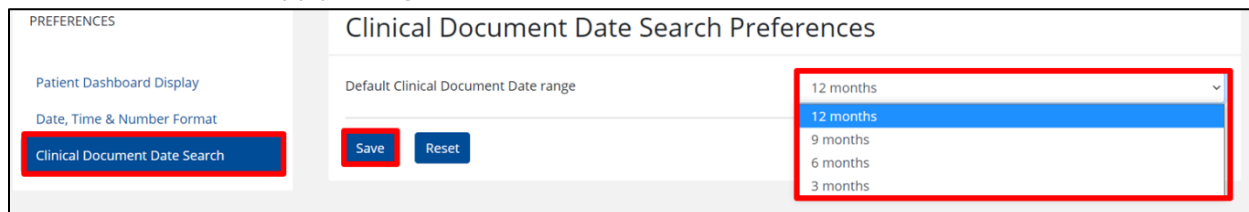
The screenshot shows the 'Date, Time & Number Format' preferences page. The left sidebar has 'Date, Time & Number Format' selected. The main content area has two drop-down menus: 'Show dates in the following format' set to 'MM/DD/YYYY' and 'Show time in the following format' set to 'HH:MM AM / PM'. Both drop-downs are highlighted with red boxes. At the bottom, the 'Save' button is highlighted with a red box, and the 'Reset' button is visible next to it.

## Clinical Document Date Search

Enables users to choose a default setting for how much patient data is retrieved upon the initial patient search. The standard default is to retrieve the last twelve (12) months of data.

The Date Selection feature allows you to control how much data you retrieve for a patient.

1. On the **Preferences** page, click **Clinical Document Date Search**.
2. You can select either of the following settings as your default:
  - Select **3 months** to see the latest 3 months of patient data.
  - Select **6 months** to see the latest 6 months of patient data.
  - Select **9 months** to see the latest 9 months of patient data.
  - Select **12 months** to see the latest 12 months of patient data.
3. Click **Save** to apply changes.



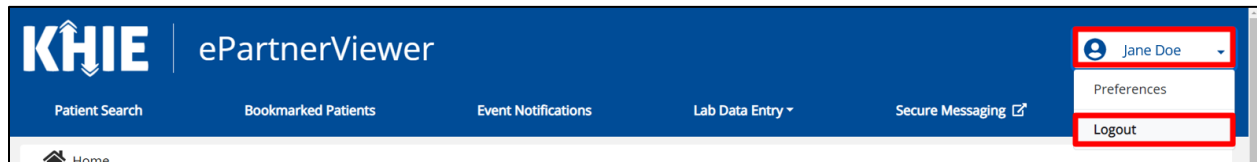
The screenshot shows the 'Clinical Document Date Search Preferences' page. The left sidebar has 'Clinical Document Date Search' selected. The main content area has a section titled 'Default Clinical Document Date range' with a drop-down menu. The '12 months' option is selected and highlighted with a blue bar. The entire drop-down menu area is highlighted with a red box. At the bottom, the 'Save' button is highlighted with a red box, and the 'Reset' button is visible next to it.



## 13 Logging Out of the ePartnerViewer

Users must log out to maintain security and minimize the risk of a potential HIPAA violation.

1. To exit the ePartnerViewer, click your **username** displayed in the top right corner.
2. Select **Logout** from the drop-down menu.



## 14 Technical Support

### Support Tab in the Navigation Bar

To contact us for support with the ePartnerViewer, click the Support Tab located in the *Navigation Bar* 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 electronically or request support regarding the ePartnerViewer, please email [KHIESupport@ky.gov](mailto:KHIESupport@ky.gov).