KHIE
KENTUCKY
HEALTH INFORMATION EXCHANGE
Connecting Kentucky. Improving Healthcare.

Kentucky Health Information Exchange (KHIE)

ePartnerViewer

User Guide

July 2021

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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	• Patient **at-a-glance** view of the most recent clinical information
Medications & Allergies	• Medications • Medication & Non-Medication Allergies
Clinical Documents	• Continuity of Care Documents (CCDs) • KHIE Summary CCD • Medicaid CCD • Prescription Drug Monitoring Program (PDMP) • Other Documents
Laboratory & Pathology	• Laboratory Results • Pathology Results
Reports	• Radiology Reports • Other Transcribed Reports • Images
Encounters	• Clinical Encounters • Problems • Procedure History
Immunizations	• Immunization History
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
Microsoft Edge	
Version 44+	Version 40+
Google Chrome	
Version 70+	Version 70+
Mozilla Firefox	
Version 48+	Version 48+
Apple Safari	
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:

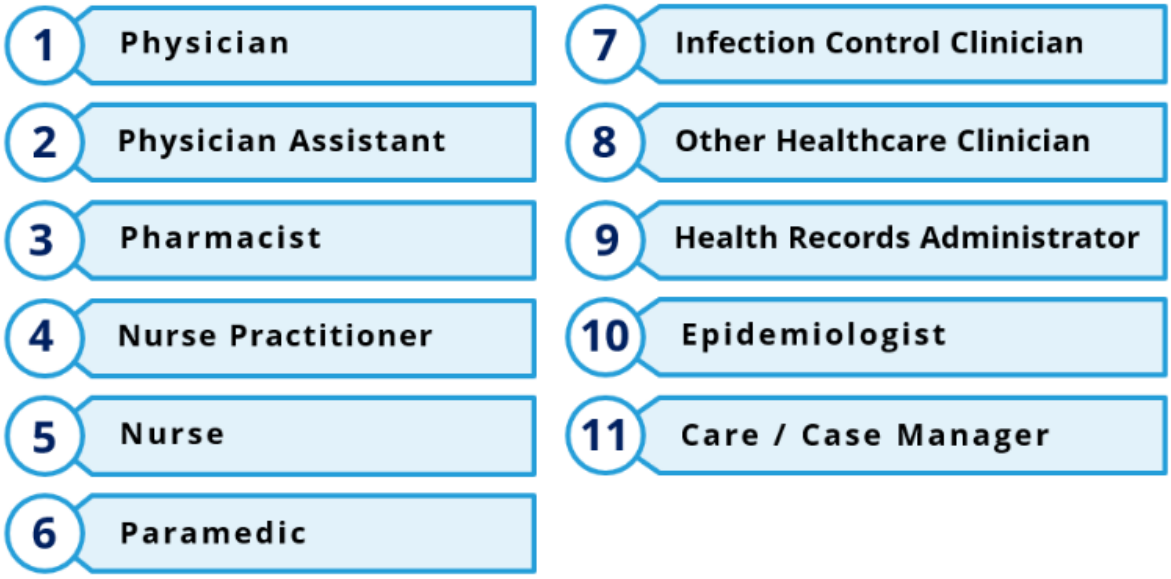
1. Users must be part of an organization with a signed Participation Agreement with KHIE.
2. Users are required to have a Kentucky Online Gateway (KOG) account.
    a. Details on creating a KOG account are in *Section 2 KOG Registration and Login* of this guide.
3. Users are required to complete Multi-Factor 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:



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:

Event Notification Administrator	User who has been authorized by an Organization to manage their event notifications within the ePartnerViewer.
KHIE Organization Administrator	User who has been authorized by an Organization to manage their authorized users.
Manual Data Submission	User who has been authorized by an Organization to manually enter certain reportable laboratory results in the ePartnerViewer.
Access Administrator	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.
PACS Administrator	User who has been authorized by an Organization to export radiology images to a local Picture Archiving and Communications System (PACS).
Manual Case Reporter	User who has been authorized by an Organization to manually enter case reports for communicable disease reporting.

3 KOG Registration and Login

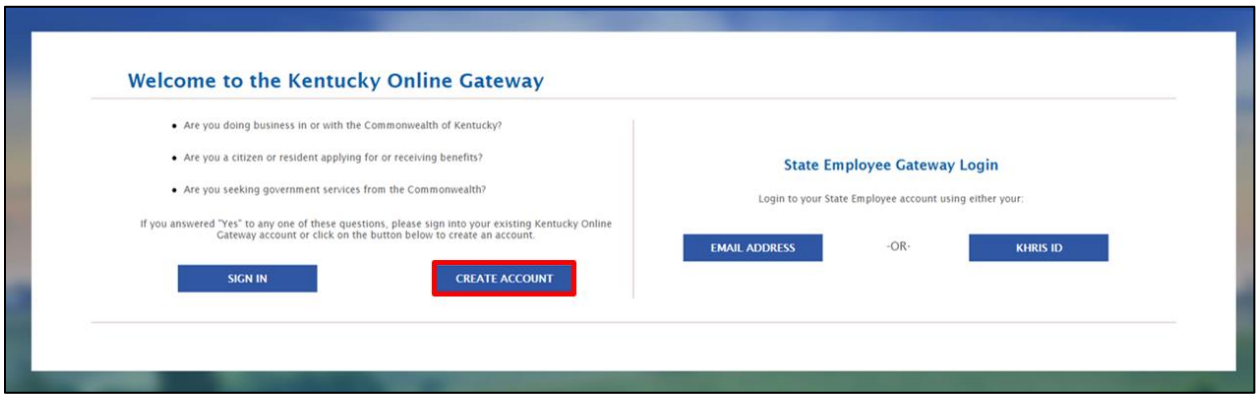
Create a KOG Account

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**.

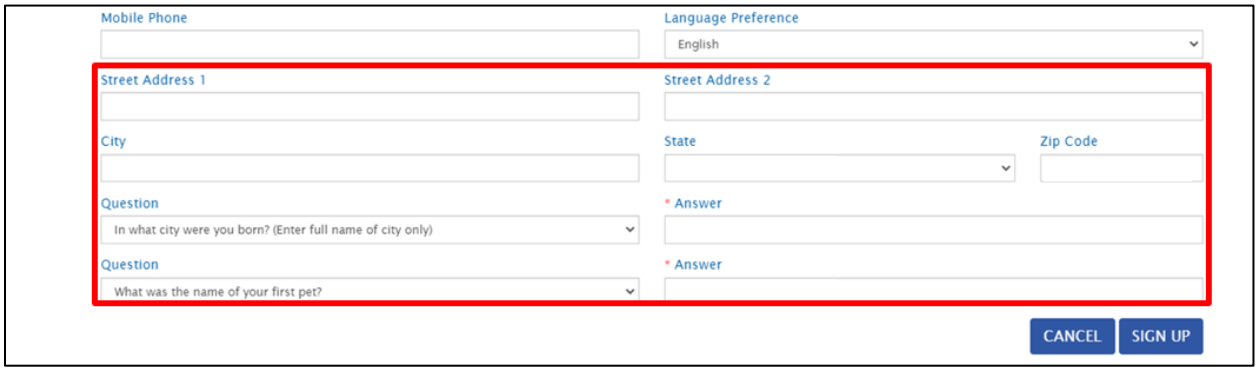


Please Note: If you already have an existing KOG account with the same email address from which you received the invitation to enroll, do not create a new account. Log into KOG using your existing credentials.

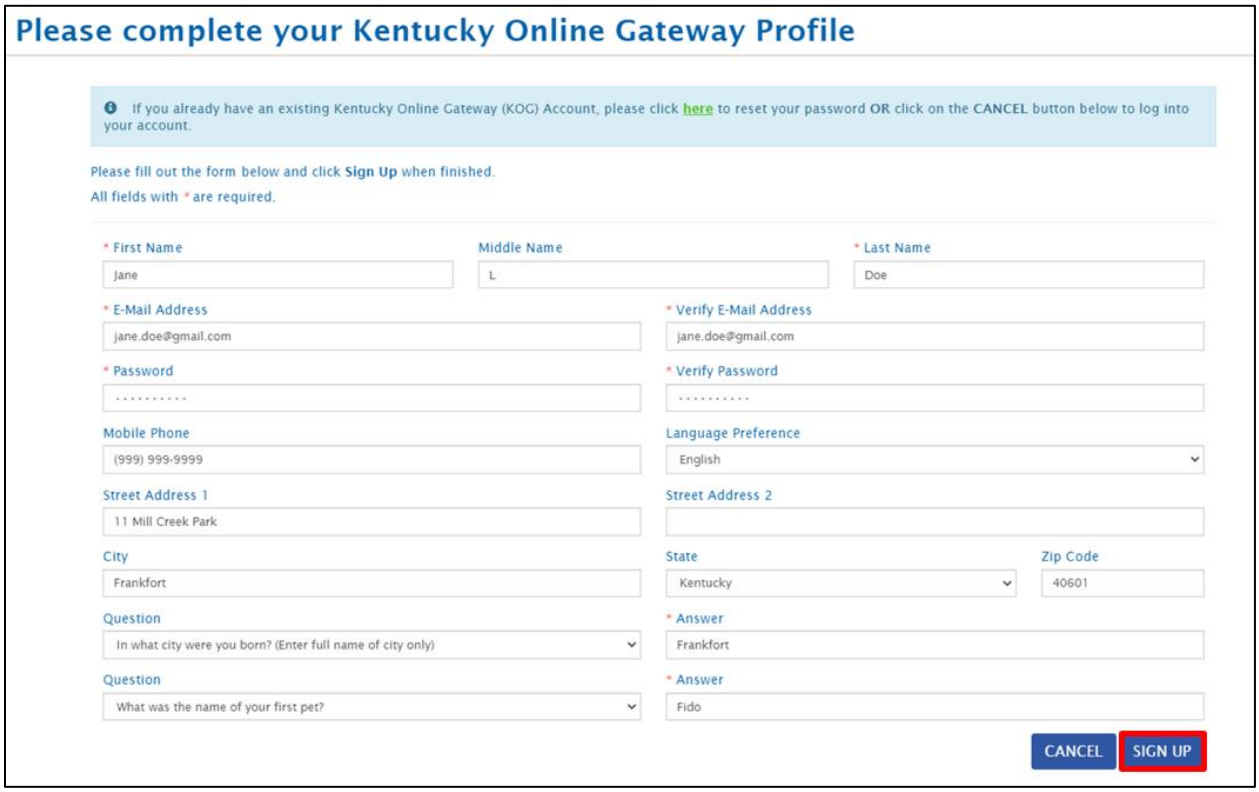
4. Enter Registration Information. Mandatory fields are marked with asterisks (*).
5. Enter **First Name**.
6. Enter **Last Name**.
7. Enter **Email Address**.

Please 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.

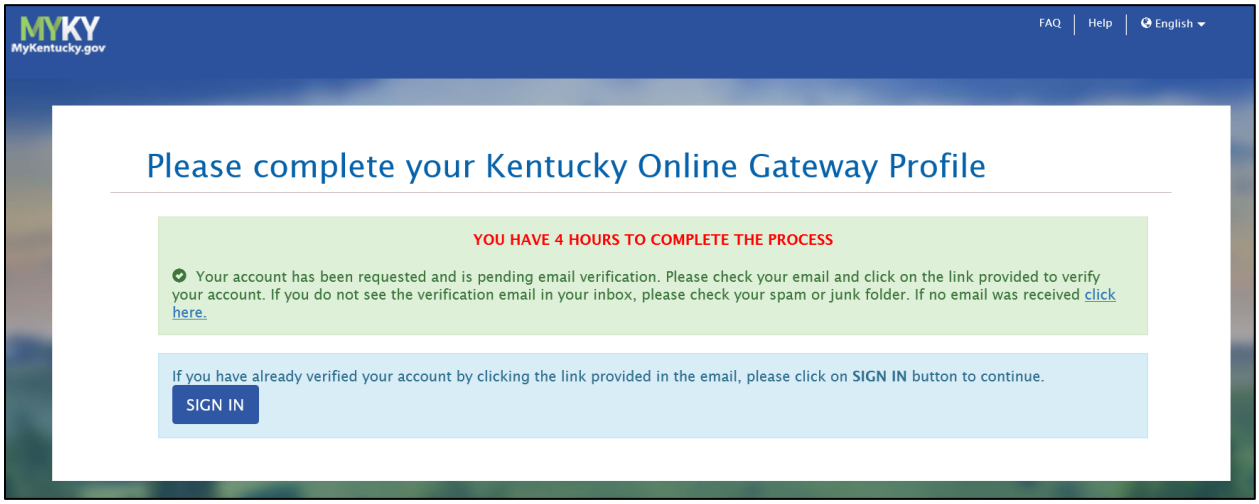


14. After completing the mandatory fields, click **Sign Up**.



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.*

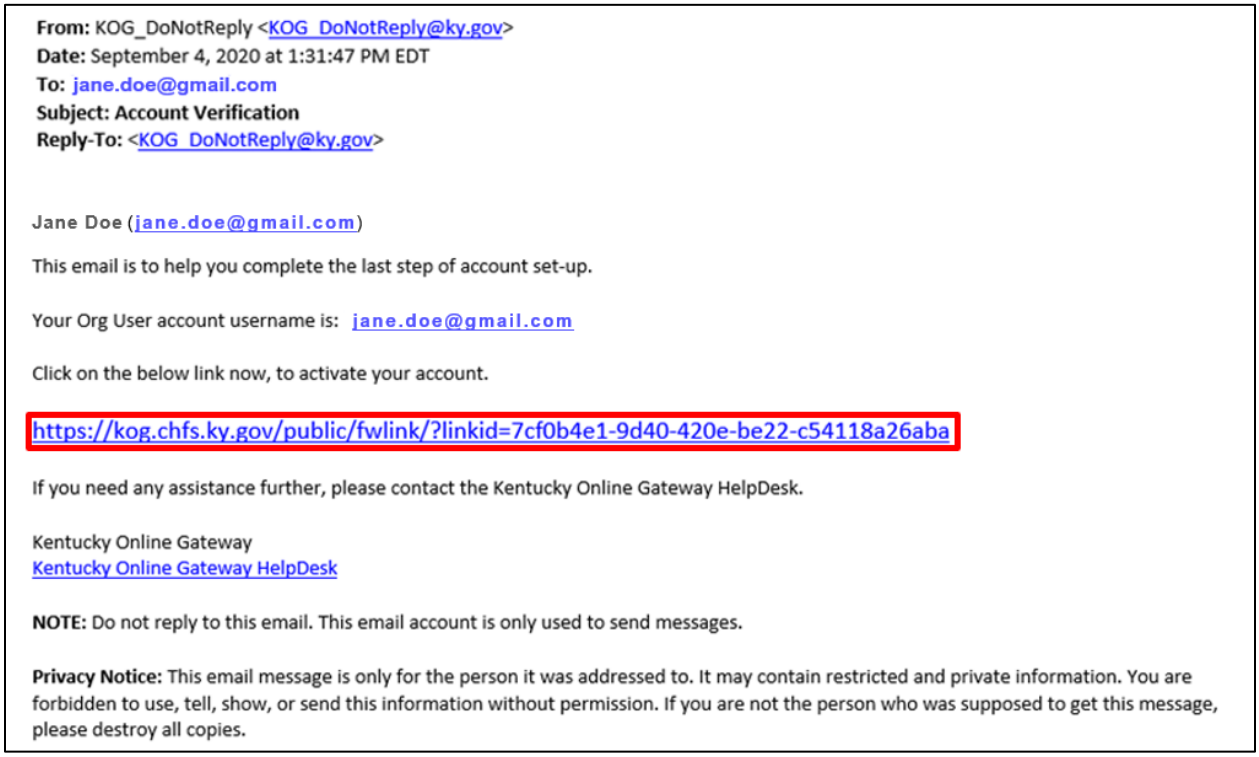
16. You must check your email to complete the KOG Account Validation process.



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.



From: KOG_DoNotReply <KOG_DoNotReply@ky.gov>
Date: September 4, 2020 at 1:31:47 PM EDT
To: jane.doe@gmail.com
Subject: Account Verification
Reply-To: <KOG_DoNotReply@ky.gov>

Jane Doe (jane.doe@gmail.com)

This email is to help you complete the last step of account set-up.

Your Org User account username is: jane.doe@gmail.com

Click on the below link now, to activate your account.

https://kog.chfs.ky.gov/public/fwlink/?linkid=7cf0b4e1-9d40-420e-be22-c54118a26aba

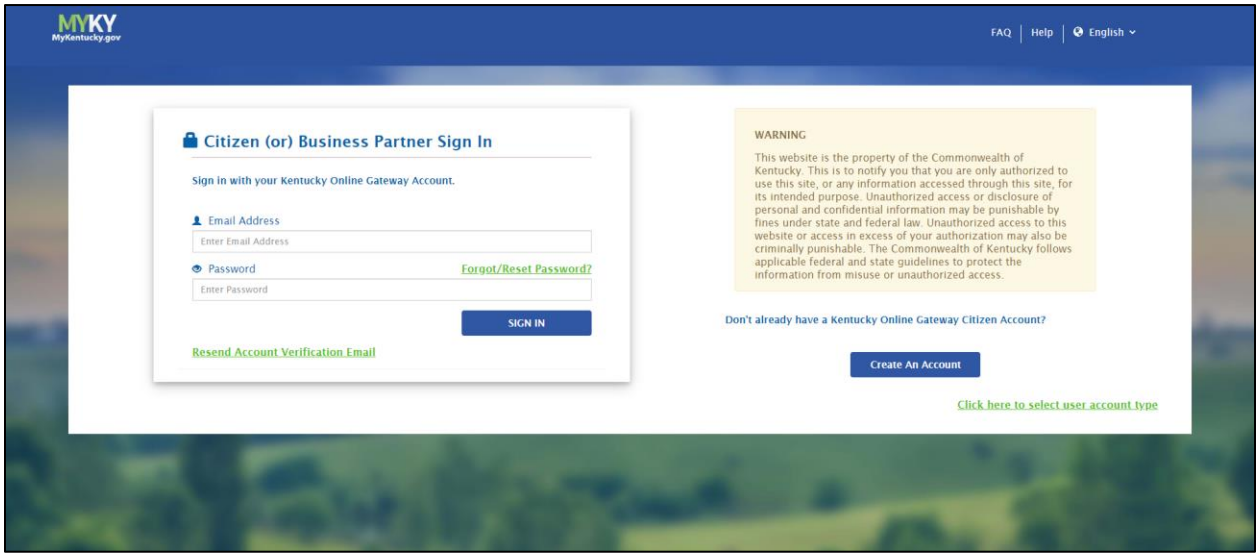
If you need any assistance further, please contact the Kentucky Online Gateway HelpDesk.

Kentucky Online Gateway
Kentucky Online Gateway HelpDesk

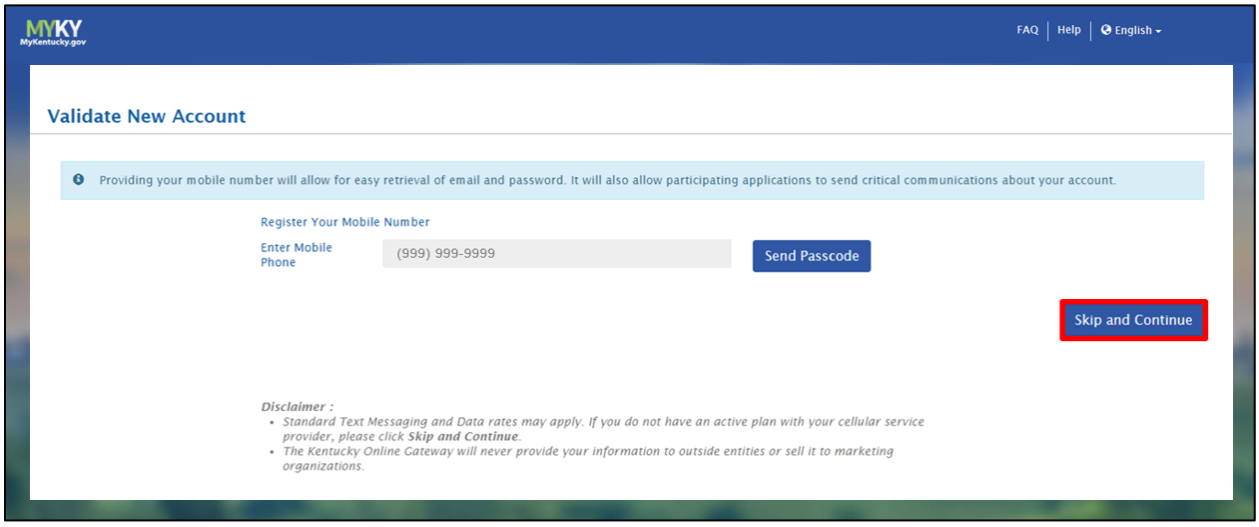
NOTE: Do not reply to this email. This email account is only used to send messages.

Privacy Notice: This email message is only for the person it was addressed to. It may contain restricted and private information. You are forbidden to use, tell, show, or send this information without permission. If you are not the person who was supposed to get this message, please destroy all copies.

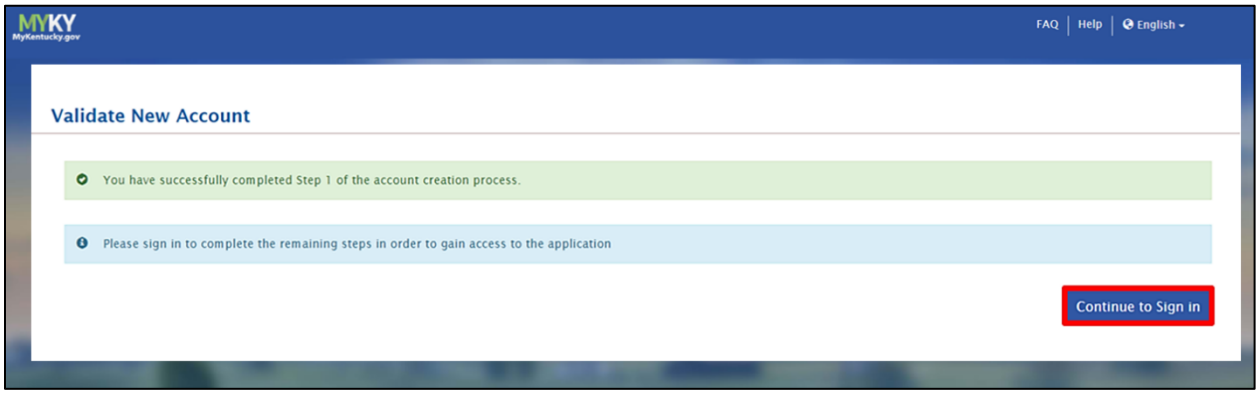
18. Click the **link** in the email to be directed to the **KOG Login Page**.



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.



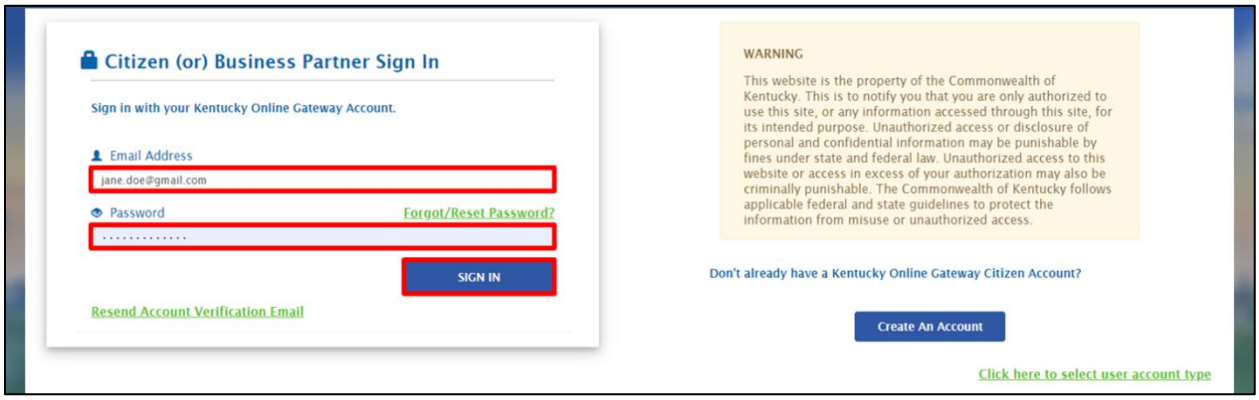
21. On the **KOG Login Page**, enter your **Email Address**.

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

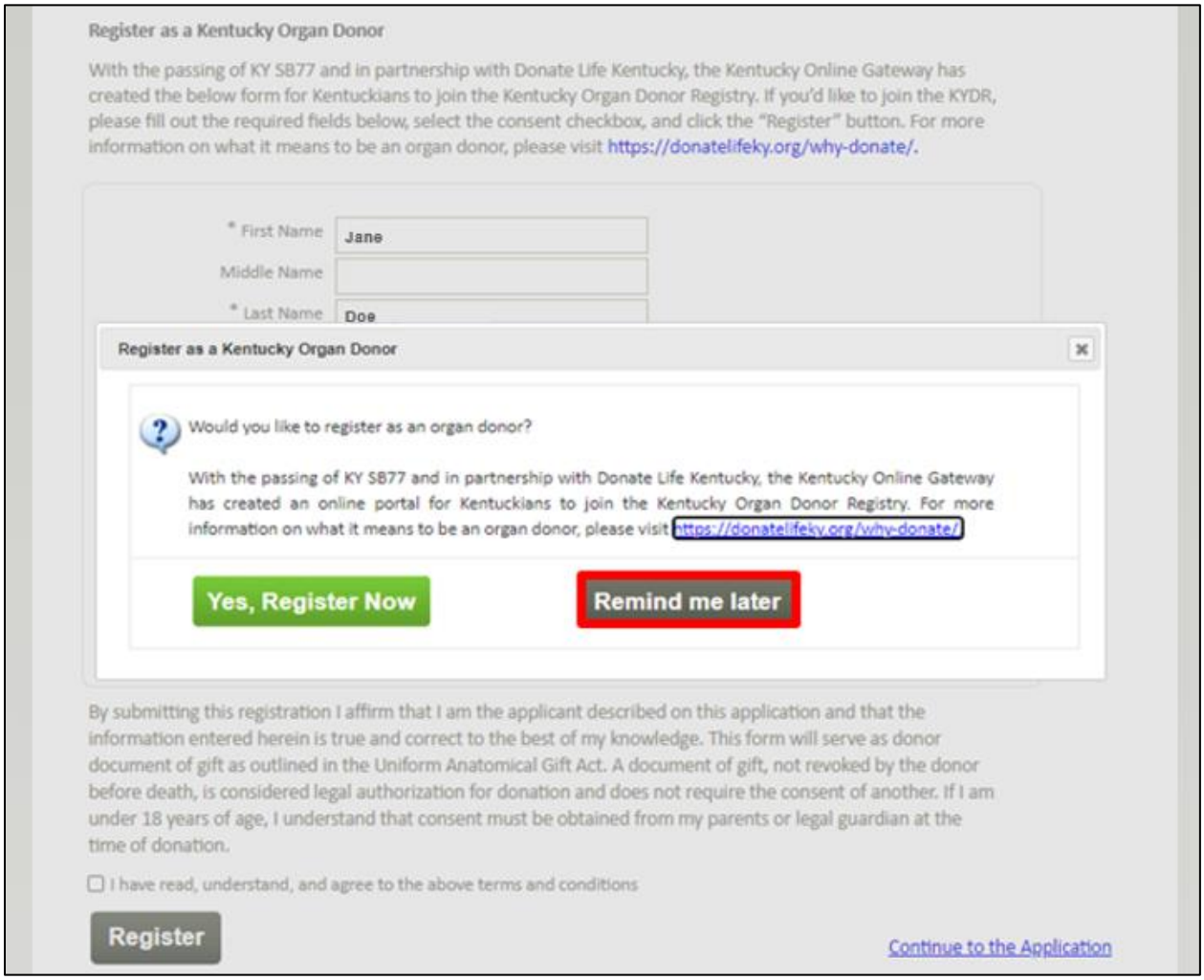
22. Enter your **Password**.

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

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



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.

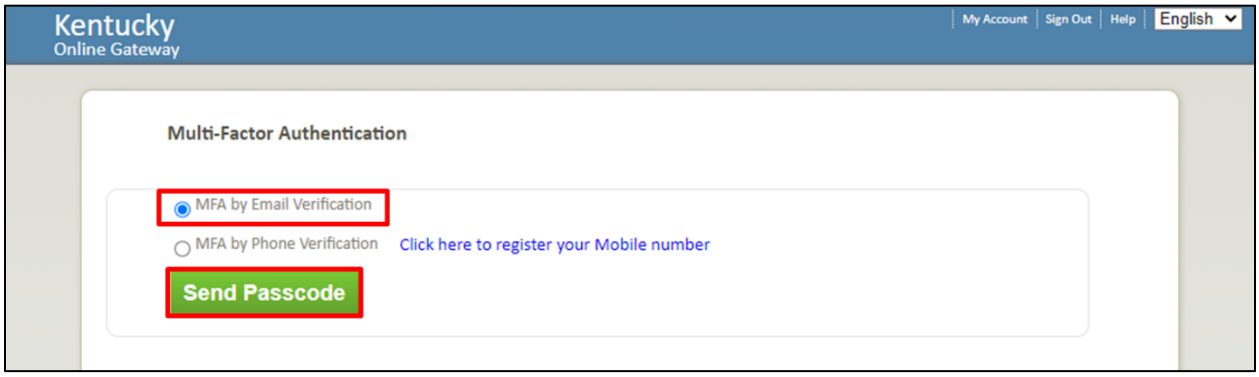


Multi-Factor Authentication

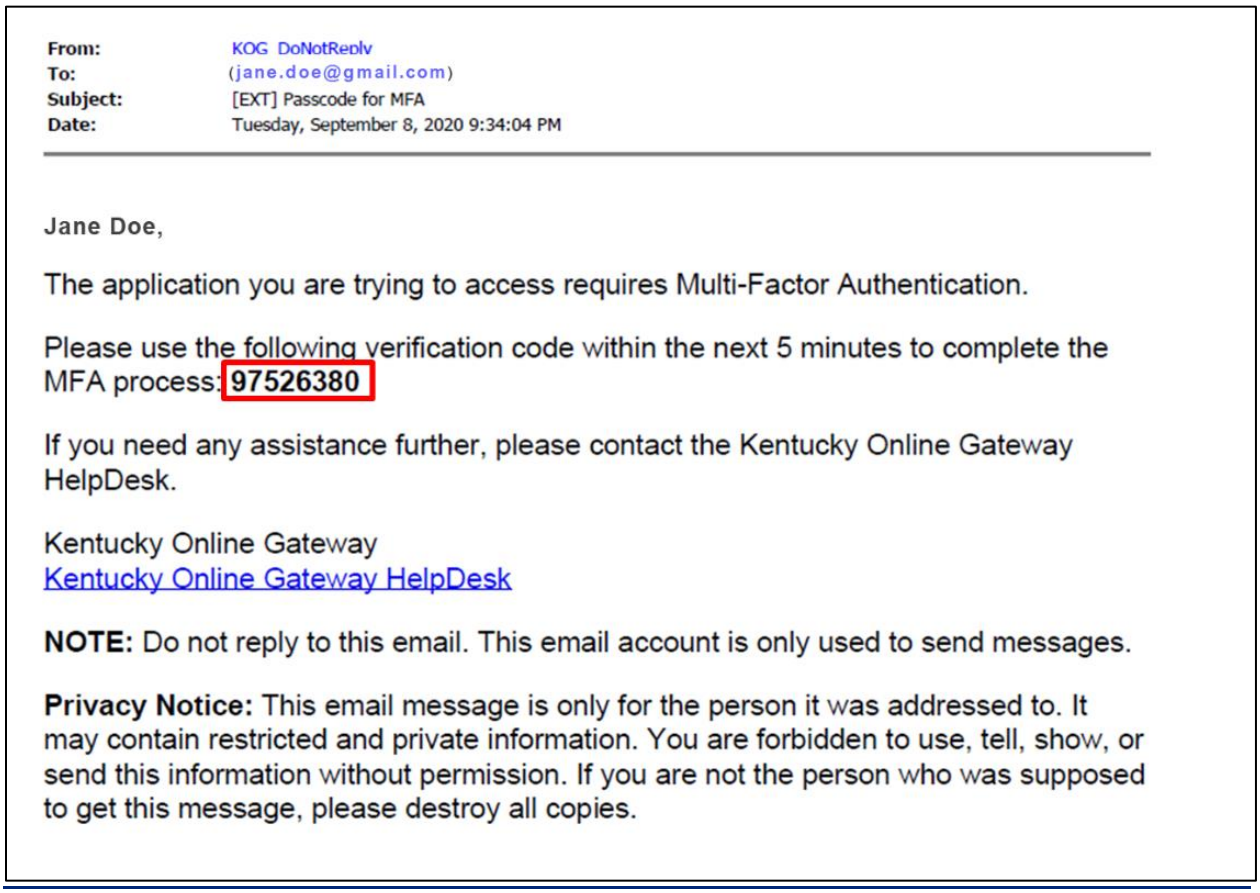
After login, complete Multi-Factor Authentication or MFA. You have the option to receive an MFA passcode by Email or Text.

MFA by Email Verification

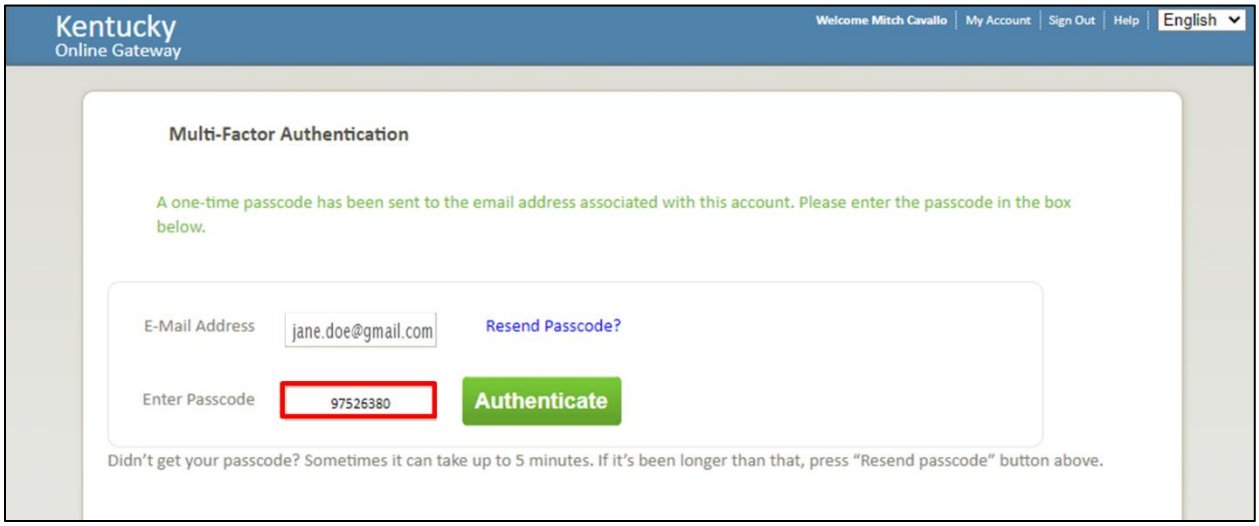
25. To receive the MFA passcode by email, select the **MFA by Email Verification** button and click **Send Passcode**.



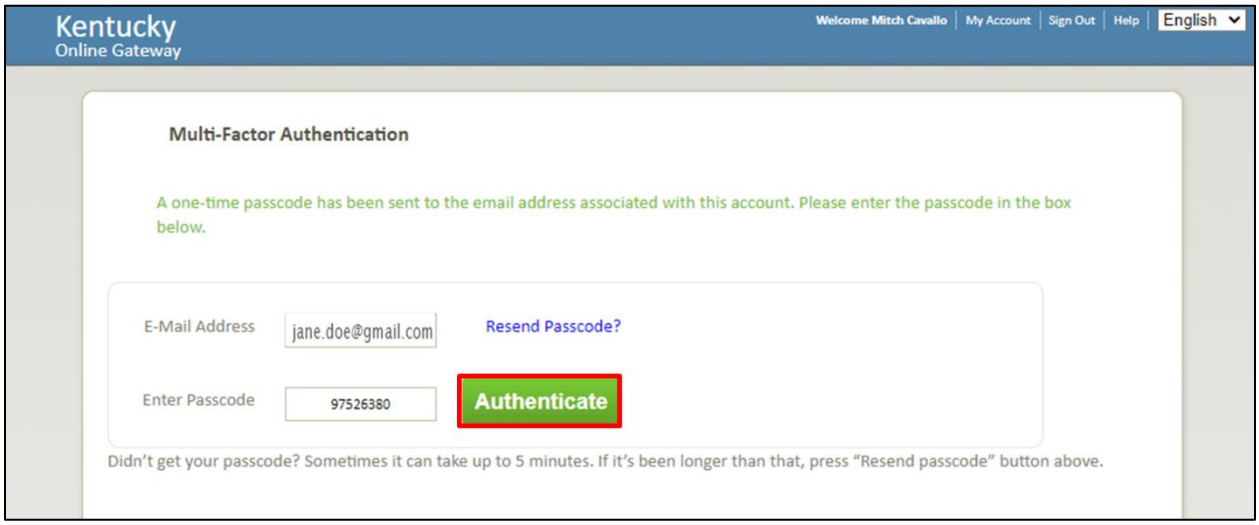
26. You will receive an email titled *Passcode for MFA* from KOG_DoNotReplay@ky.gov. You must open that email in a separate tab.



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.

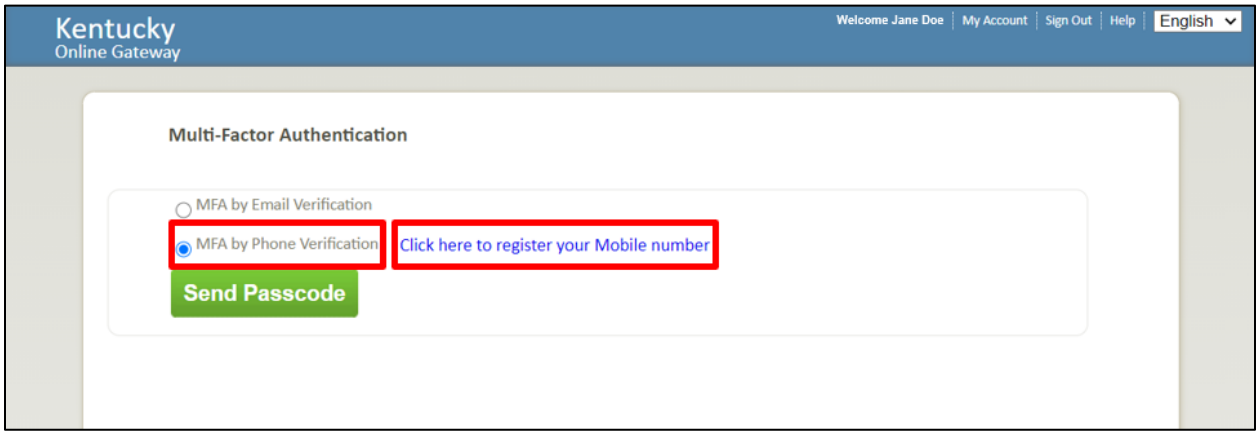


28. Click **Authenticate** to be directed to the **Terms and Conditions** page in the ePartnerViewer.

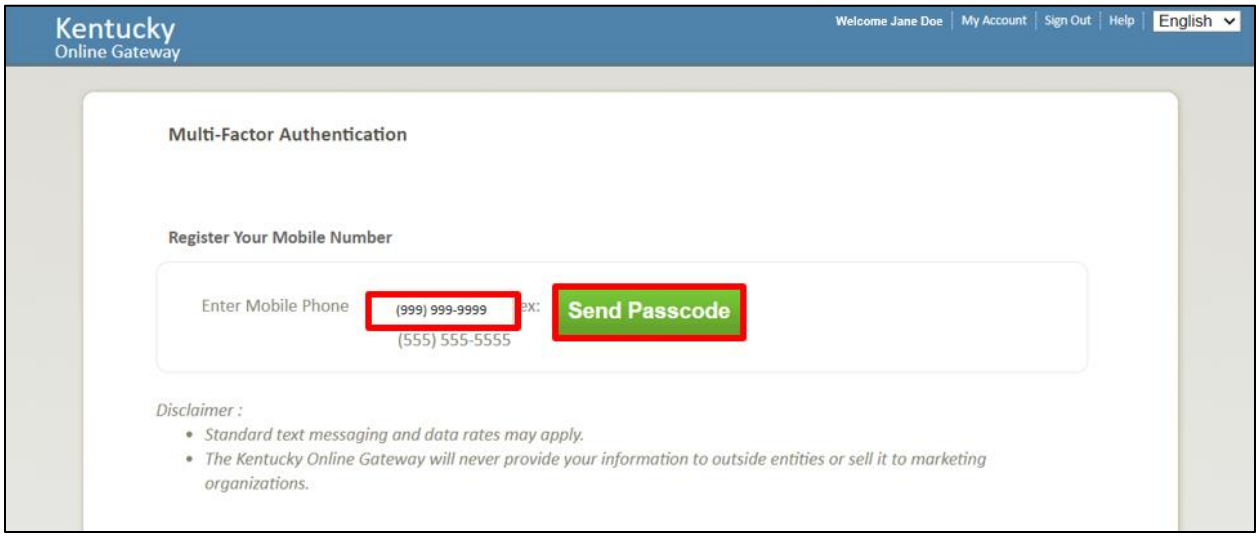


MFA by Phone Verification

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**.

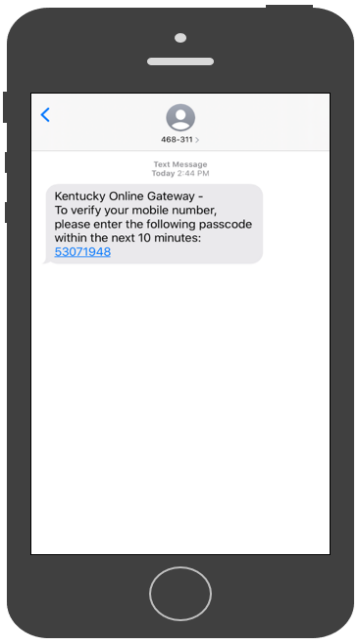


31. The **Register Your Mobile Number** screen displays for Users who have not registered their phone number. You must enter your **mobile phone number** and click **Send Passcode**.



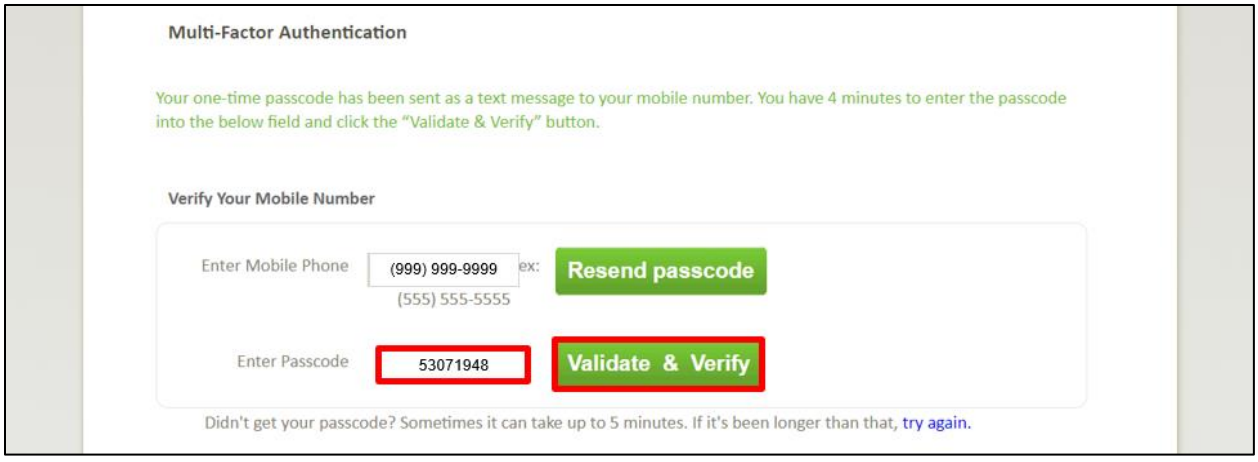
Please Note: The **Register Your Mobile Number** screen does not display for Users who have already registered their phone number. Instead, these Users will be prompted to enter the passcode to validate and verify identify on the **Multi-Factor Authentication** screen.

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.

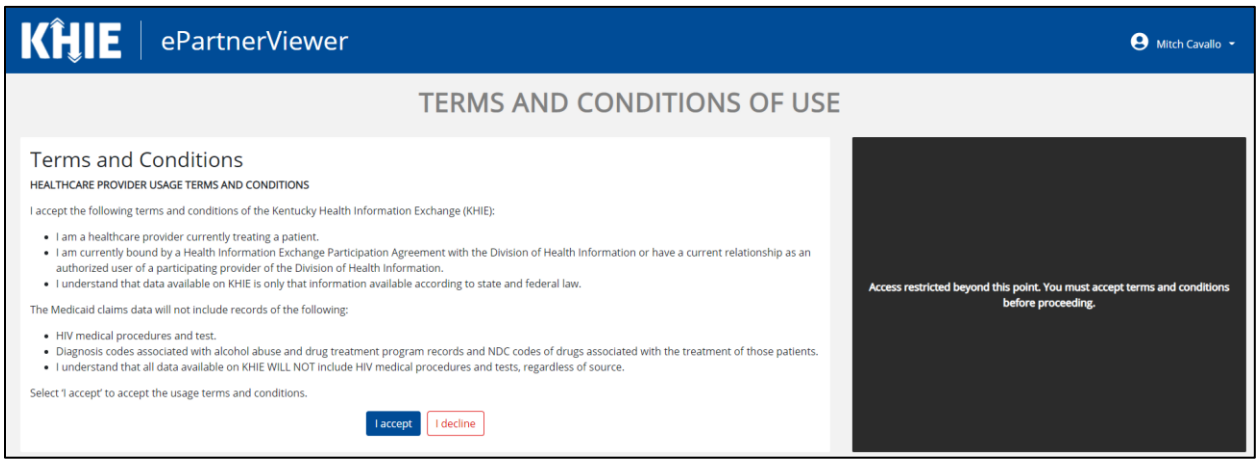
33. To verify the mobile number, enter the **8-digit code** from the text message into the *Enter Passcode* field on the **Multi-Factor Authentication** screen.
34. Click **Validate & Verify** to be directed to the **Terms and Conditions of Use** page in the ePartnerViewer.



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

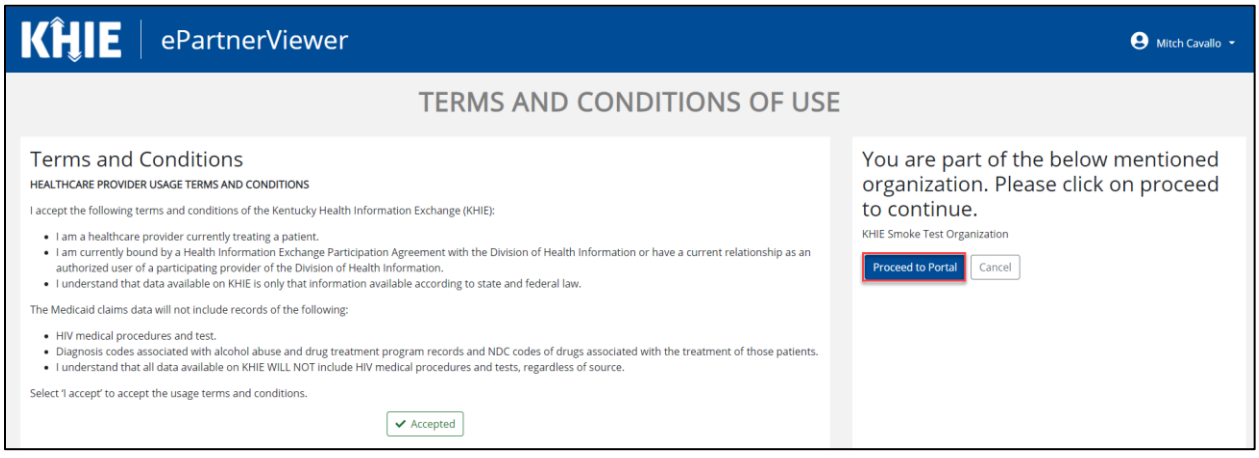
4 Terms of Use and Logging In

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.



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.



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.

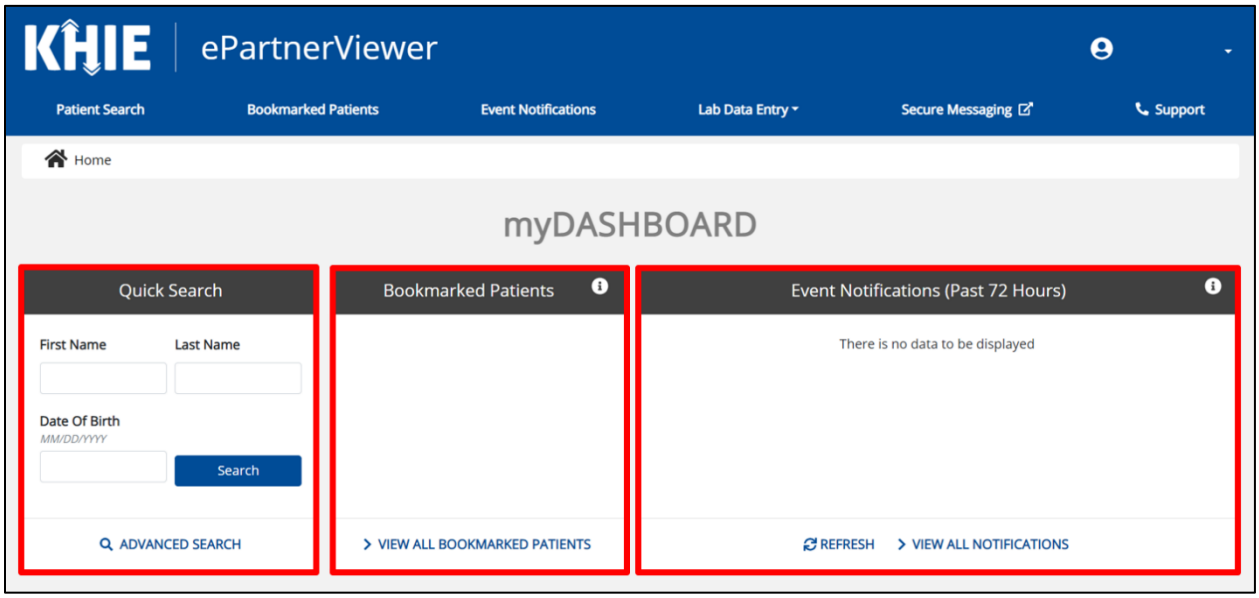
5 myDASHBOARD Overview

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.

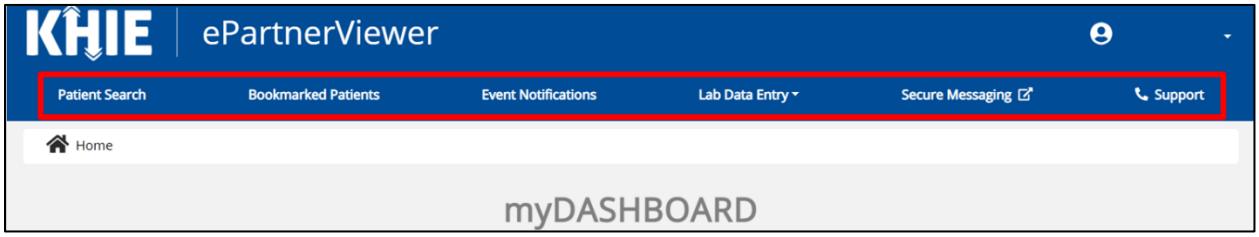


Navigation Bar

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:

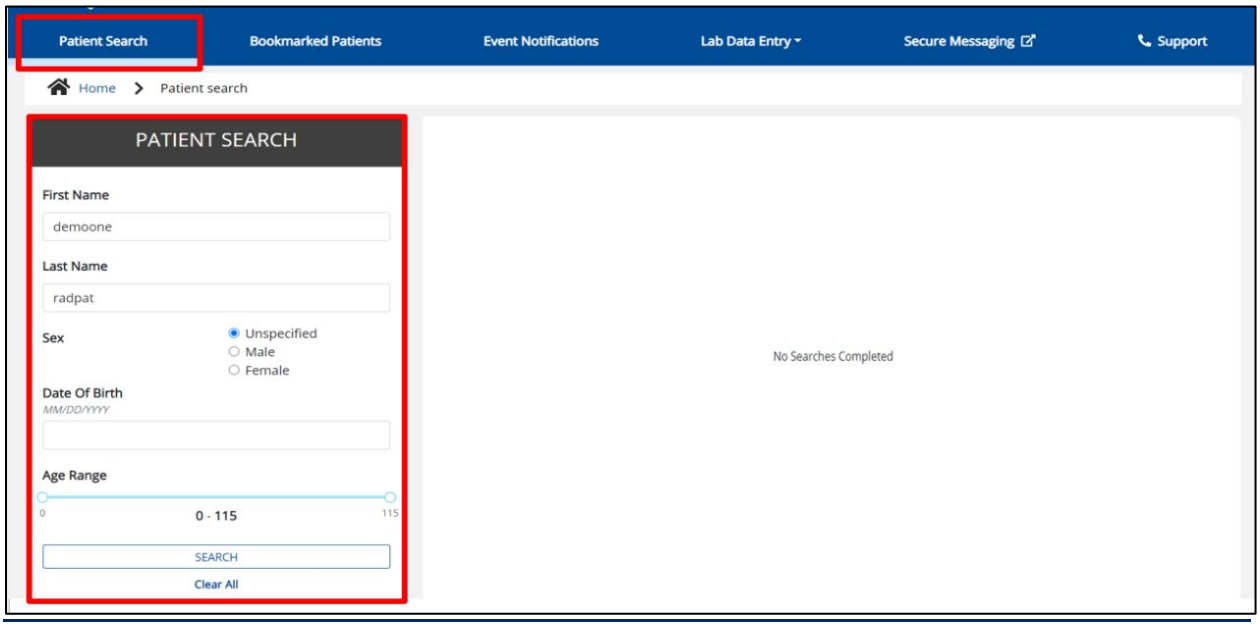
- Patient Search
- Bookmarked Patients
- Event Notifications
- Lab Data Entry
- Case Report Entry
- Secure Messaging
- Support



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

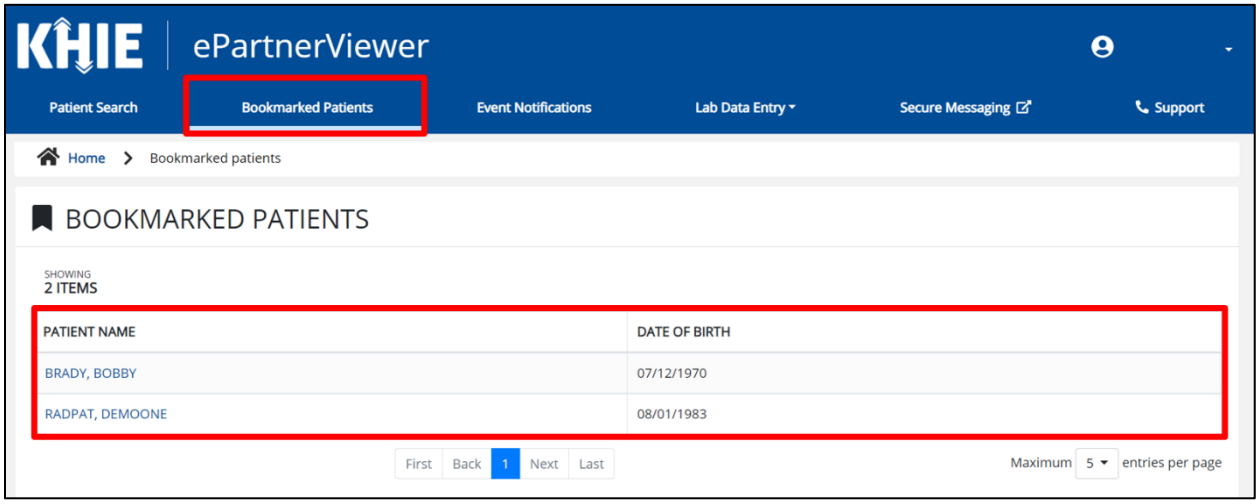
Patient Search Tab

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.*



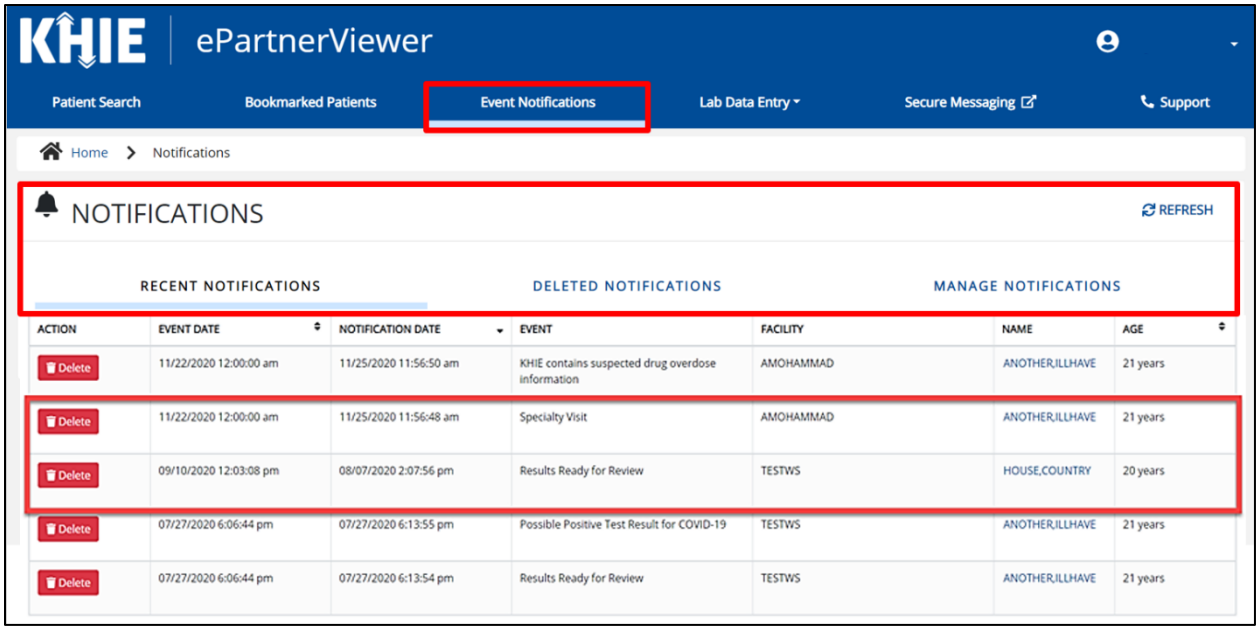
Bookmarked Patients Tab

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*.



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*.



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.

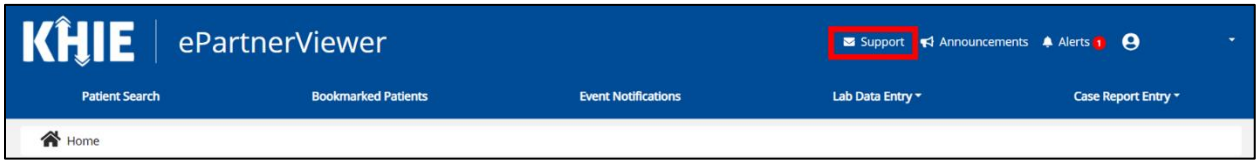
When you click **Secure Messaging**, you will be taken to the **CareAlign login page**. With a CareAlign account, you can send and receive direct secure messages. You can return to the ePartnerViewer by using the browser tab at the top of the screen.

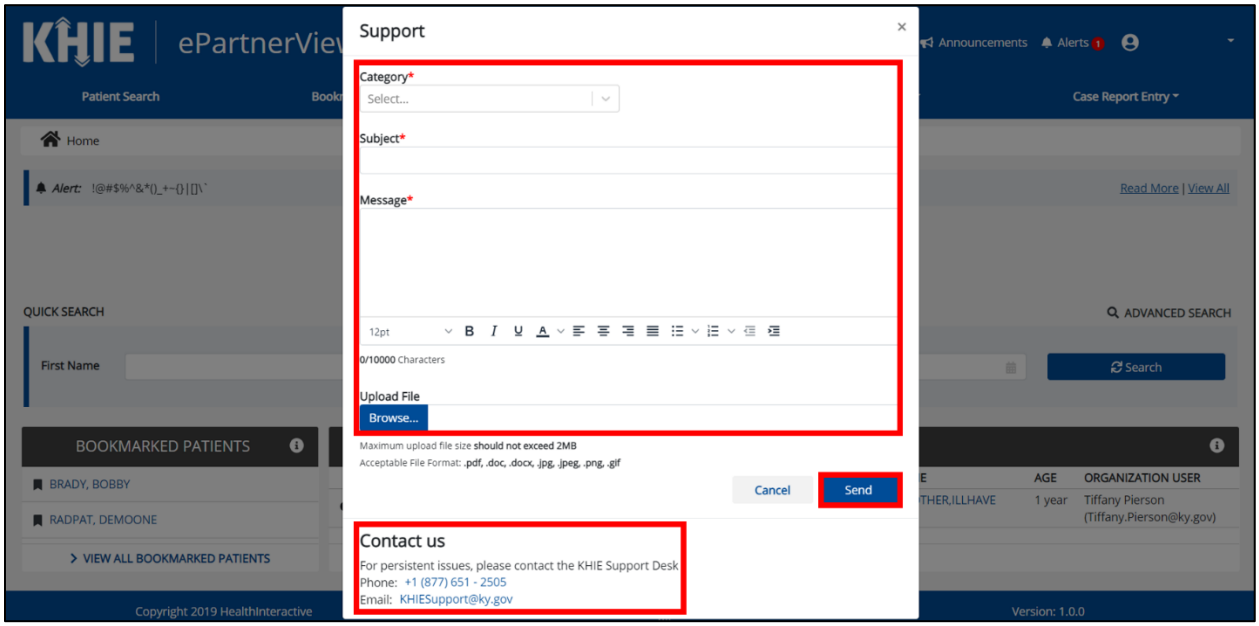
Please Note: You must have a CareAlign account. You can find information about Direct Secure Messaging and CareAlign in Resources.

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.





User Profile

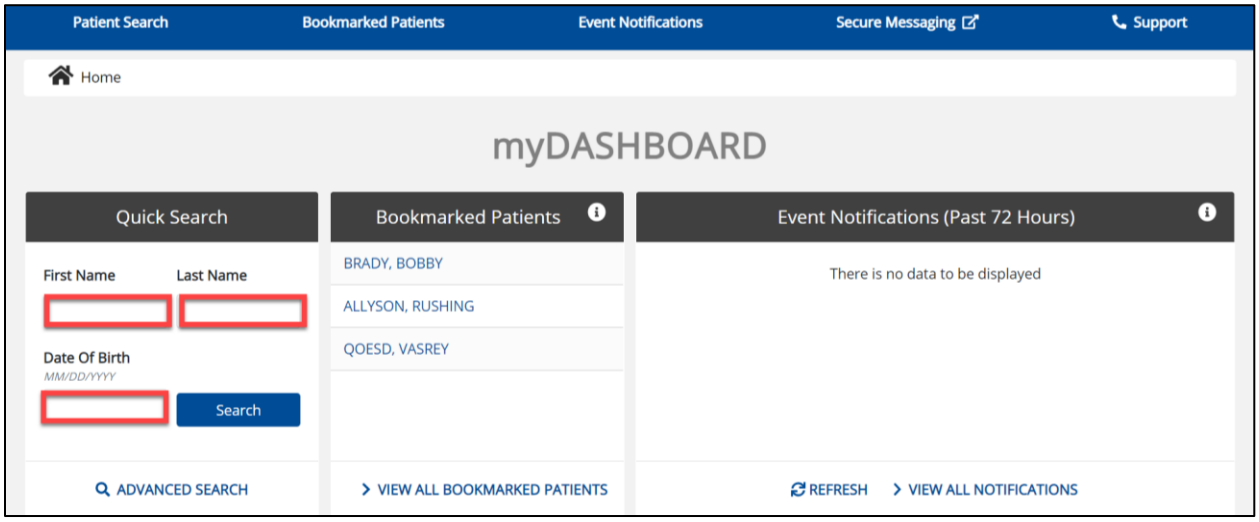
The User Profile allows you to manage your preferences and logout of the ePartnerViewer.

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*.

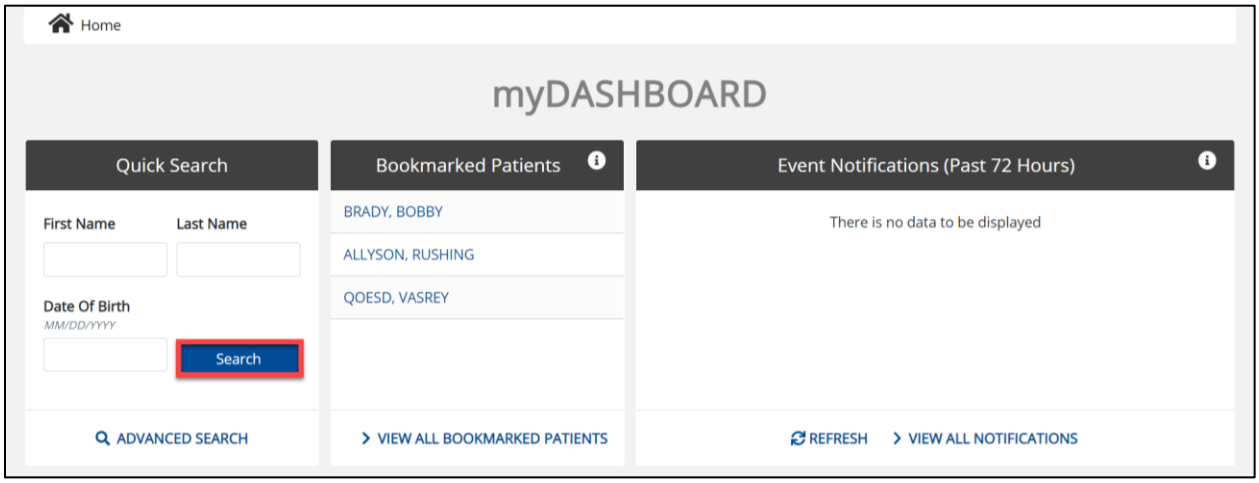
Quick Search for a Patient

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).

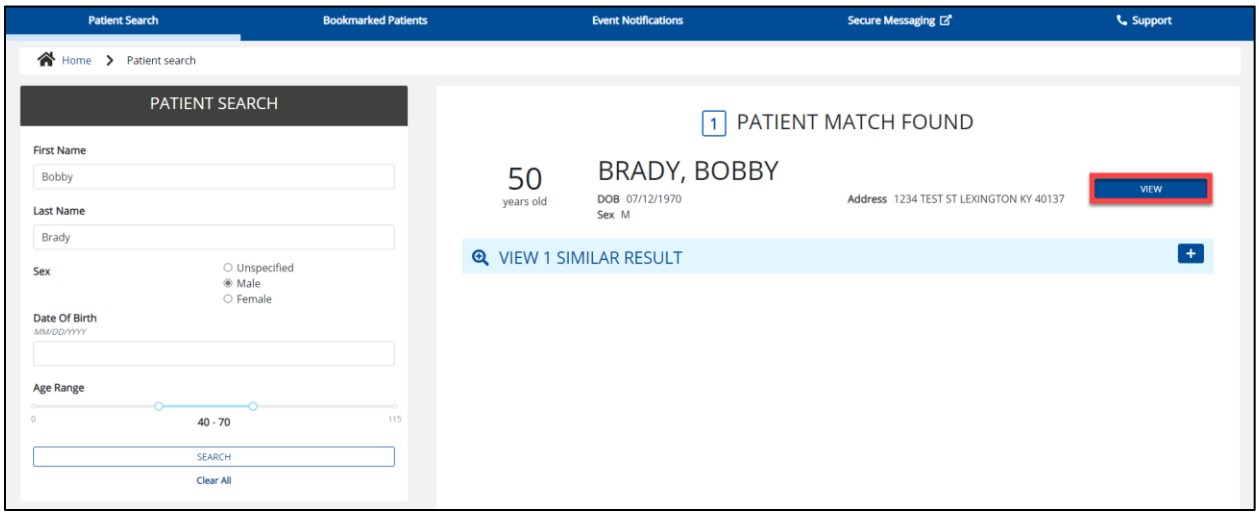


Please Note: A search using only the patient's first and last names may return multiple patient results. Entering additional search criteria such as the date of birth may narrow the matching patient search result(s).

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



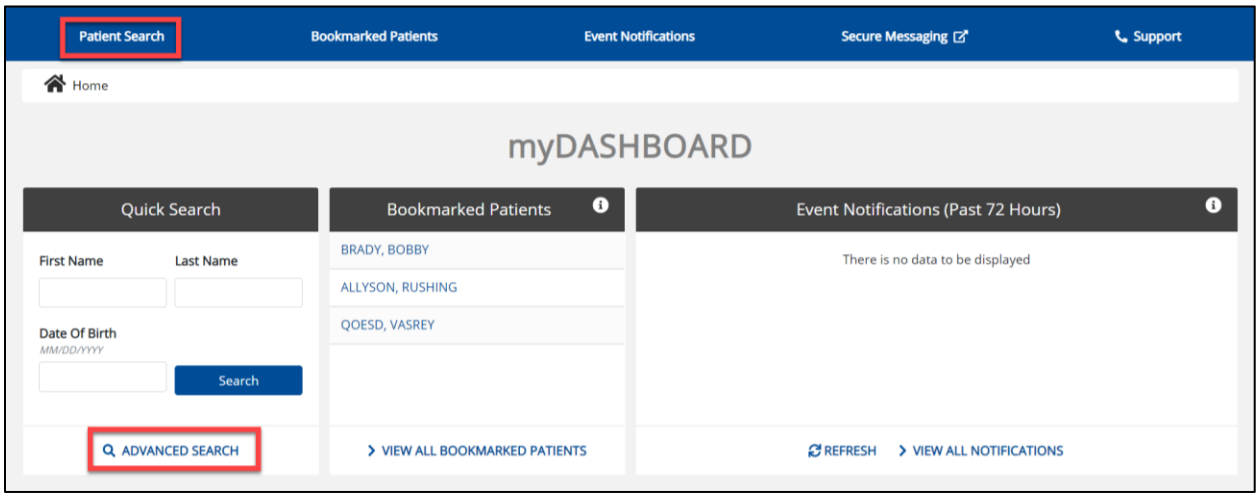
4. Click **View** to review the patient's chart.



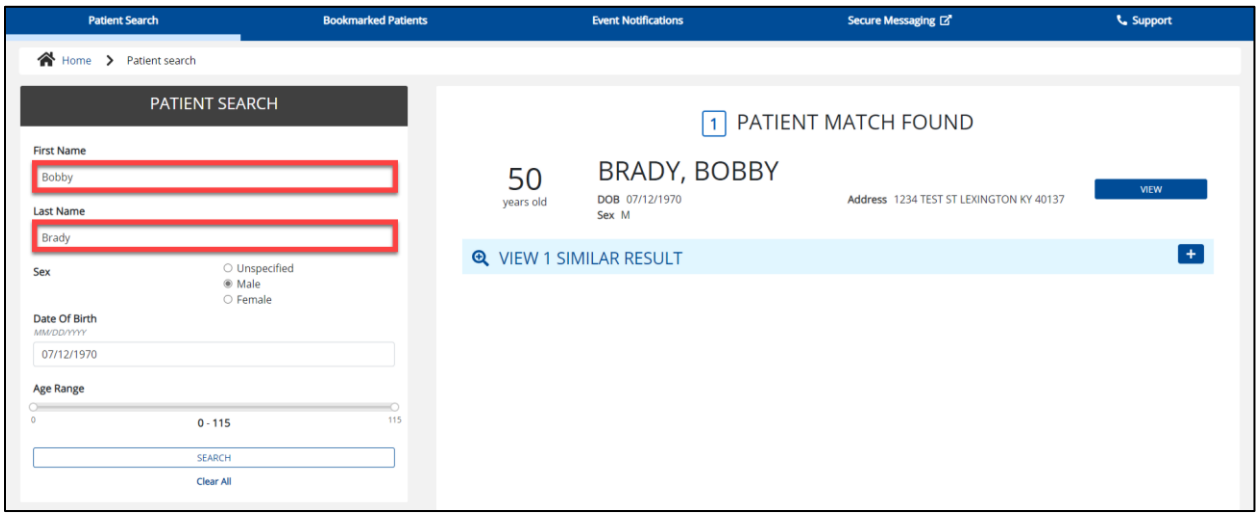
Advanced Search

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**.



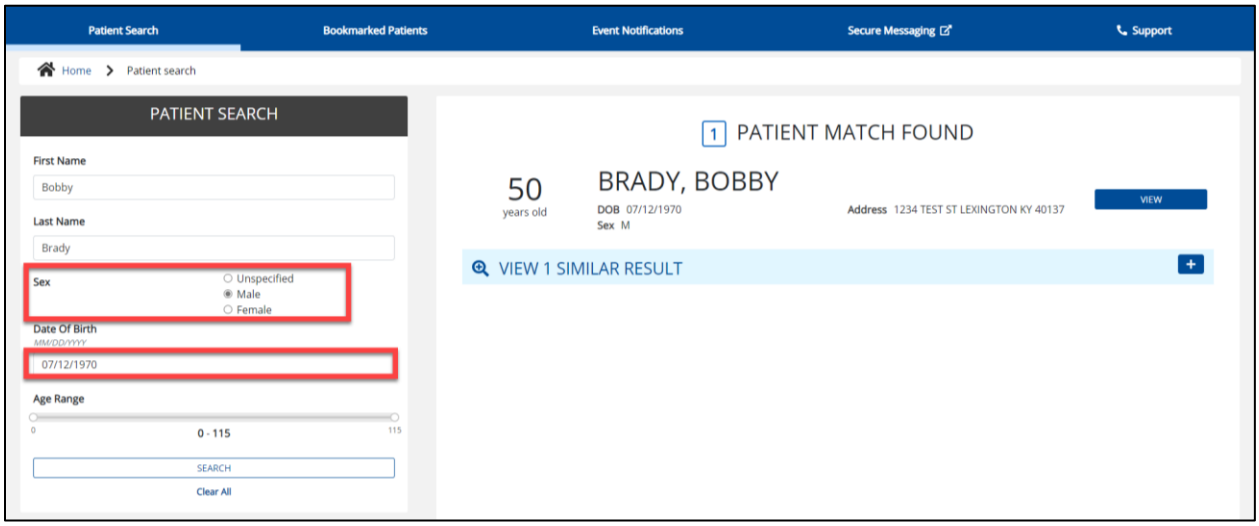
2. On the **Patient Search** screen, enter the Patient's **First Name** and **Last Name**.



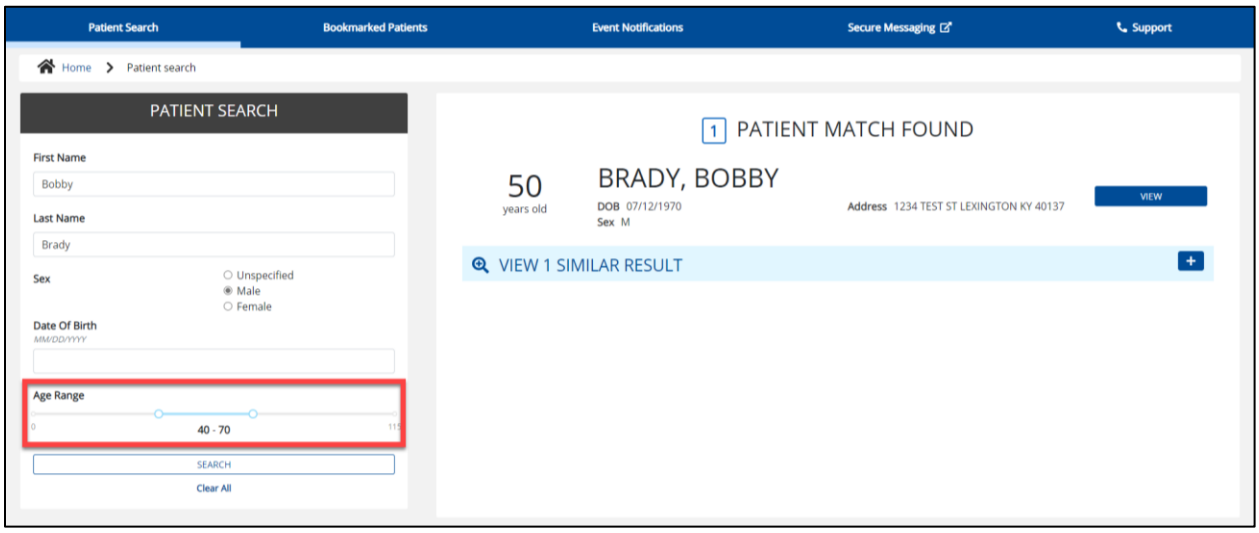
Please Note: First Name and Last Name are mandatory fields. If users attempt to search for a patient without entering **First Name and Last Name**, the **Patient Search** screen displays the following messages in red under the respective fields:

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

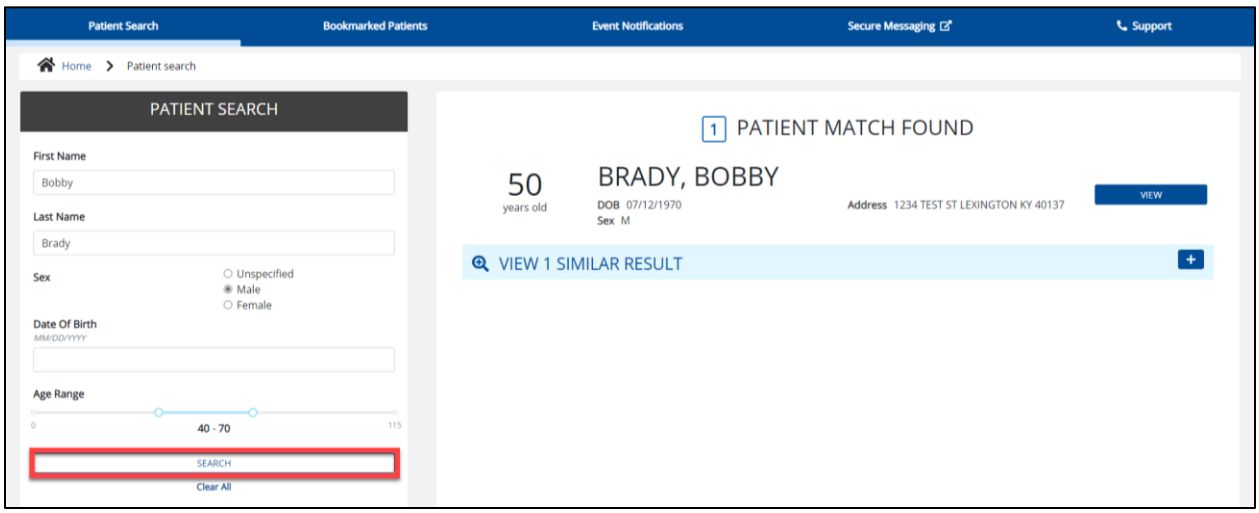
3. Select the patient's **Sex**.
4. Enter the patient's **Date of Birth**. To enter the Date of Birth, enter two digits for the month, two digits for the day, and two digits for the year.



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

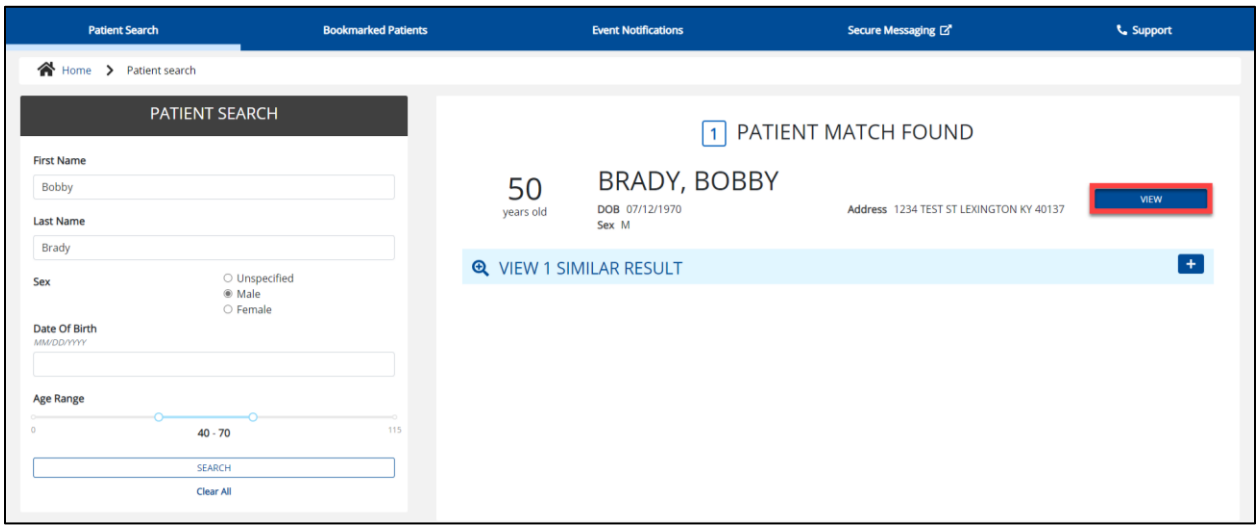


6. Click **Search** to initiate the search. The search results display on the right side of the page.

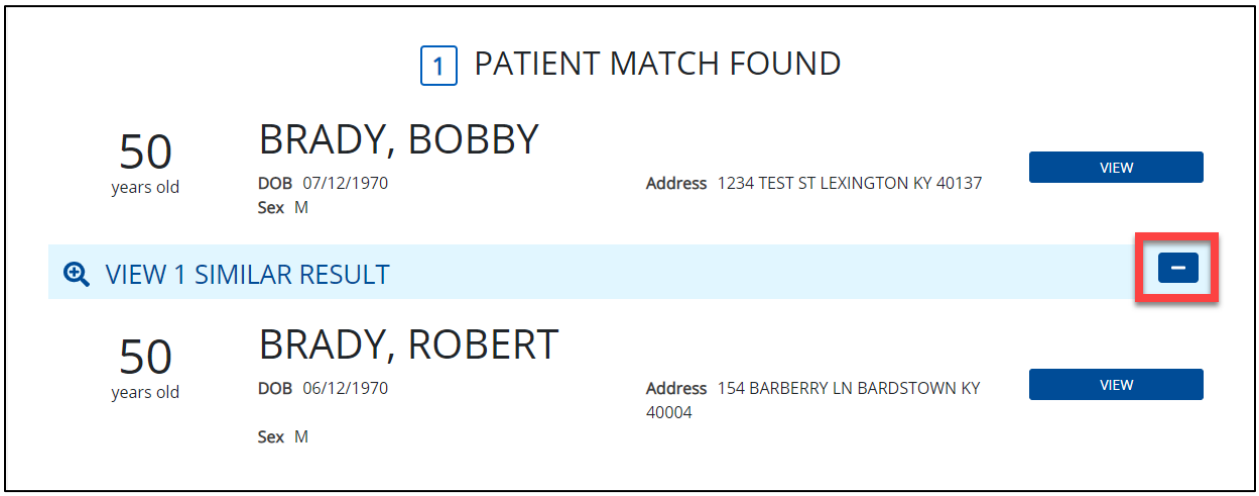


Please Note: Users can click **Clear All** to clear the search fields and quickly search for a new patient.

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



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.



7 Basic Features in the Patient Chart

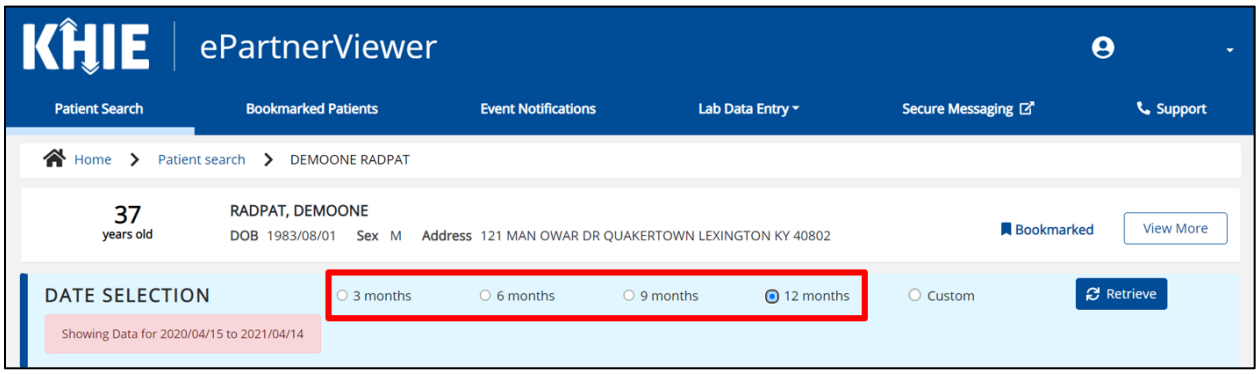
The purpose of this section is to briefly describe the basic features of the Patient Chart in the ePartnerViewer.

Date Selection

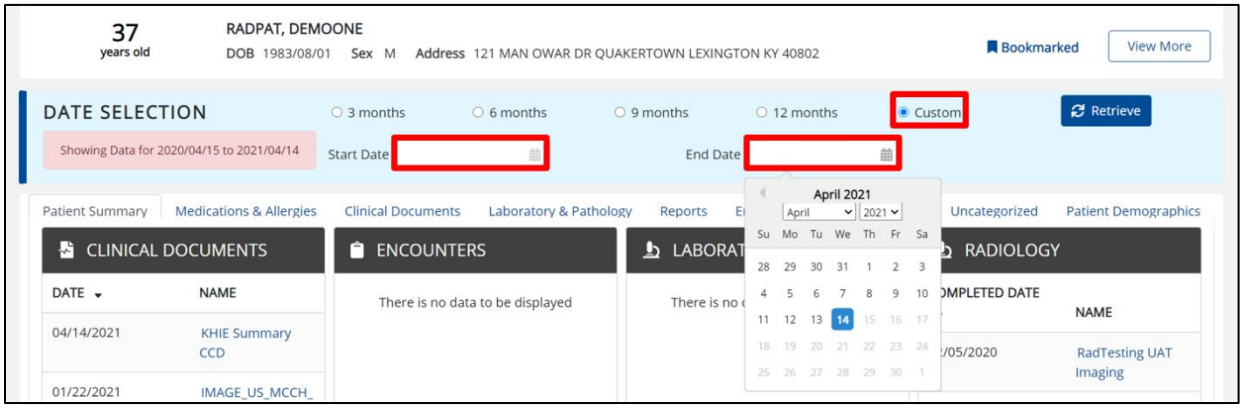
The Date Selection feature allows users to control how much data is retrieved for a patient. For example, when a search is initiated, the ePartnerViewer's **standard default** is set to retrieve the last twelve (12) months of data for a patient. You can change the default setting in *Preferences* located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

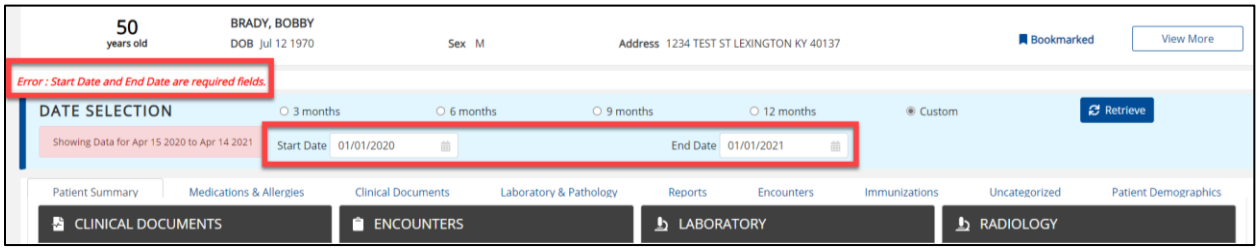


2. Select **Custom** to retrieve data for specific date range.
    - Enter the **Start Date** and the **End Date**.



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

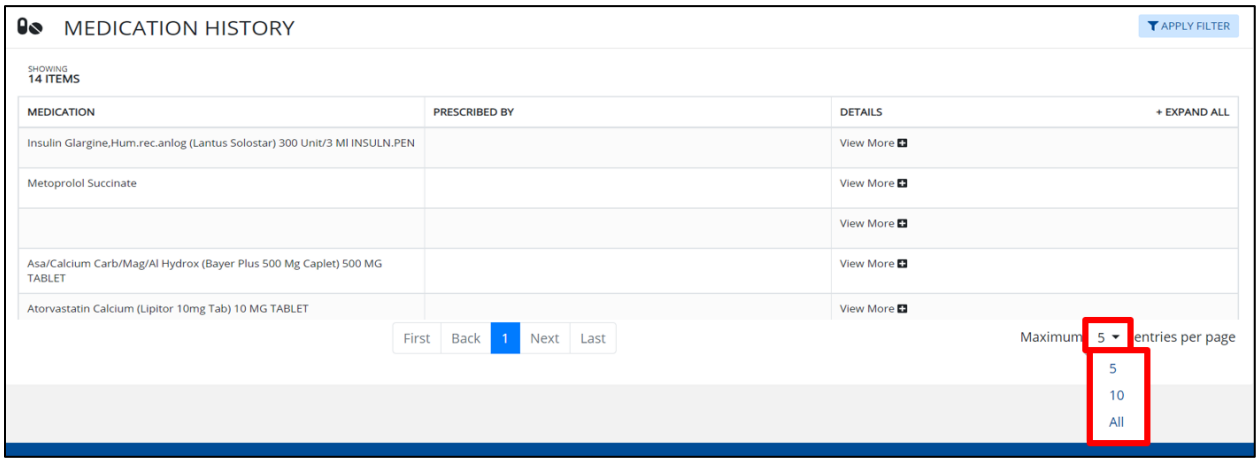
Throughout the patient chart, Users navigate through multiple pages of data. Using the pagination buttons, select a specific page number, move to the next or previous page, or move to the first or last page of a list.

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.

Controlling the Number of Entries that Display

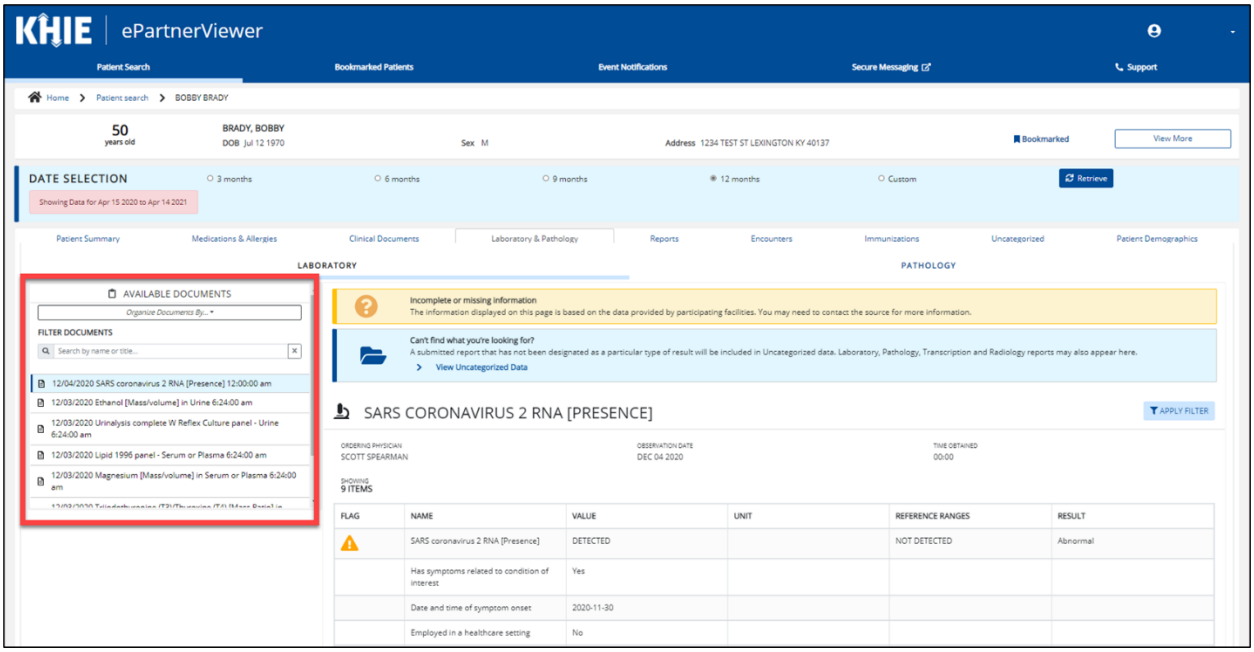
Users can control the number of entries that display per page. For example, you may prefer to see only five (5) entries per page or you may prefer to see all entries available on one page.

1. Select **5** to show five entries on the page.
2. Select **10** to show ten entries on the page.
3. Select **All** to show all the entries available on the page.

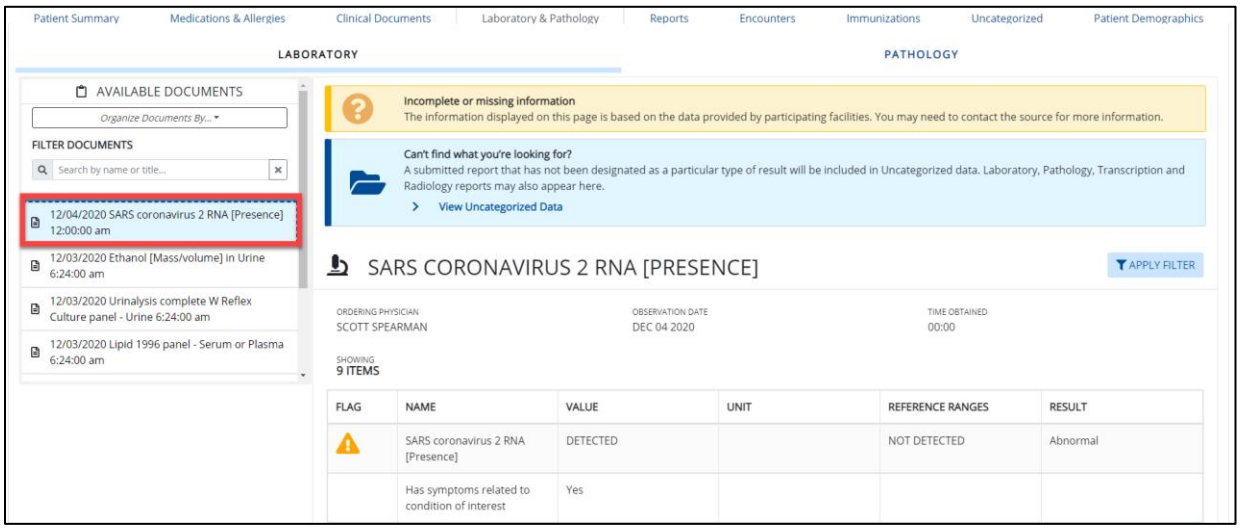


Available Documents and Filter Documents

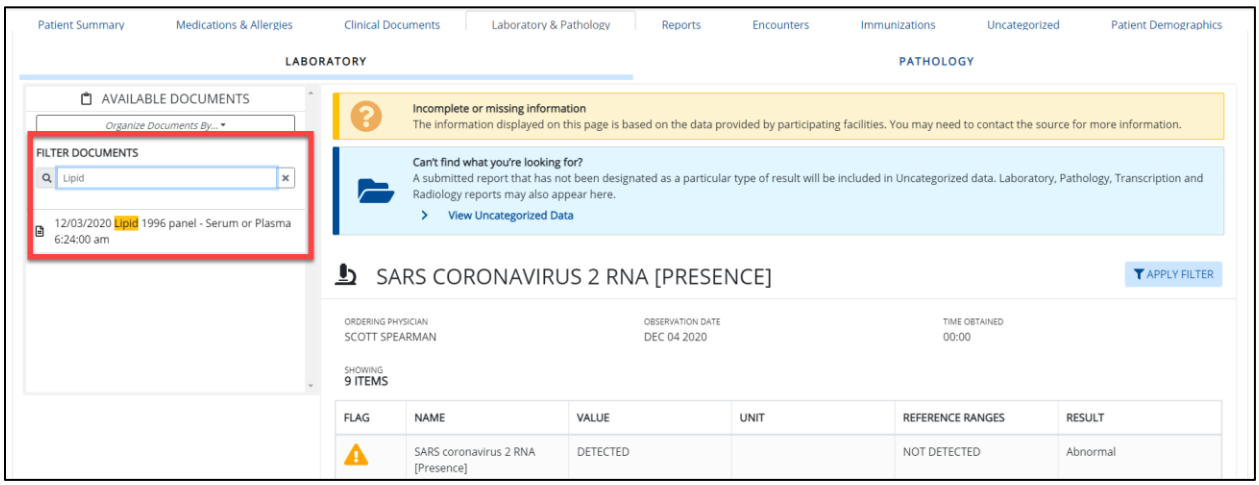
Tabs and Portlets in the Patient Summary contain lists of Available Documents for review. There are several methods of sorting and filtering these lists within the patient chart.



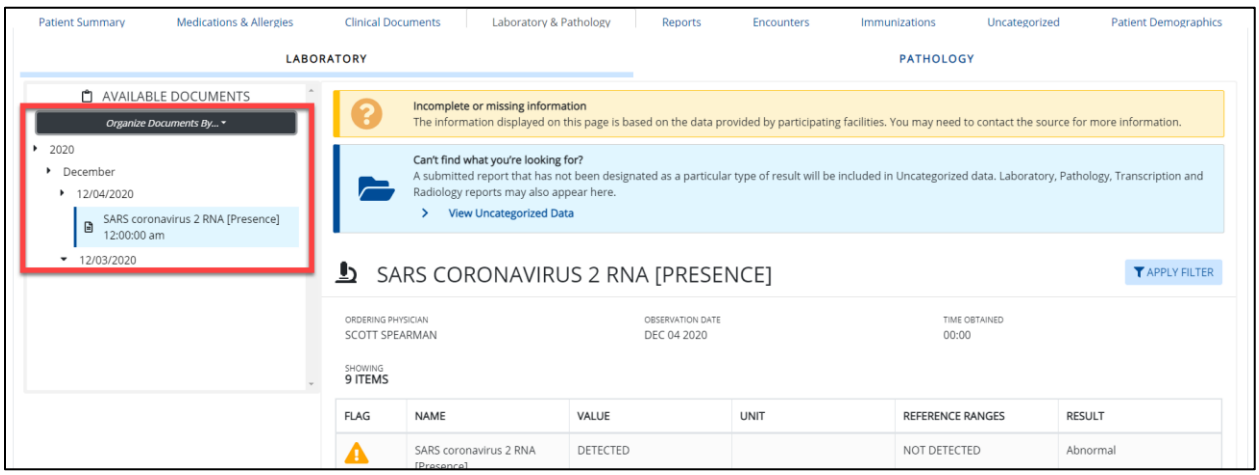
1. Select an **Available Document** to review it. The document opens on the right side.



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



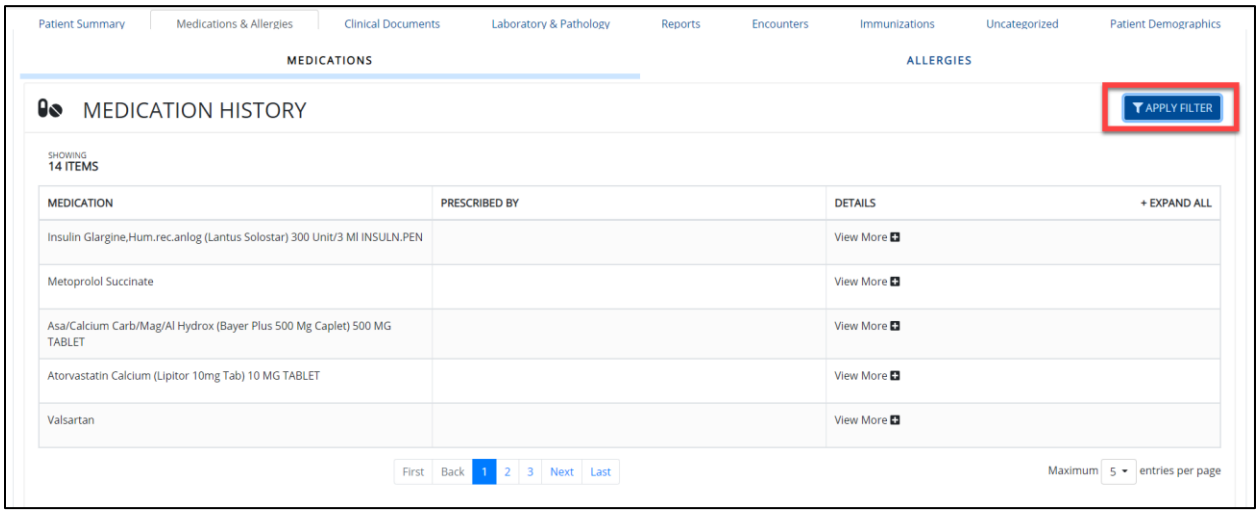
3. Select **Organize Documents By** to organize the list of available documents by date or to list all available documents.



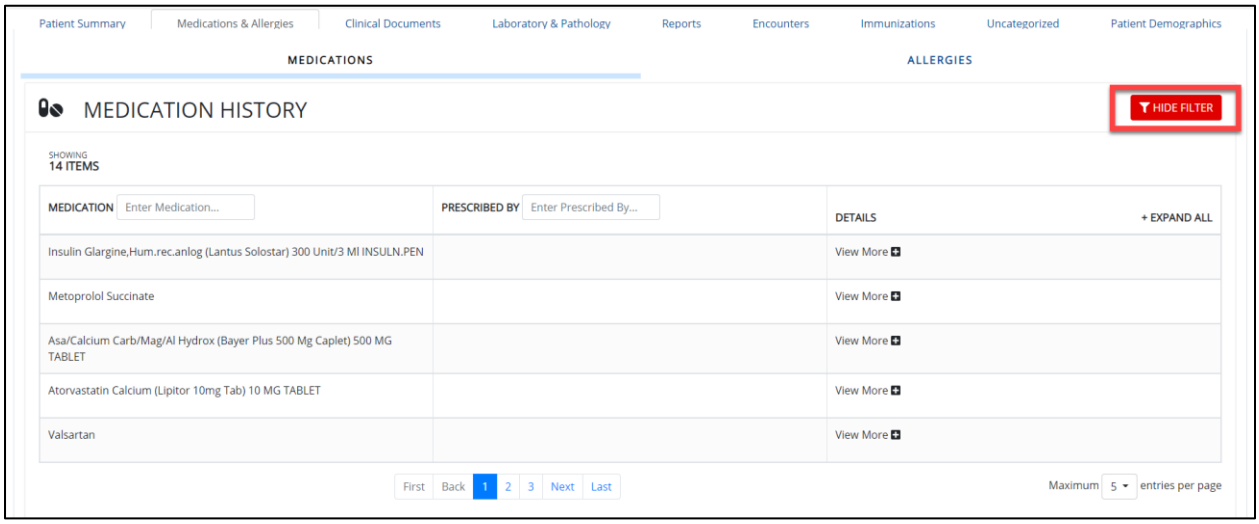
Applying a Filter

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.



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



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
	Abnormal Result	Indicates a report contains abnormal value(s)
	Critical Result	Indicates a report contains value(s) that are of a critical nature
	Unbookmarked Patient	Indicates the patient chart is not bookmarked; the user can elect to add the selected patient to the Bookmarked Patients list
	Bookmarked Patient	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.

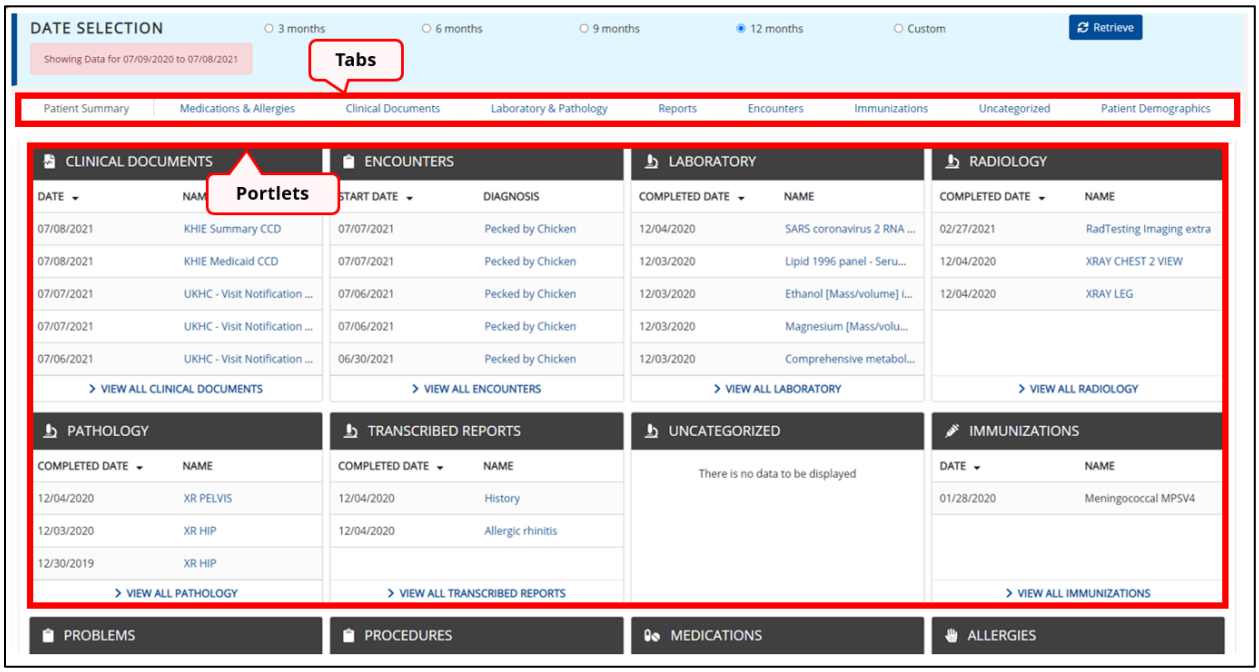
8 The Patient Chart

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.

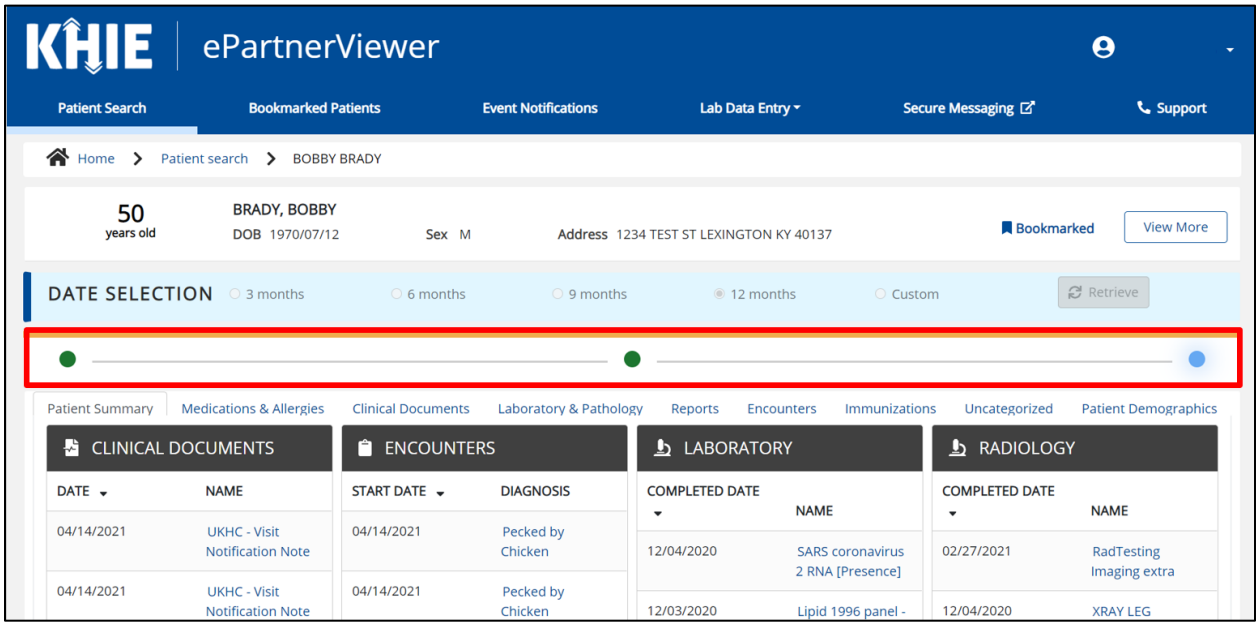
You may choose to view the clinical information in either the Tabs or the Portlets. The key difference between the two is that the Portlets are designed to provide a quick and easy *Patient-at-a-Glance* view of the most recent data available on a patient.



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.



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.

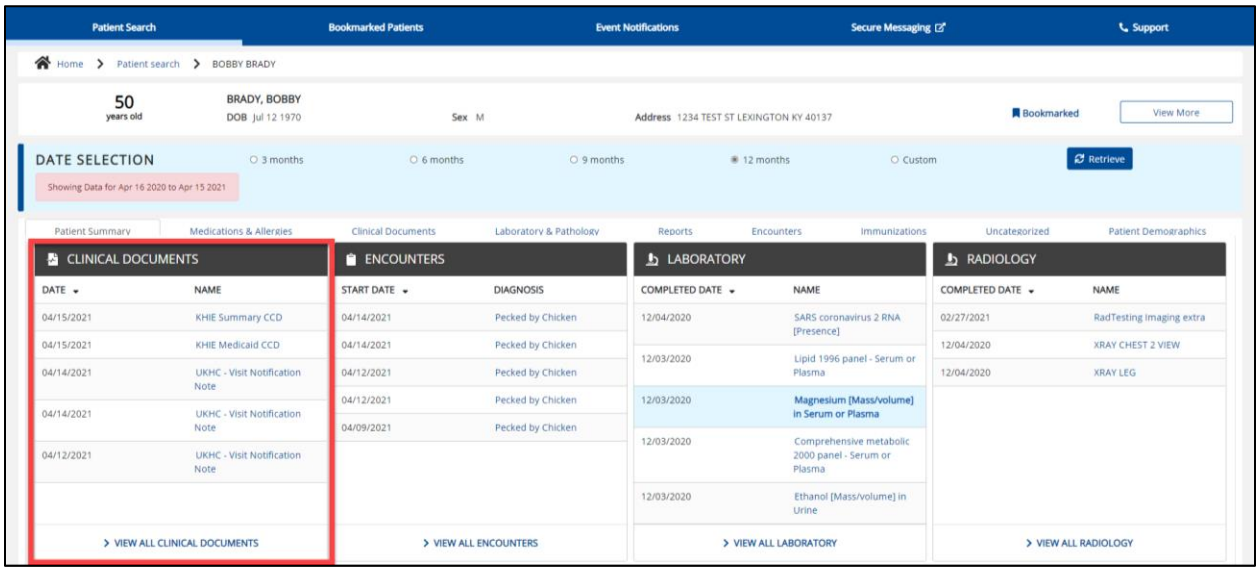
Patient-at-a-Glance (Patient Summary)

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

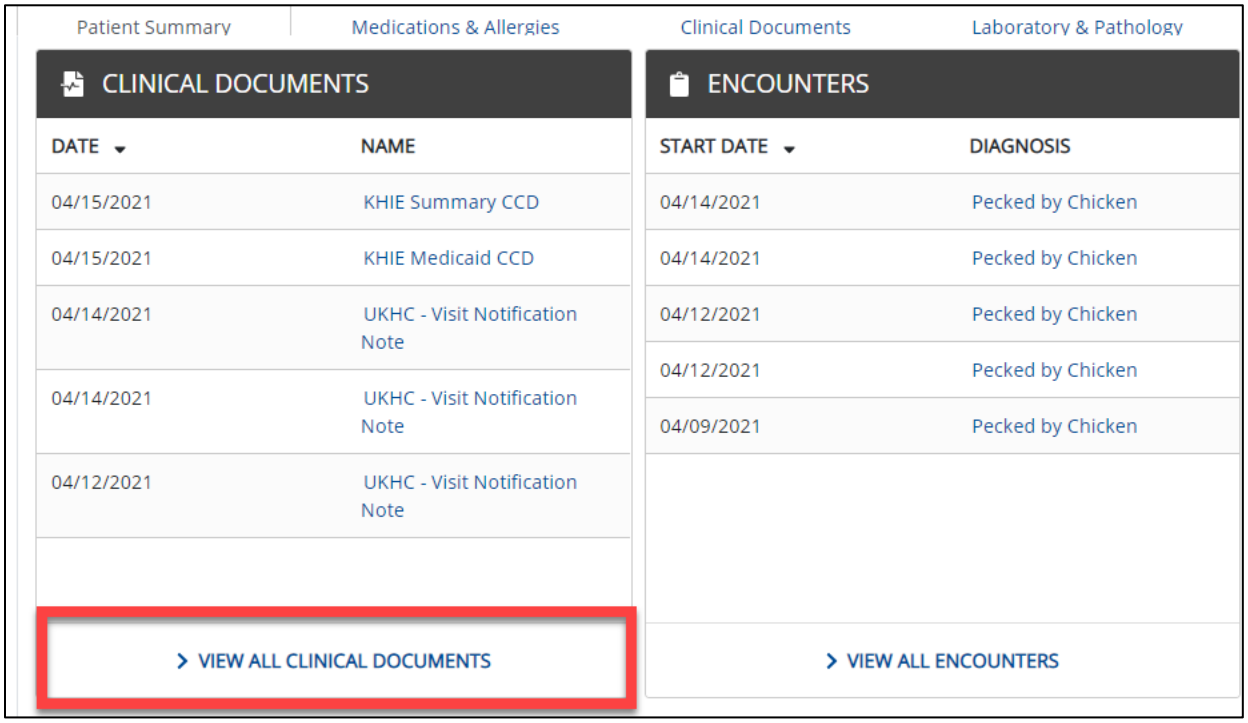
You can arrange and/or hide the Portlets to fit your specific needs. This is covered in *Section 12 Managing User Preferences*.



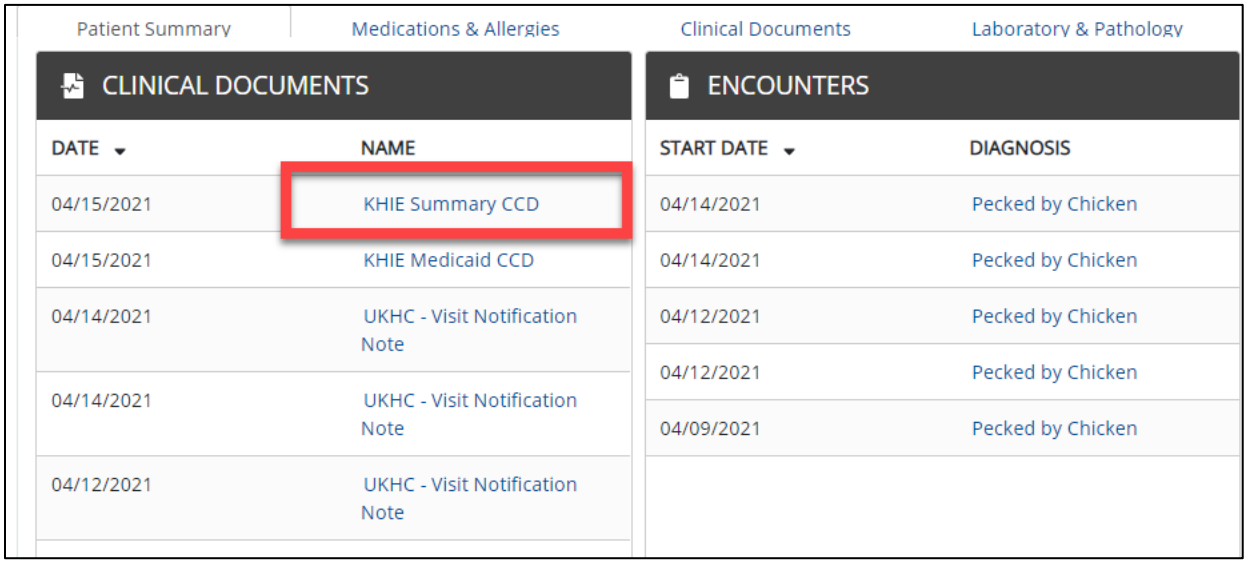
Please Note: When there is KASPER data available on a patient, Users with existing KASPER access can click on the *PDMP Program Portlet* to retrieve the KASPER report. The report can be viewed in the *PDMP Program Portlet* and in the *Clinical Documents Portlet*.

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.



2. Click the **Document Name** to open that specific document.



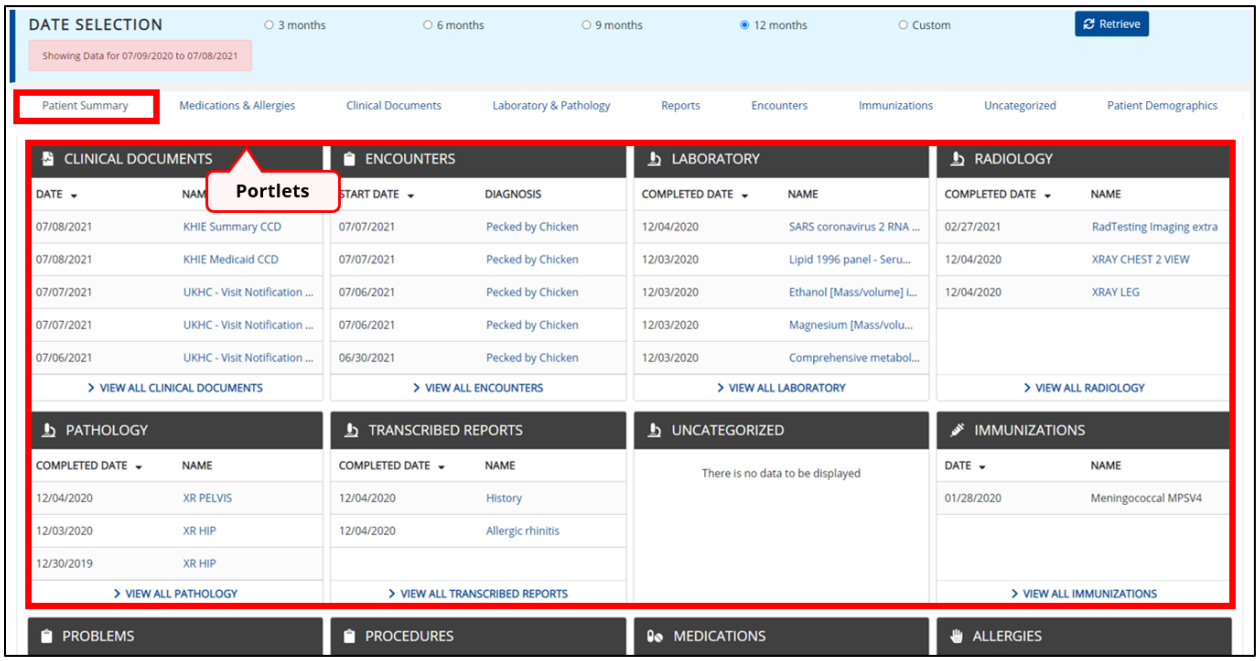
Please Note: Not all documents contain hyperlinks. Only those **Document Names** with hyperlinks can be opened to view a report in its entirety. **Document Names** with hyperlinks display as light blue text within the respective Portlet.

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.

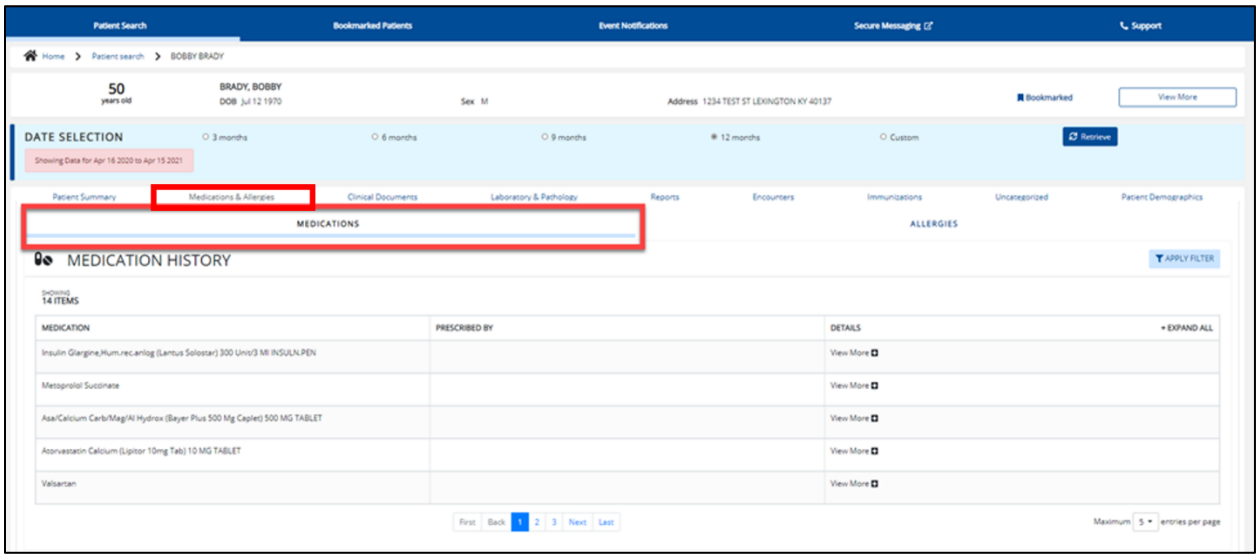
The **Patient Summary** tab displays the Portlets which show the most recent patient data 'at-a-glance'. The Portlets can be customized to meet your specific needs.

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

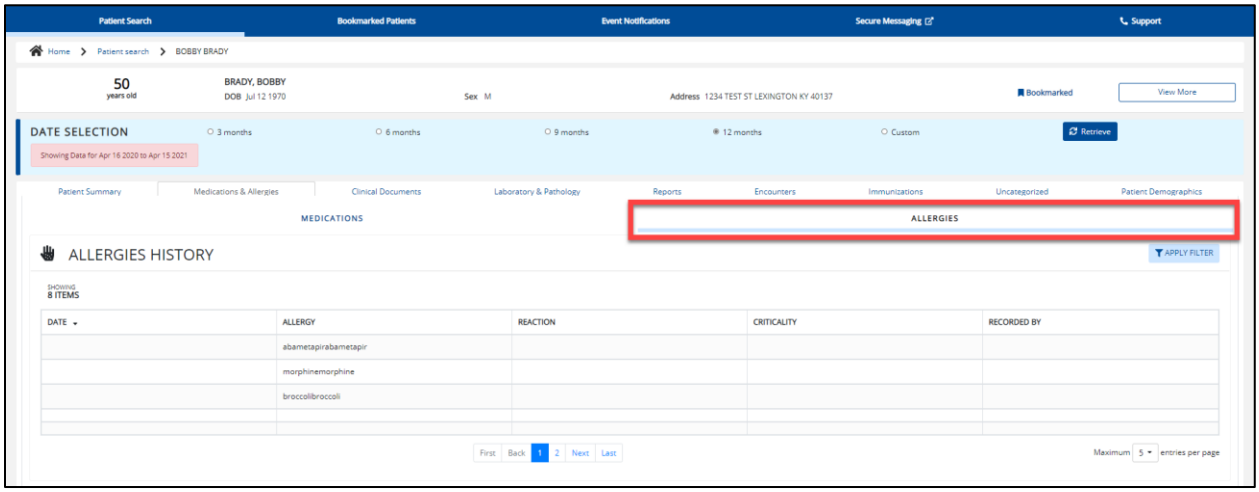


The **Medications & Allergies** tab contains the patient's medication list and known allergies.

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



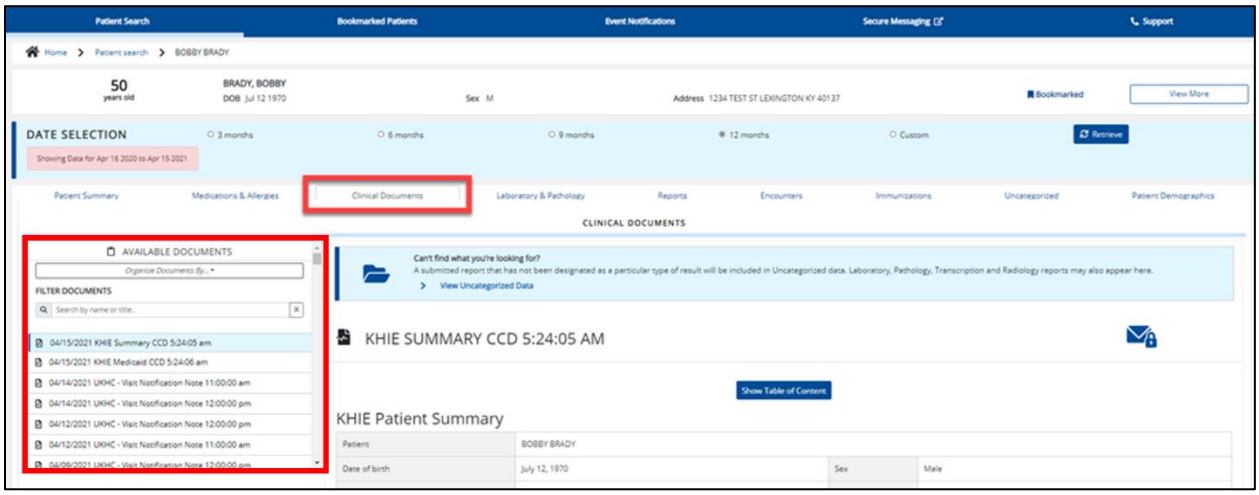
3. Click **Allergies** to review the *Allergies History.*



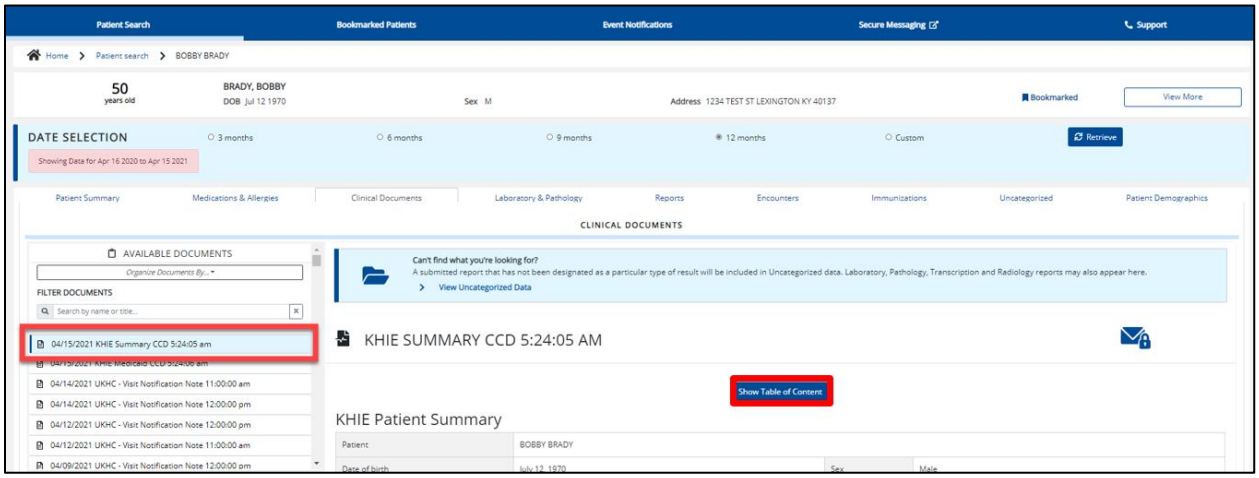
The **Clinical Documents** tab contains all available Continuity of Care Documents (CCDs) and other clinical summaries such as hospital admission & discharge summaries and office visit summaries.

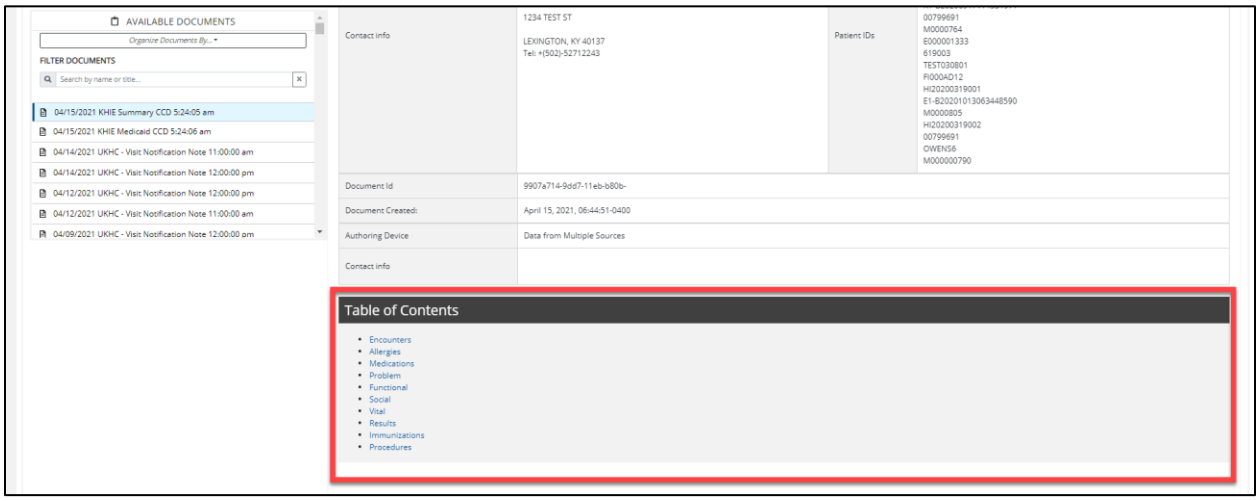
- The **KHIE Summary CCD** represents a consolidation of most all data available on a patient all in one place for a 'one-click' quick access to a patient's health history.
- The **Medicaid Claims Data CCD** represents all of the claims paid on behalf of a Medicaid patient.

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

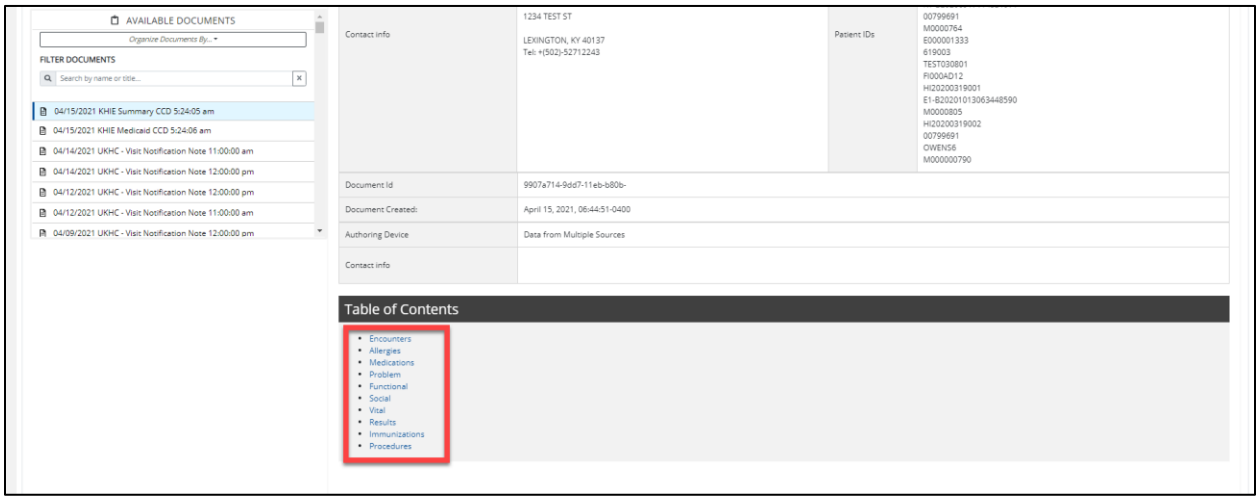


5. Select a **Document Name** from the *Available Documents* list located on the left side.
6. Click **Show Table of Content** to view the document's *Table of Contents*.

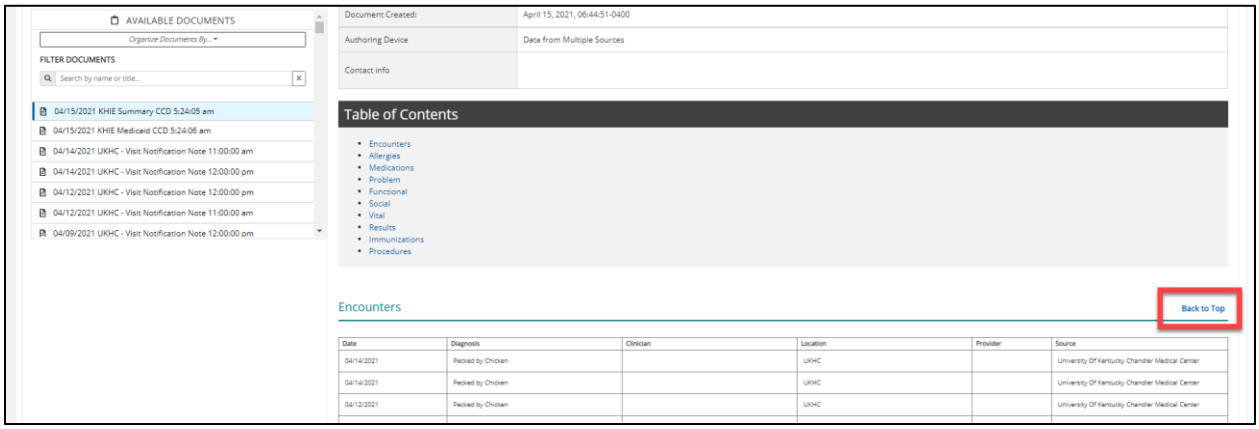




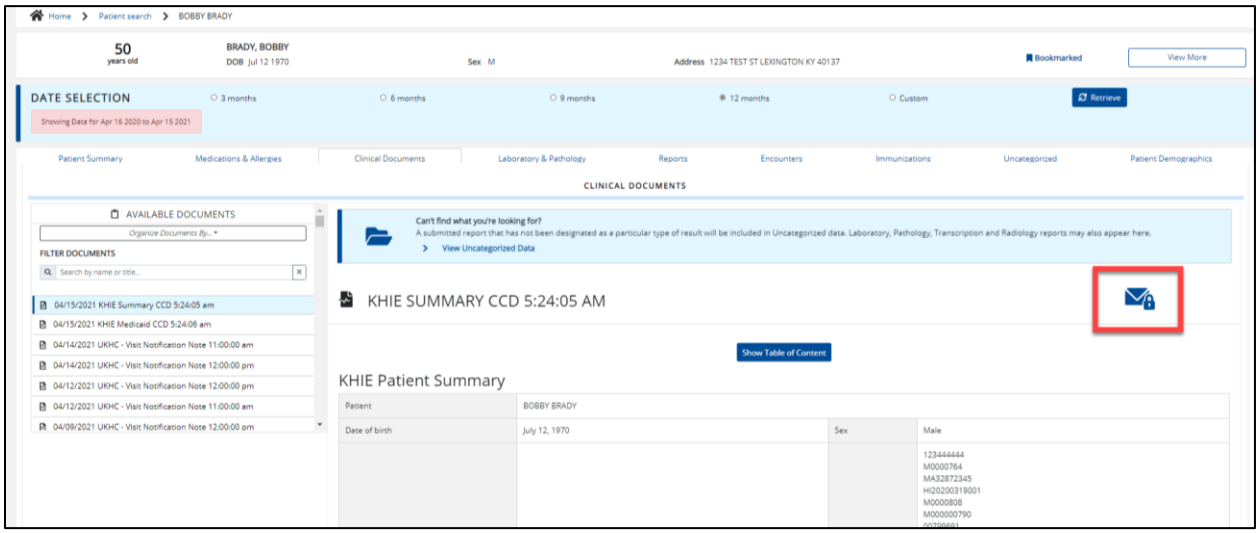
7. Select a **Section Header** to navigate to that section of the document.



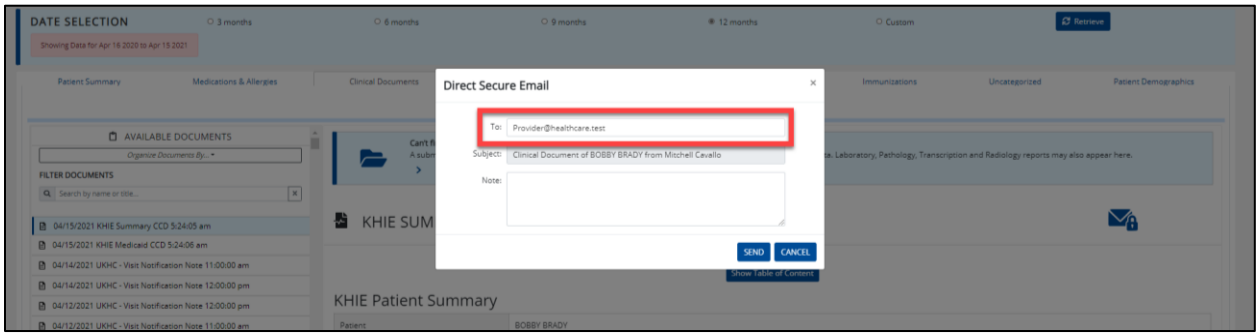
8. Select **Back to Top** to navigate back to that document's table of contents.



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

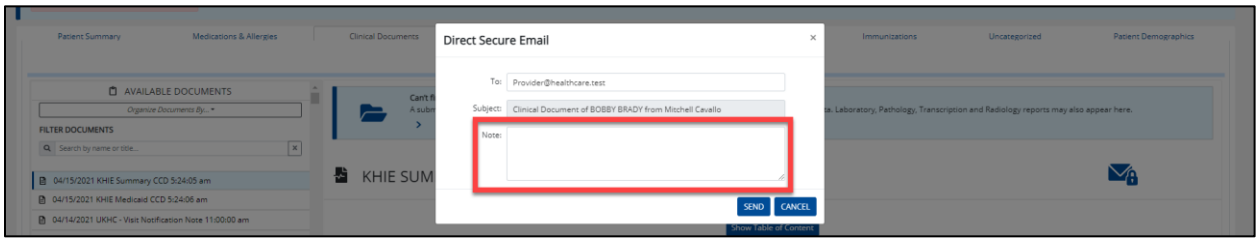


10. Enter the **Direct Secure Email Address** of the intended recipient(s).

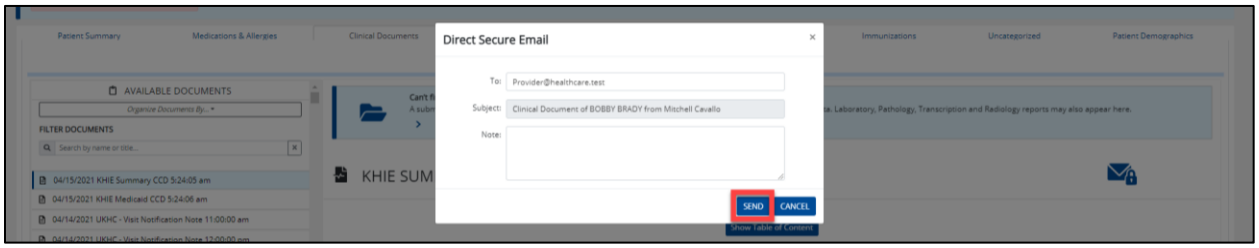


Please Note: To send to multiple addresses at once, Users must separate individual email addresses with a semi-colon. The sender isn't required to have a direct secure email address BUT the recipient is.

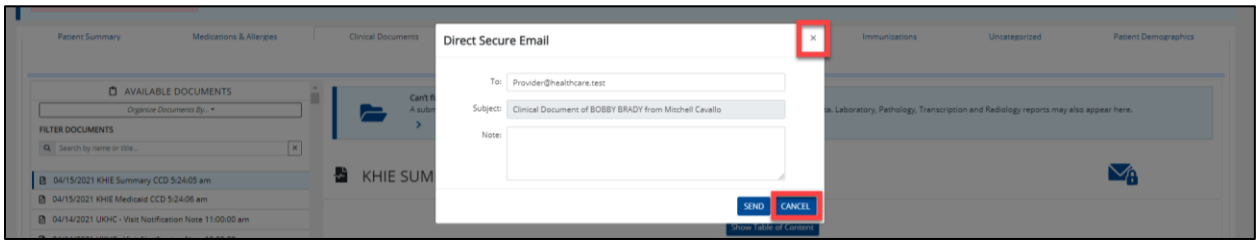
11. Enter a **Note** describing the contents and purpose of the Direct Secure Email.



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

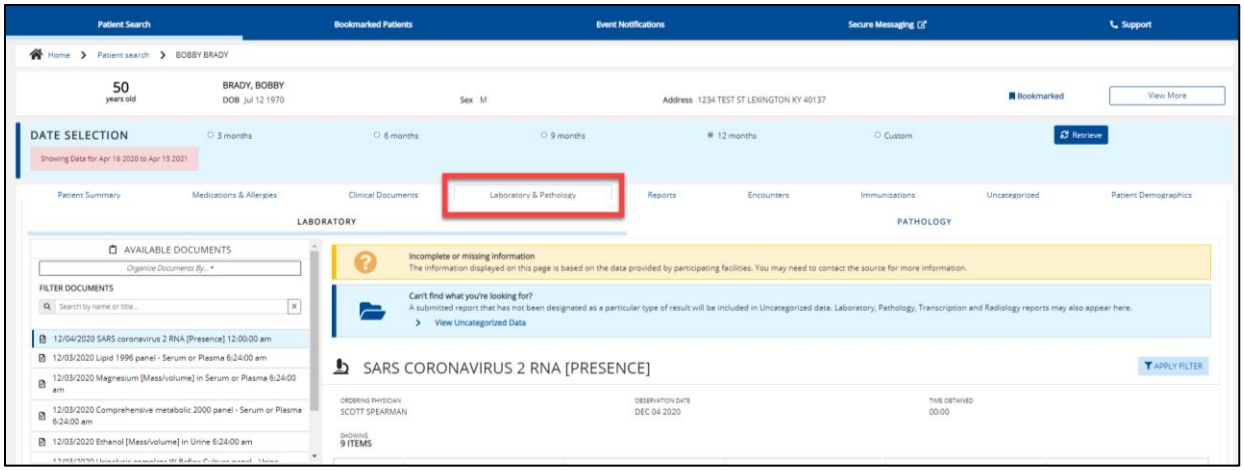


13. Click **Cancel** or click the **X** *in the top right* to exit the Direct Secure Email pop-up and discard the Direct Secure Email.

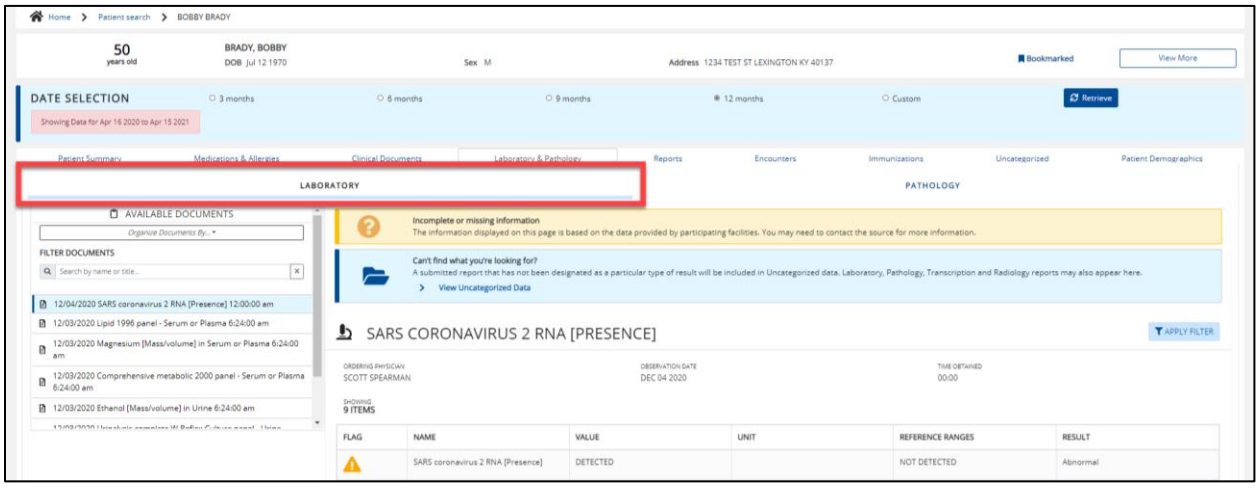


The **Laboratory & Pathology tab** contains a list of the laboratory and pathology result reports.

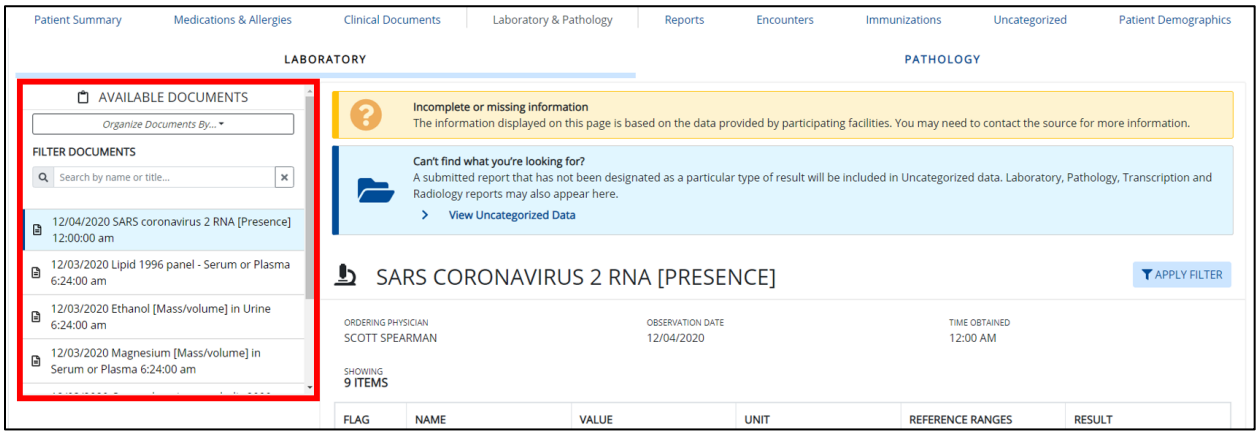
14. Click **Laboratory & Pathology** to open the Tab and review the **Laboratory & Pathology** reports.



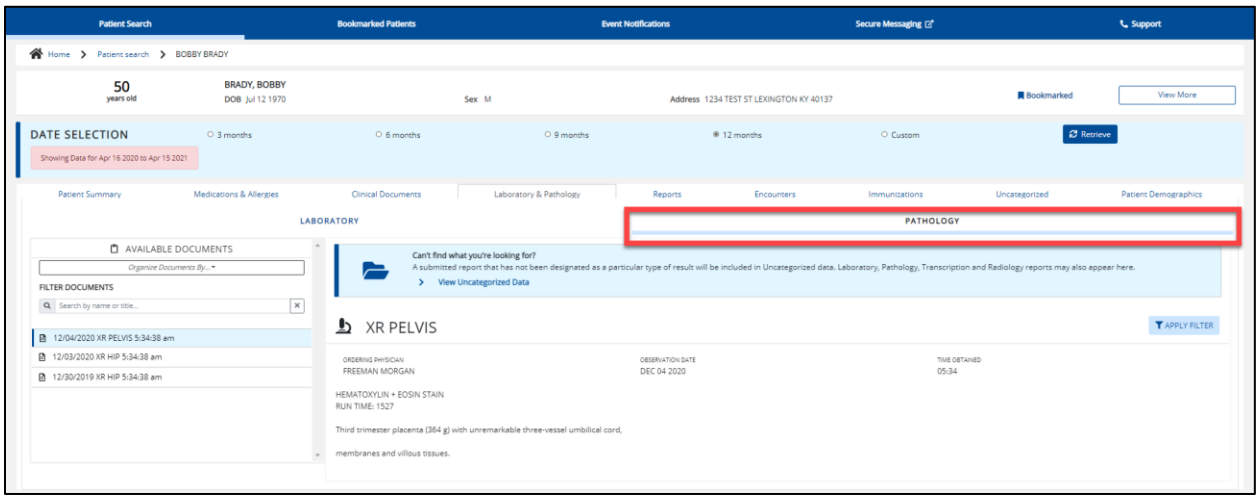
15. Click **Laboratory** to review Laboratory result reports.



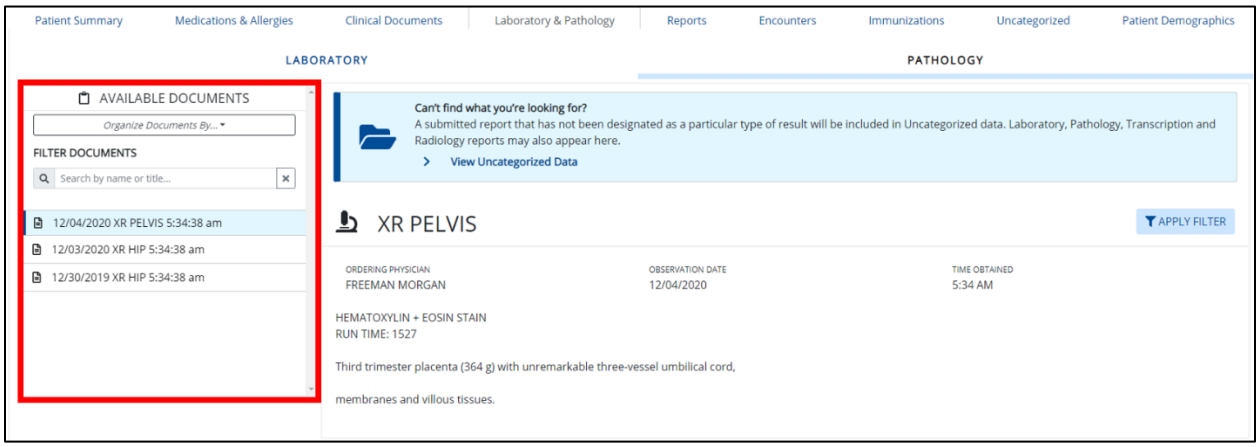
16. To review a Laboratory report in its entirety, select a result report from the **Available Documents** on the left side. The report will open on the right side.



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

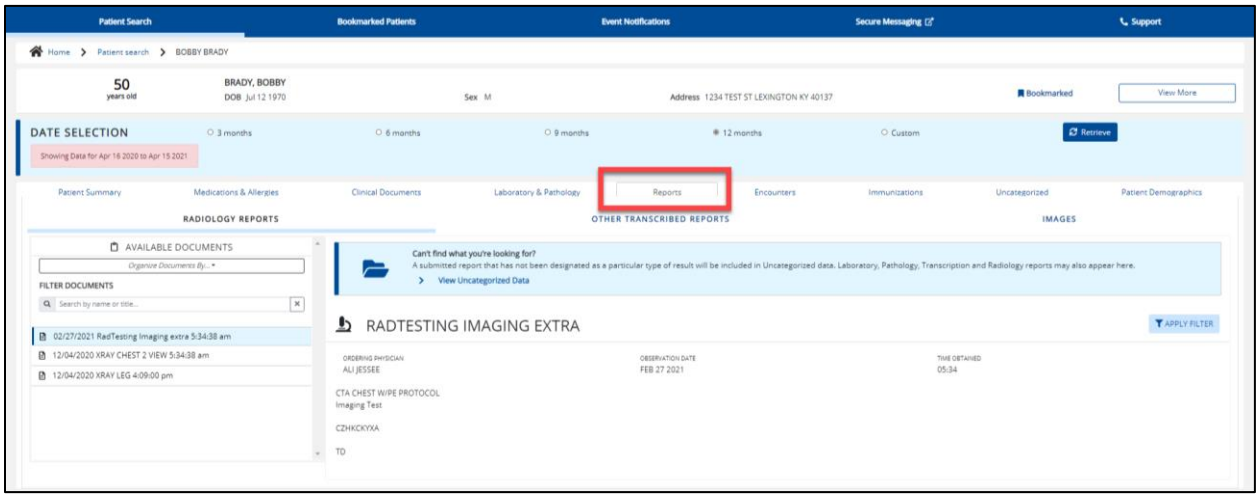


18. To review a Pathology report in its entirety, select a Pathology report from the **Available Documents** on the left side. The report will open on the right side.

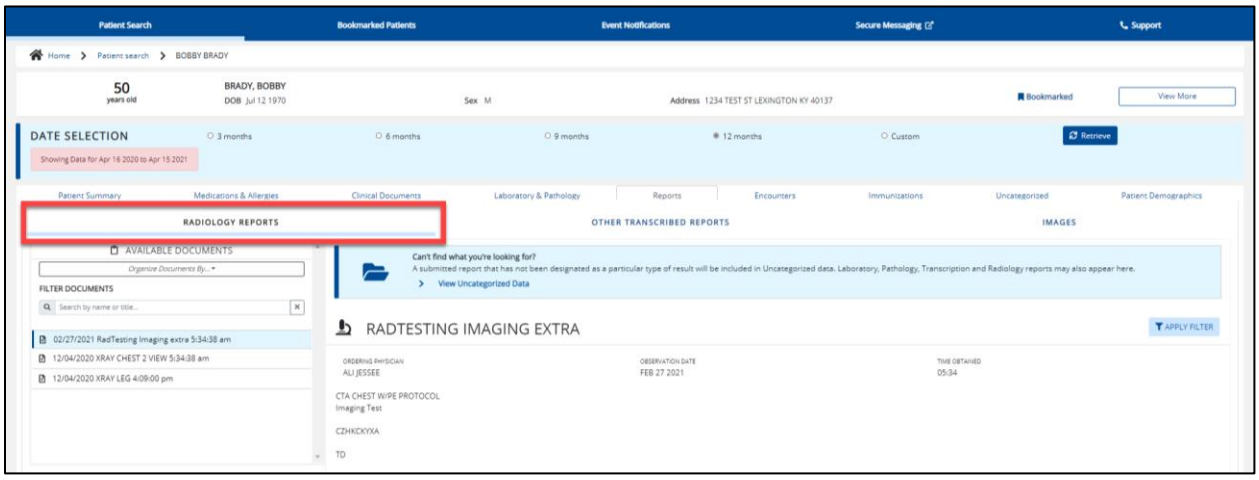


The **Reports tab** contains **Radiology Reports**, **Other Transcribed Reports**, and **Images**.

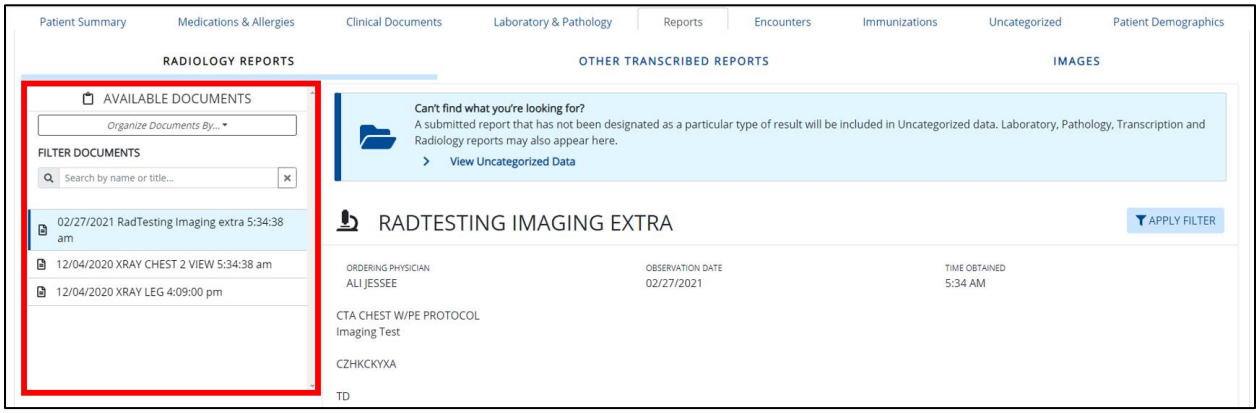
19. Click **Reports** to open the **Reports Tab** to view all reports.



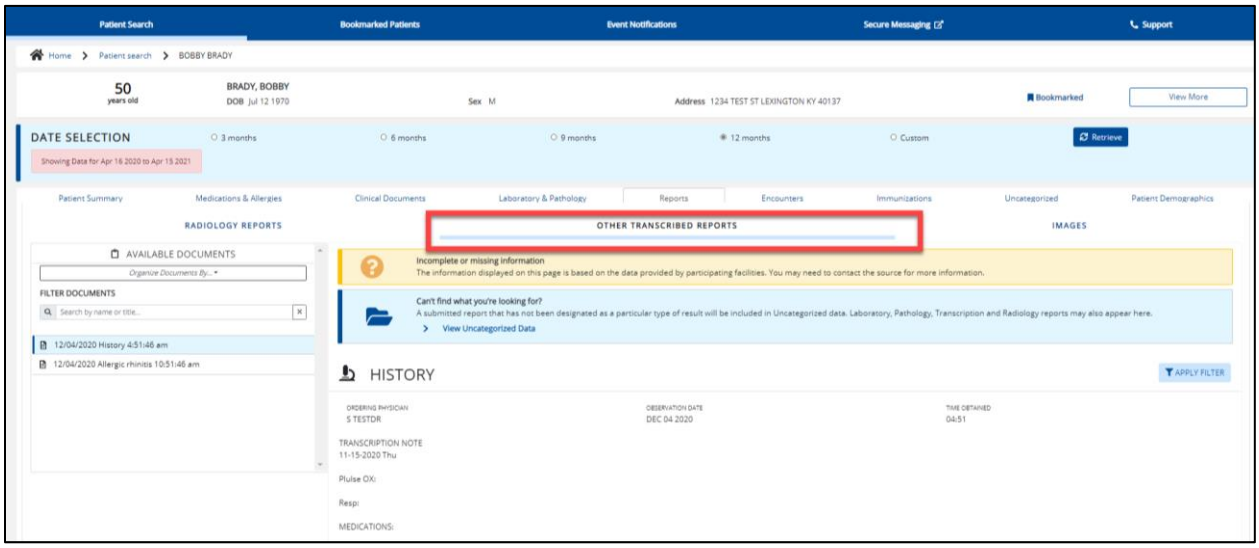
20. To review radiology reports, click **Radiology Reports**.



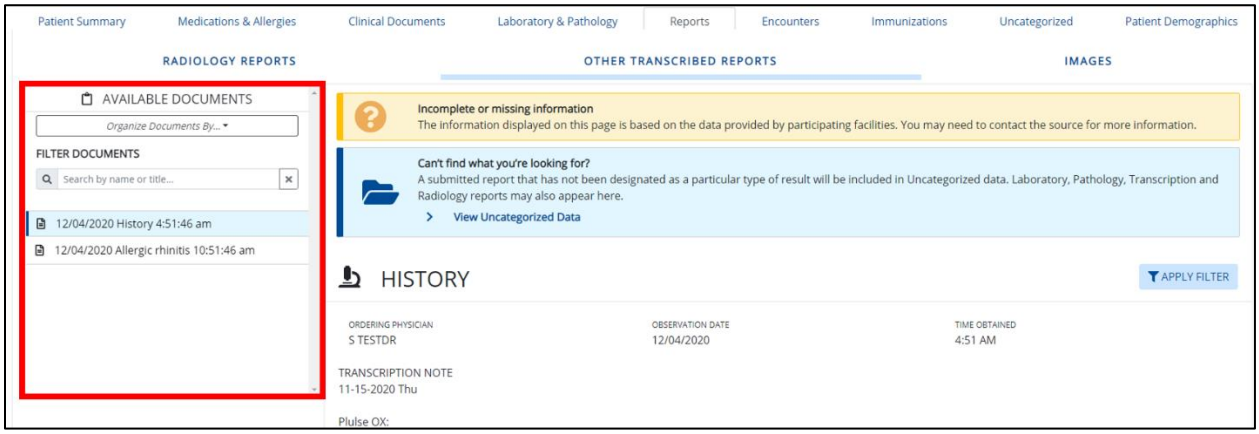
21. To review a transcribed Radiology Report in its entirety, select a radiology report from the **Available Documents** on the left side. The report will open on the right side.



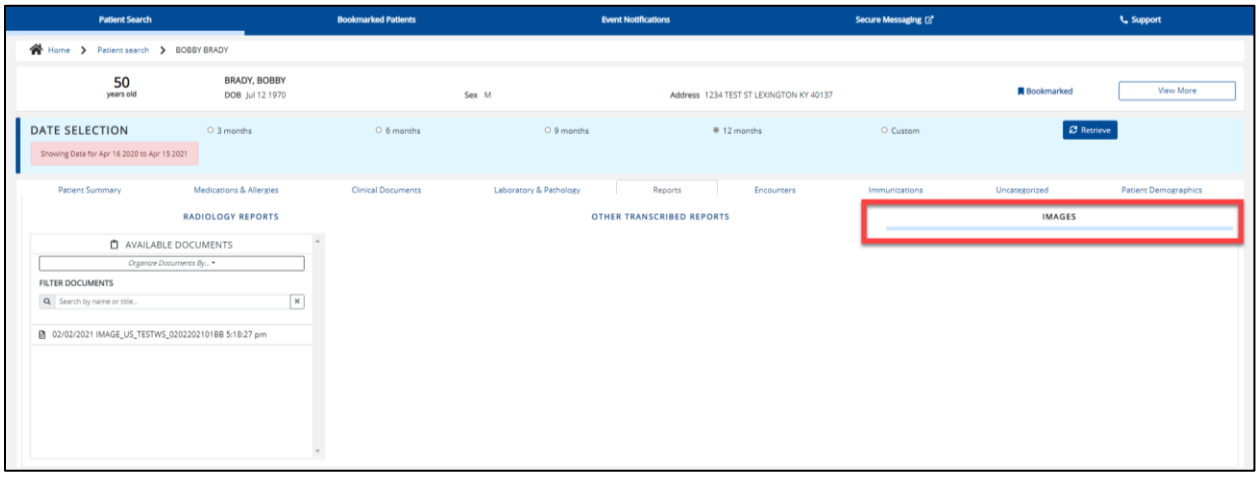
22. Click **Other Transcribed Reports** to review other types of transcribed reports.



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.



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

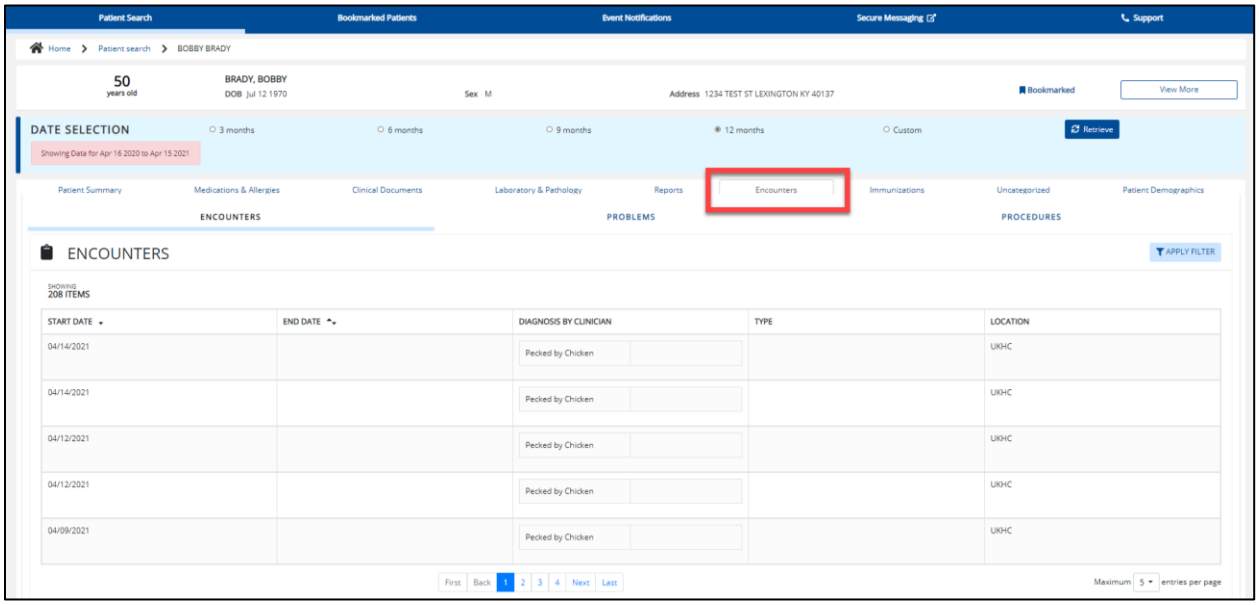


25. To review an Image, select an image document from the **Available Documents** on the left side. The report will open on the right side. Viewing and Exporting Images is covered in section 10.

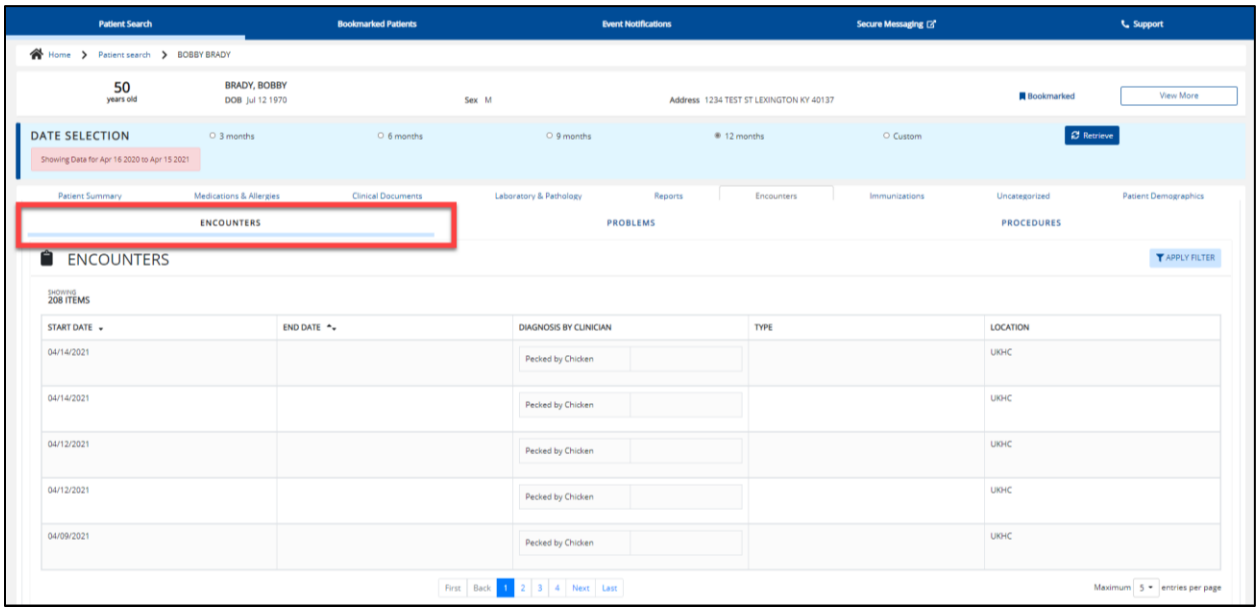
Please Note: *Section 10 Viewing and Exporting Radiology Images* covers the ePartnerViewer's imaging features in more detail.

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

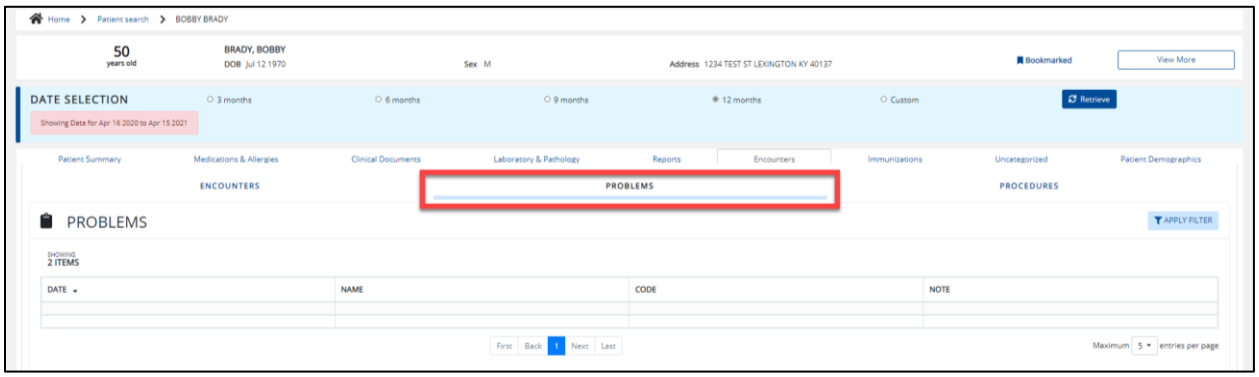
26. Click **Encounters** to open the **Encounters Tab** to review all reports.



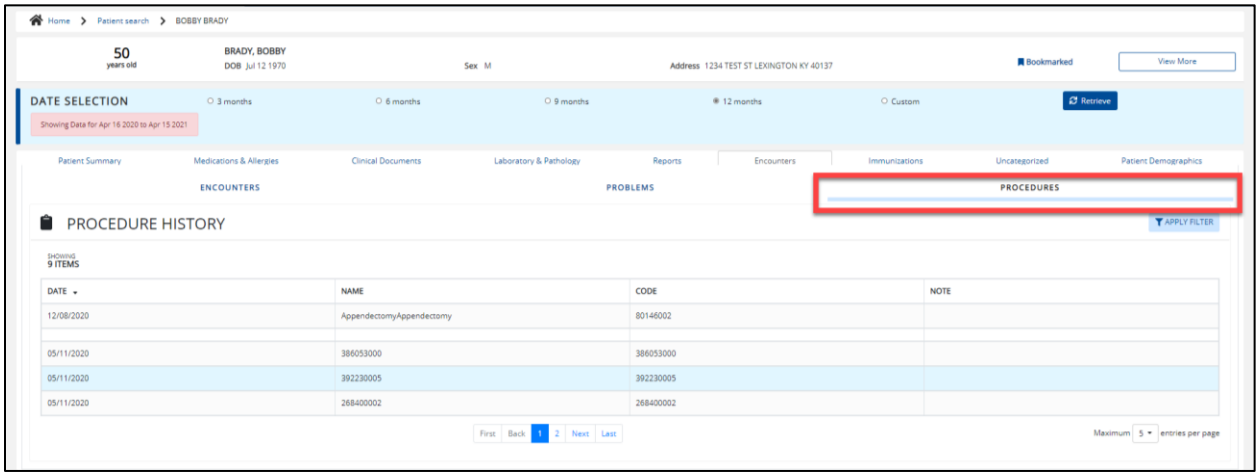
27. Click **Encounters** to review the Encounters history.



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

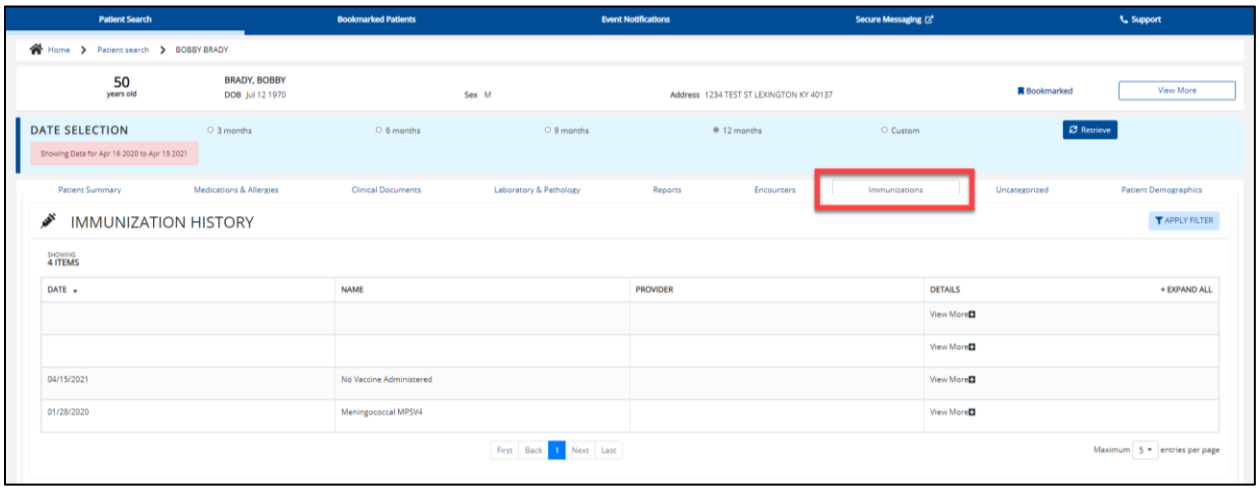


29. Click **Procedures** to review the Procedure History.



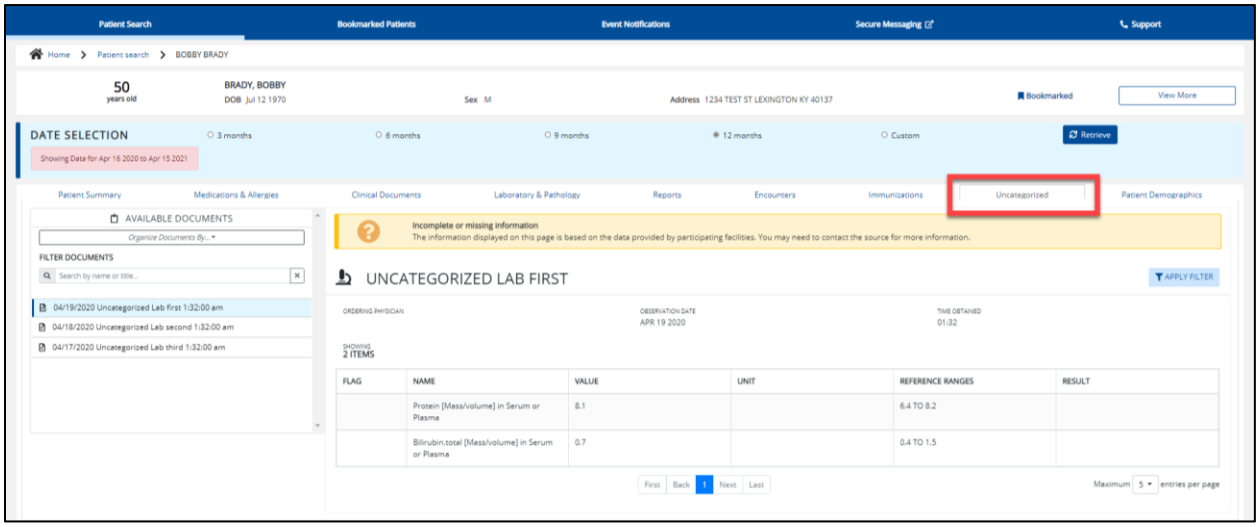
The **Immunizations tab** contains the patient's immunization history.

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

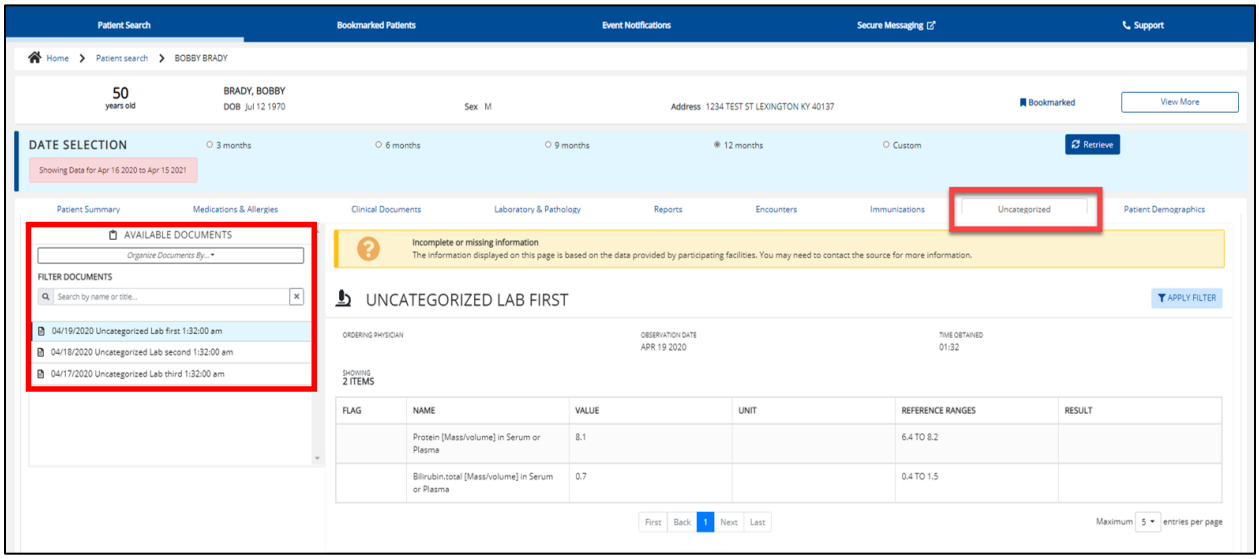


The **Uncategorized tab** stores the Laboratory, Radiology, Pathology, and Transcription documents that came to us named in a way that our system could not categorize them appropriately. These documents contain important health information and are made available to you to review here.

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

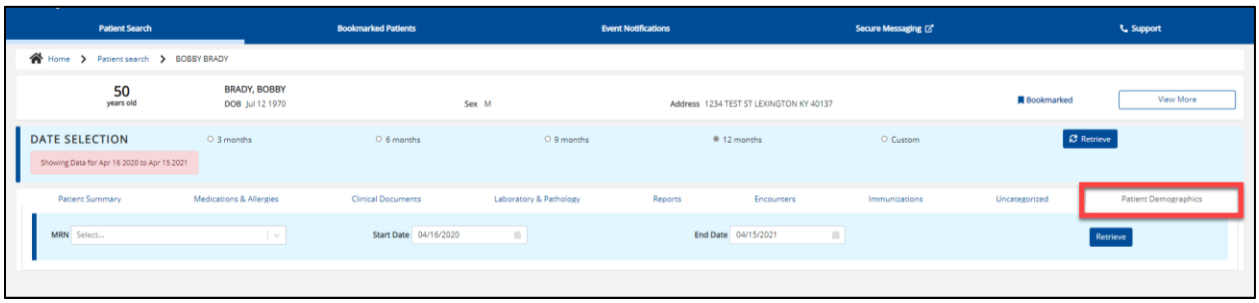


32. To review an Uncategorized report in its entirety, select a report from the **Available Documents** on the left side. The report will open on the right side.

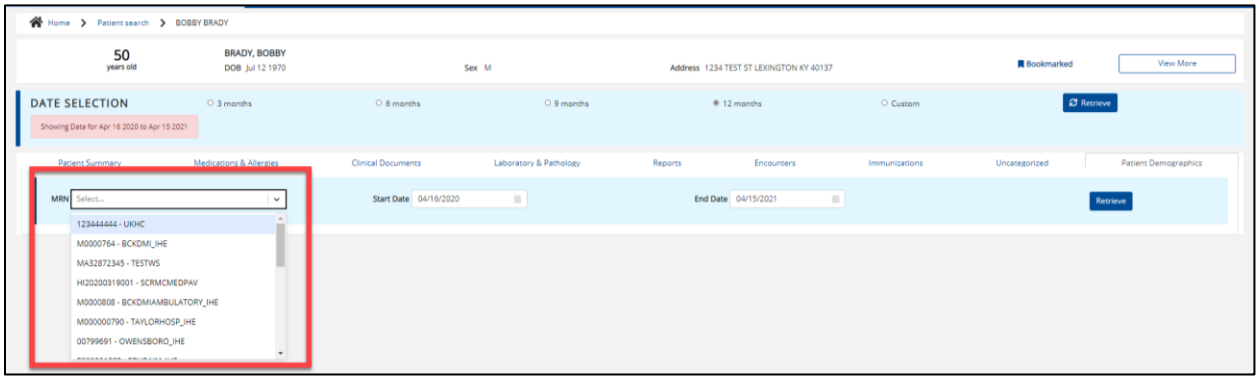


The **Patient Demographics tab** contains patient information such as next of kin, diagnosis information, insurance information, and, when available, will include the patient's extreme drug-resistant organism (XDRO) status. The default date selection is 12 months. You can enter a custom *Start* and *End*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

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

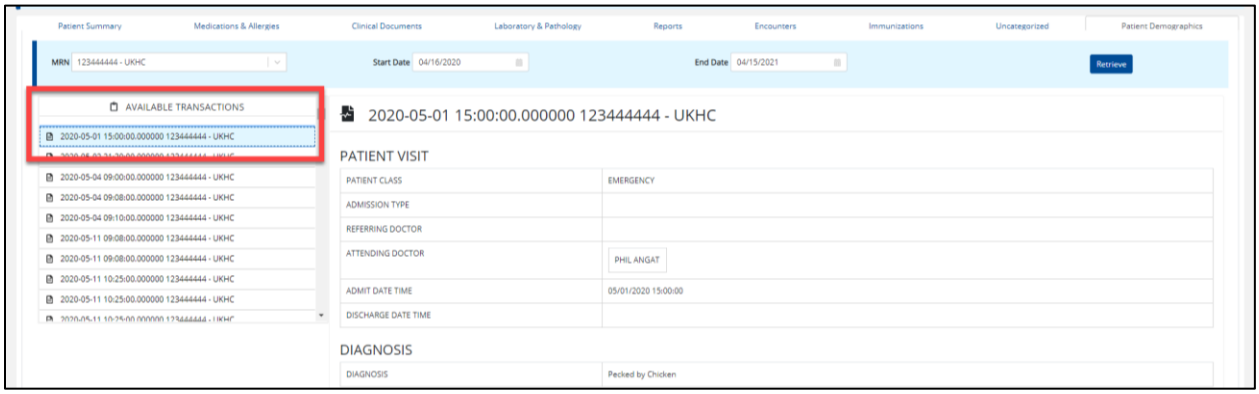


34. Select an **MRN** from the **MRN drop-down menu**.



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

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



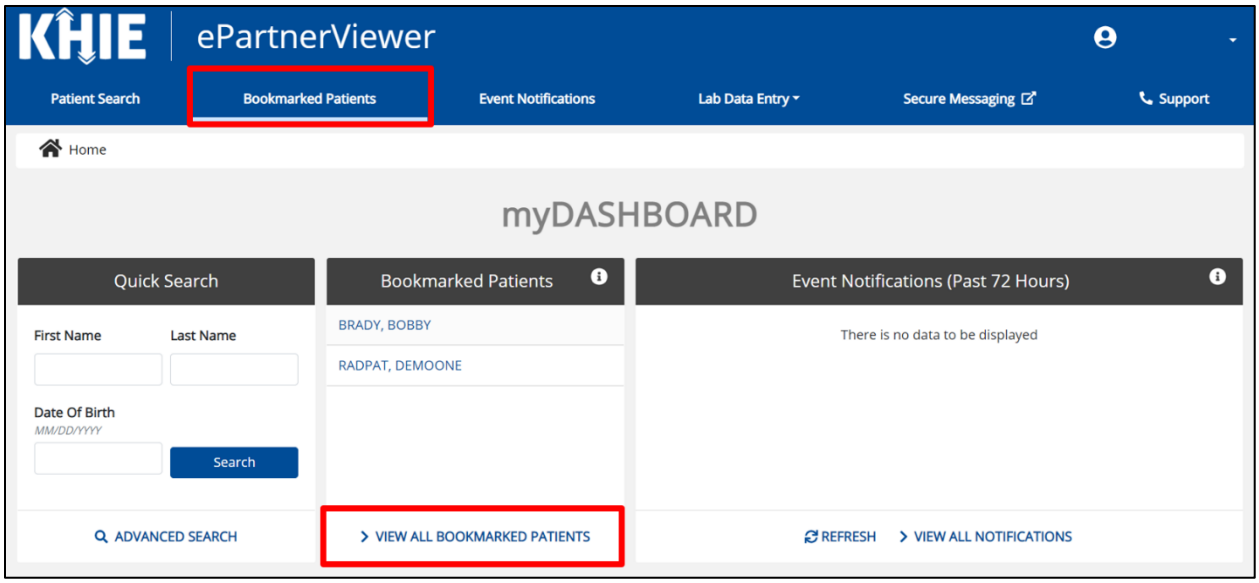
9 Bookmarking a Patient

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

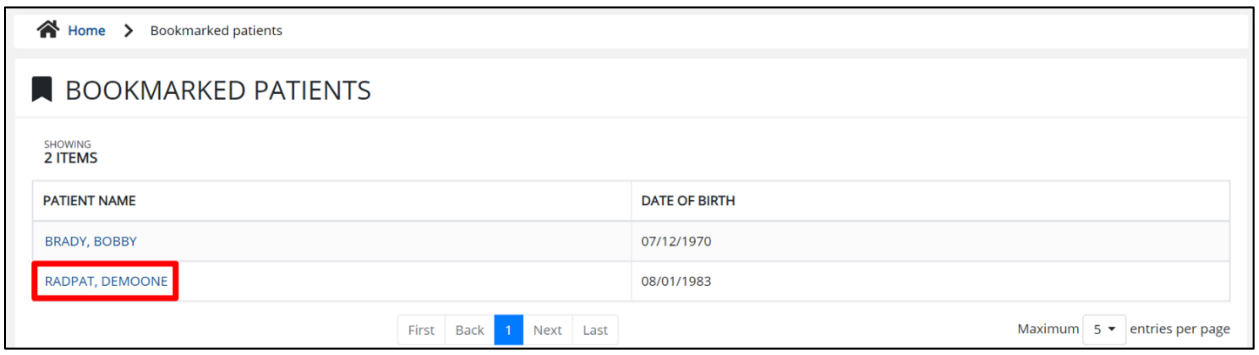
Users can access Bookmarked Patients from the *Navigation Bar* or from myDASHBOARD.

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.



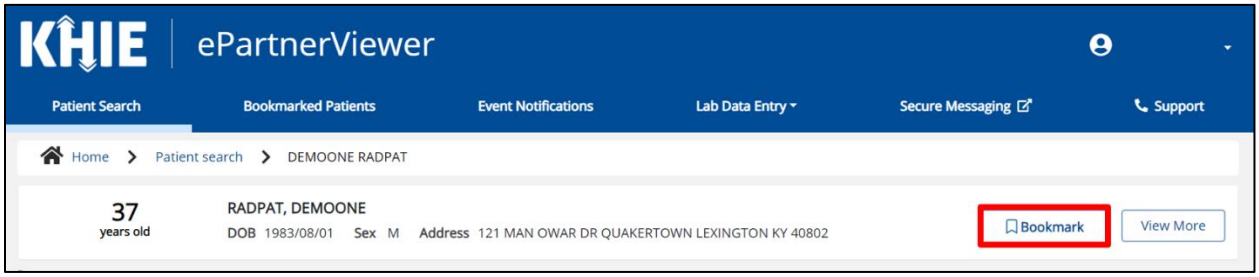
Please Note: From within the patient chart, Users can click Bookmarked Patients in the *Navigation Ribbon* to view the list of **Bookmarked Patients**.

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

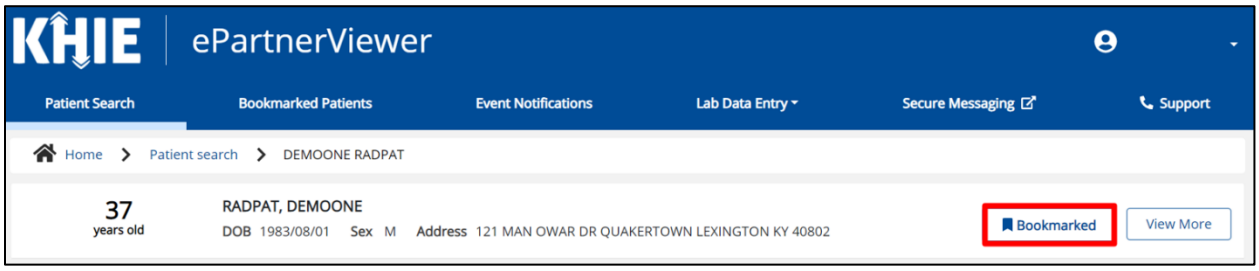


Adding Bookmarks

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

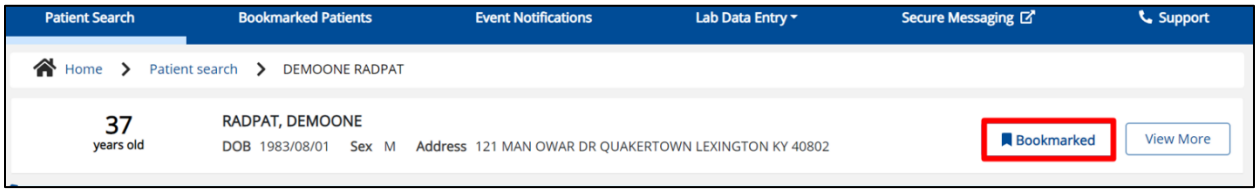


2. The **Bookmark Icon** changes from *light to dark* and displays the text *Bookmarked* to indicate the patient has been added to **Bookmarked Patients.**

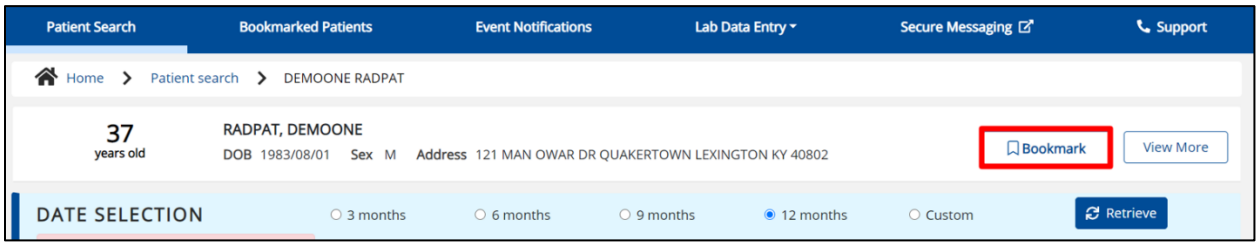


Removing Bookmarks

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

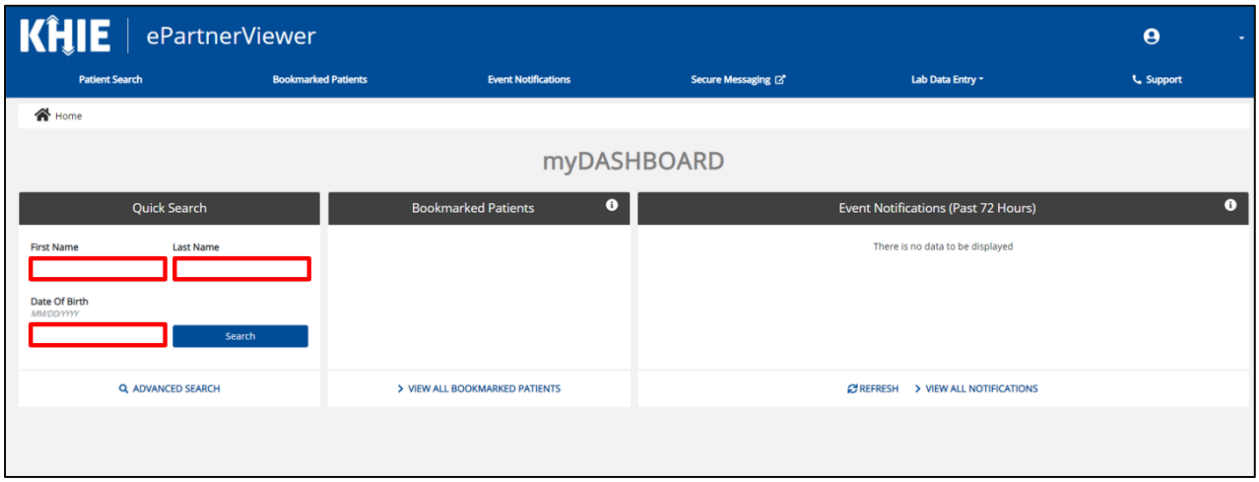
Users with one of the *Clinical User* roles are authorized to view low resolution images in the ePartnerViewer. Users with a *Clinical User* role and the *PACS Administrator* role can export images to their local Picture Archiving and Communications Systems (PACS) to view in high resolution.

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**.

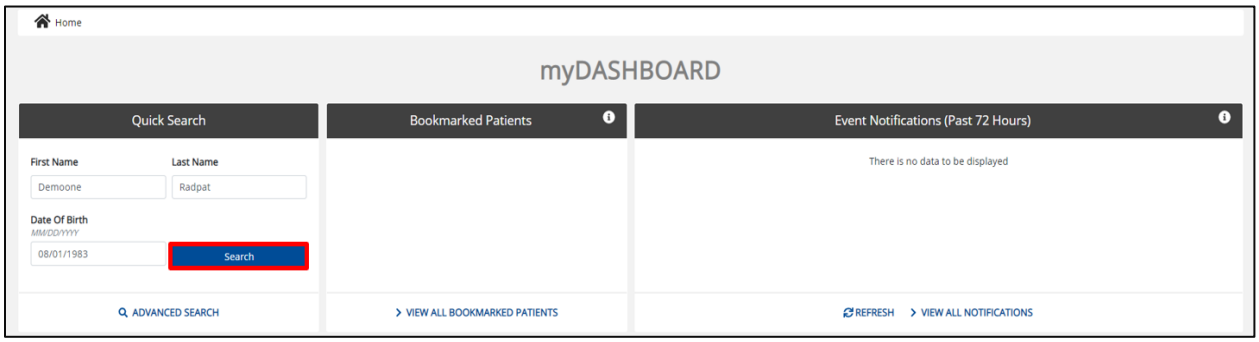


Please Note: Users should enter the patient's **Date of Birth** to narrow down the patient match results in the event there are multiple patients with the same first and last names.

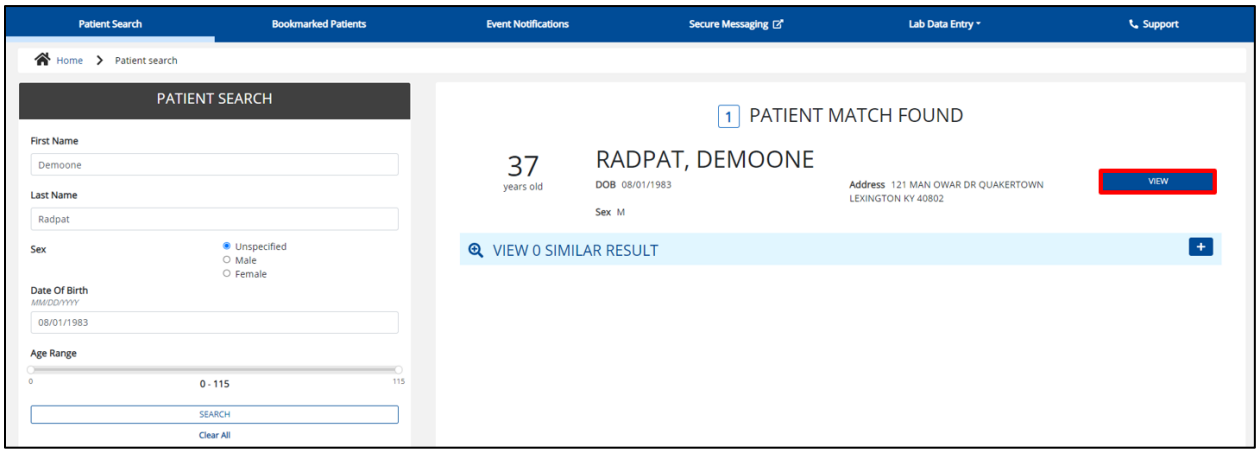
When the patient's Date of Birth is unknown, Users can click on **Advanced Search** to provide the patient's **Age Range**.

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

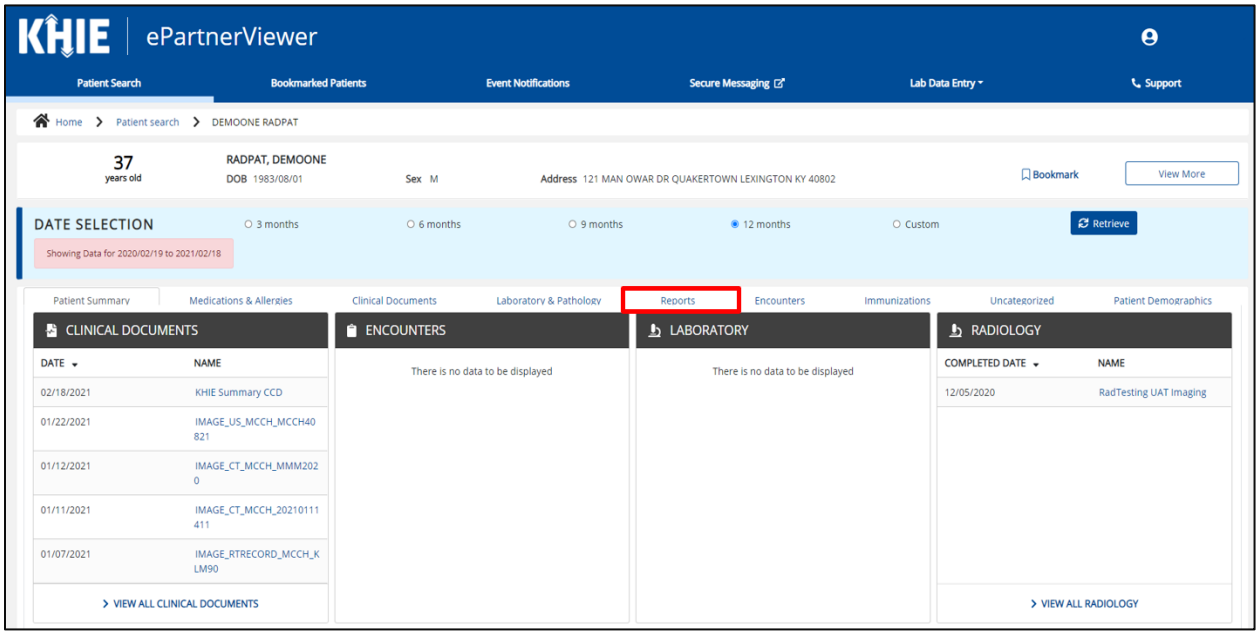
2. Click **Search**.



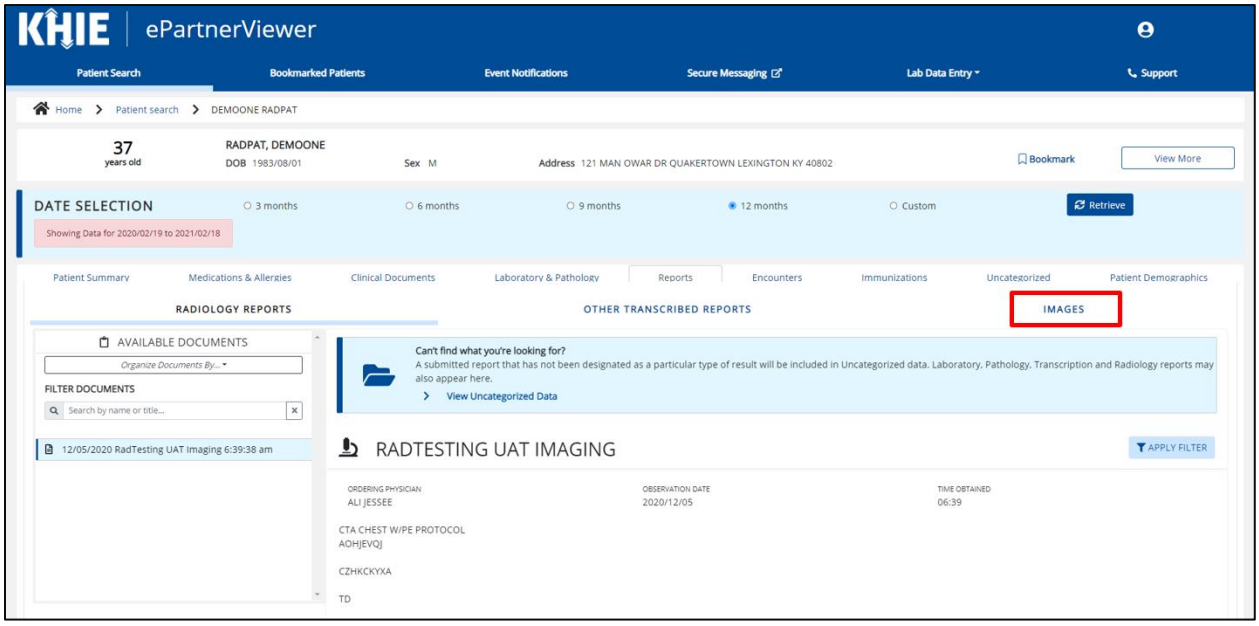
3. The Patient Search results display. Select the appropriate **Patient Match**.
4. Click **View** to open the patient chart. It will open in the Patient Summary.



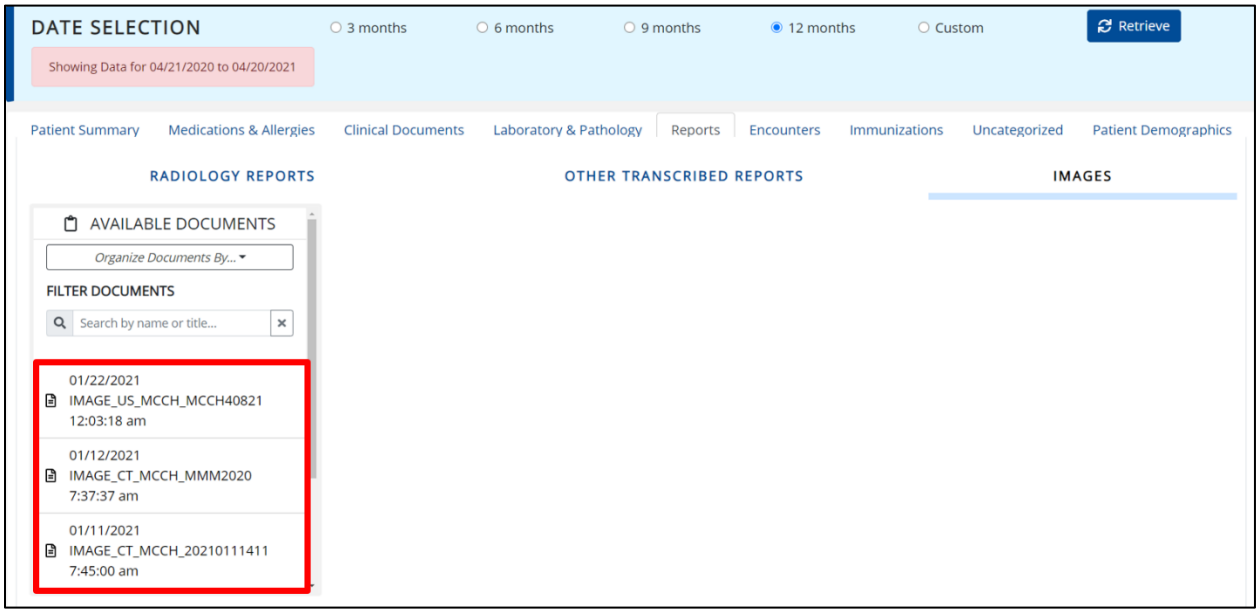
5. To view images, click the **Reports** tab.



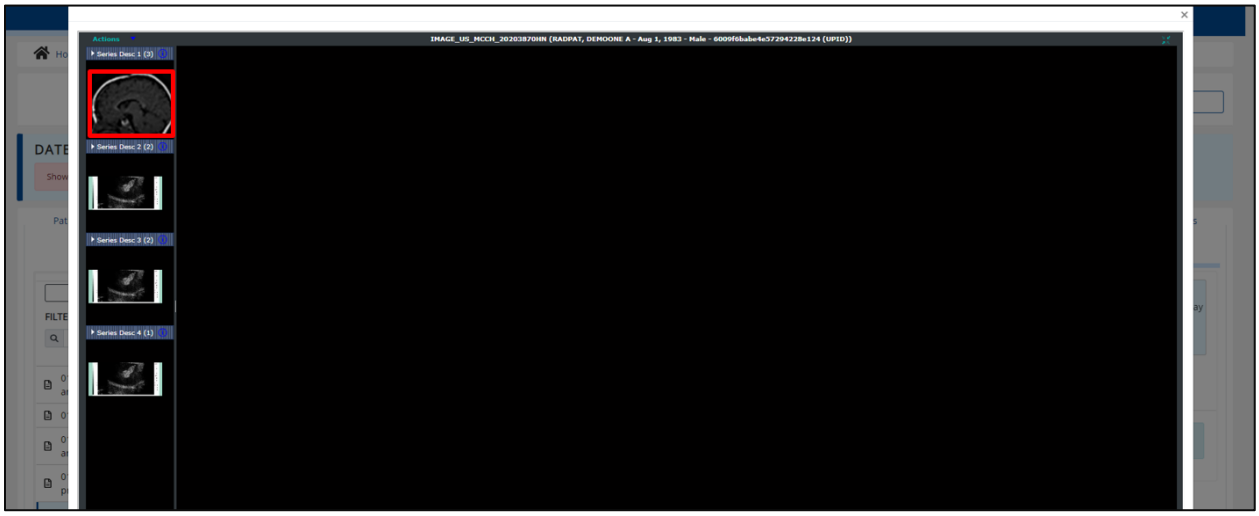
6. Click the **Images** tab.



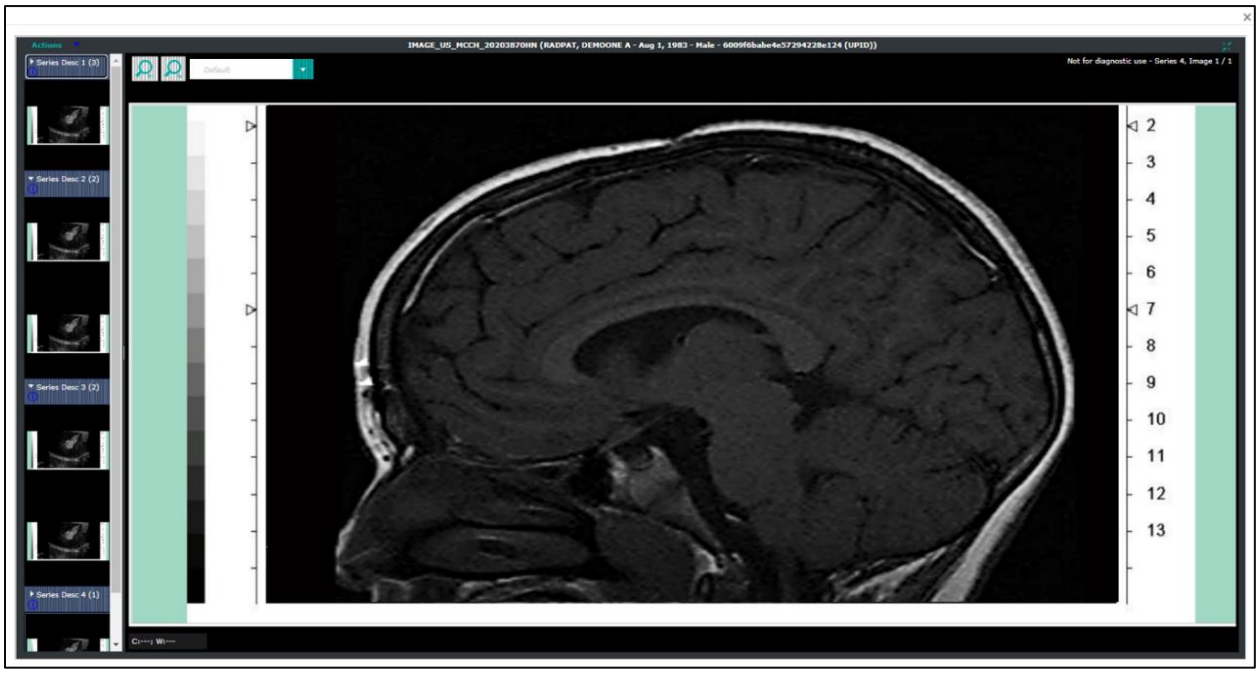
7. To view an image preview, select the **desired image report** from the list of *Available Documents* located on the left side.



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



9. A larger version of the image displays.



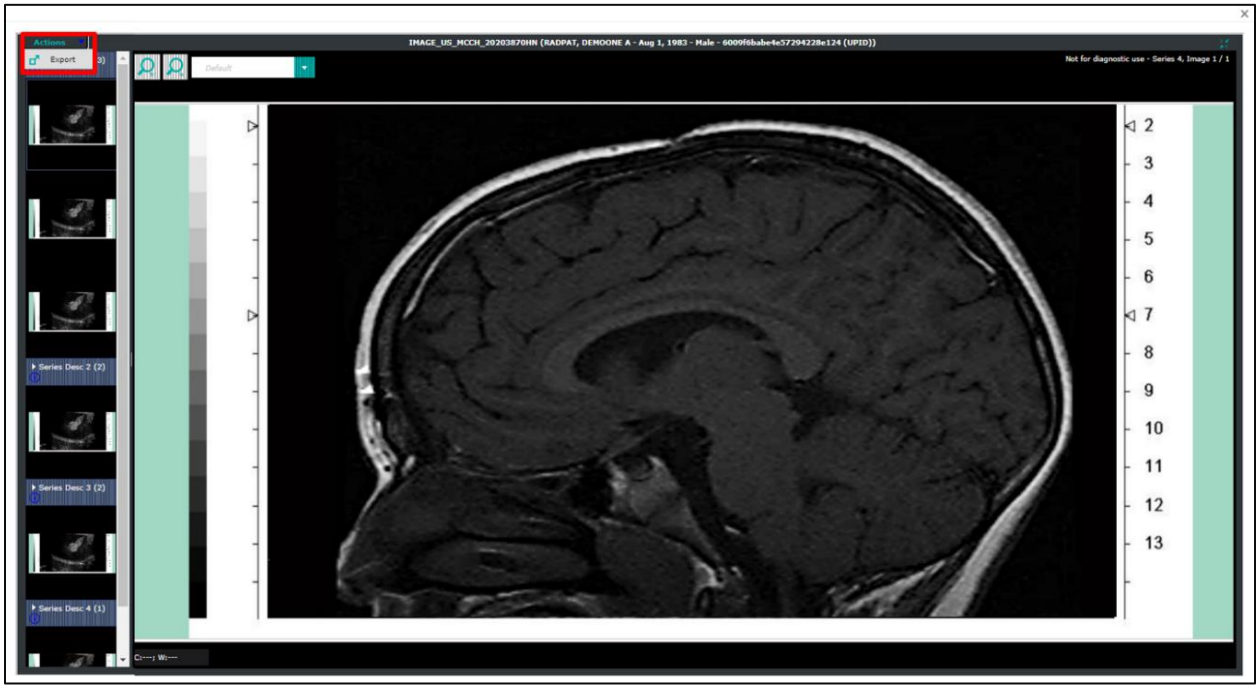
Please Note: The images viewed in the ePartnerViewer are low resolution images and are not intended for diagnostic purposes. To view high resolution images, Users with the *PACS Administrator* role must export images to their local Picture Archiving and Communications Systems (PACS). Users must have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

Exporting Images

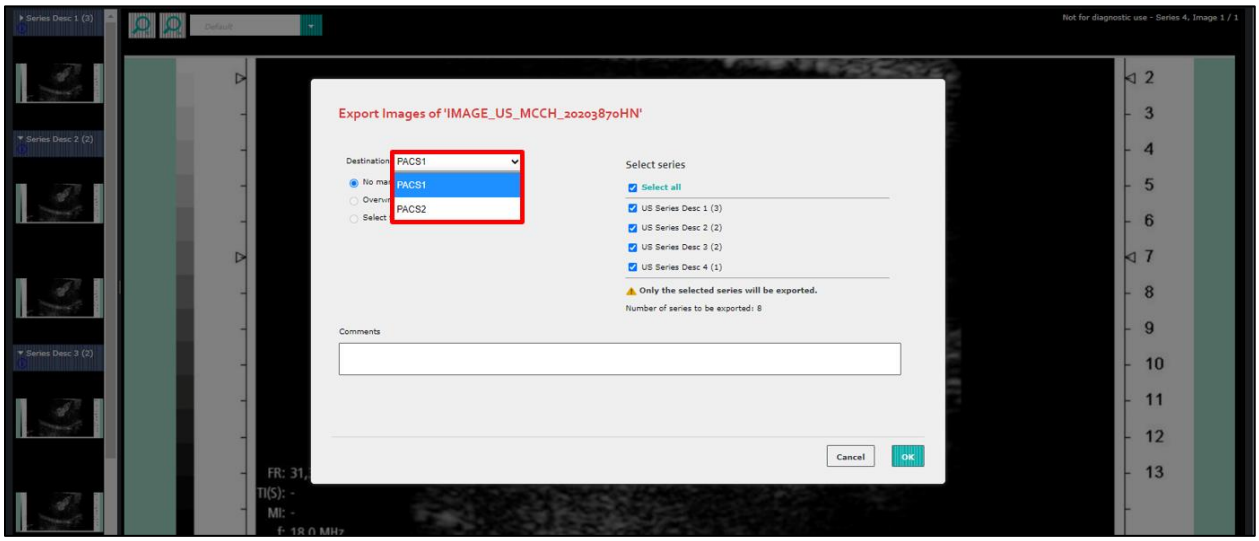
To view high-resolution images, Users must export images to their local Picture Archiving and Communications Systems (PACS) using DICOM or XCA-i. Only authorized Clinical Users with the *PACS Administrator* role have the option to export the image to a local PACS system.

1. To export a desired image to your local PACS system, complete steps 1 through 9 above and 1 through 8 below.

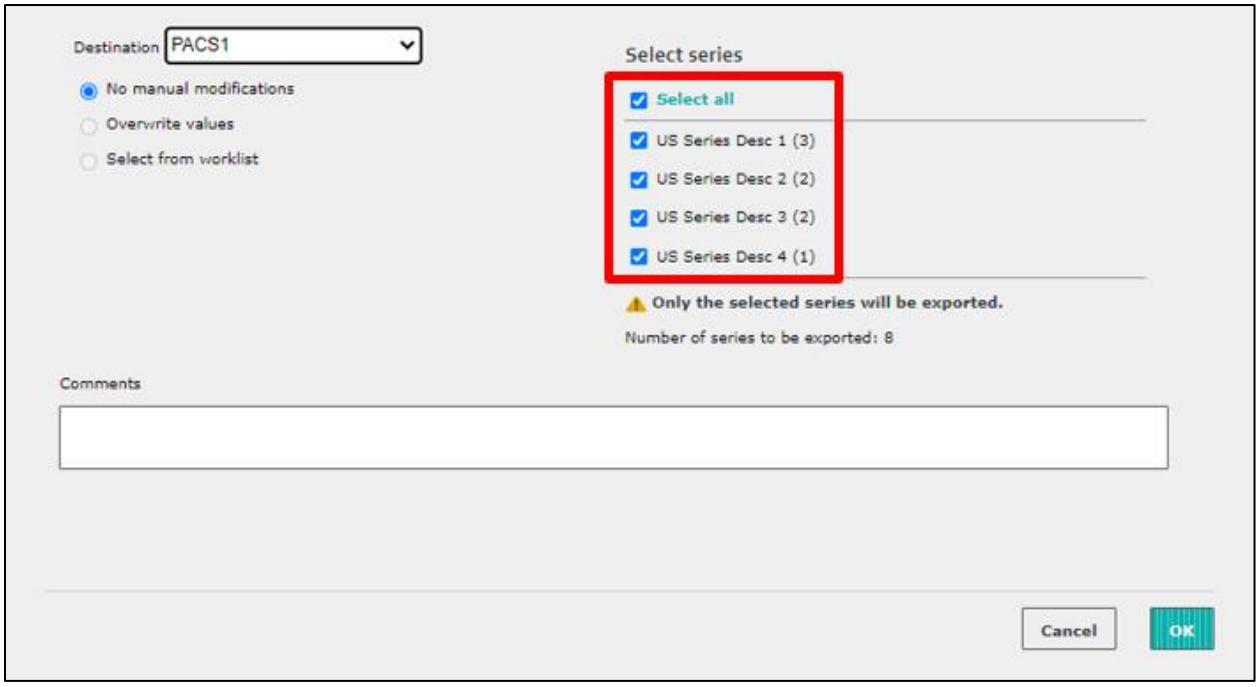
2. Click **Actions**. Under the **Actions** drop-down, click **Export**.



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

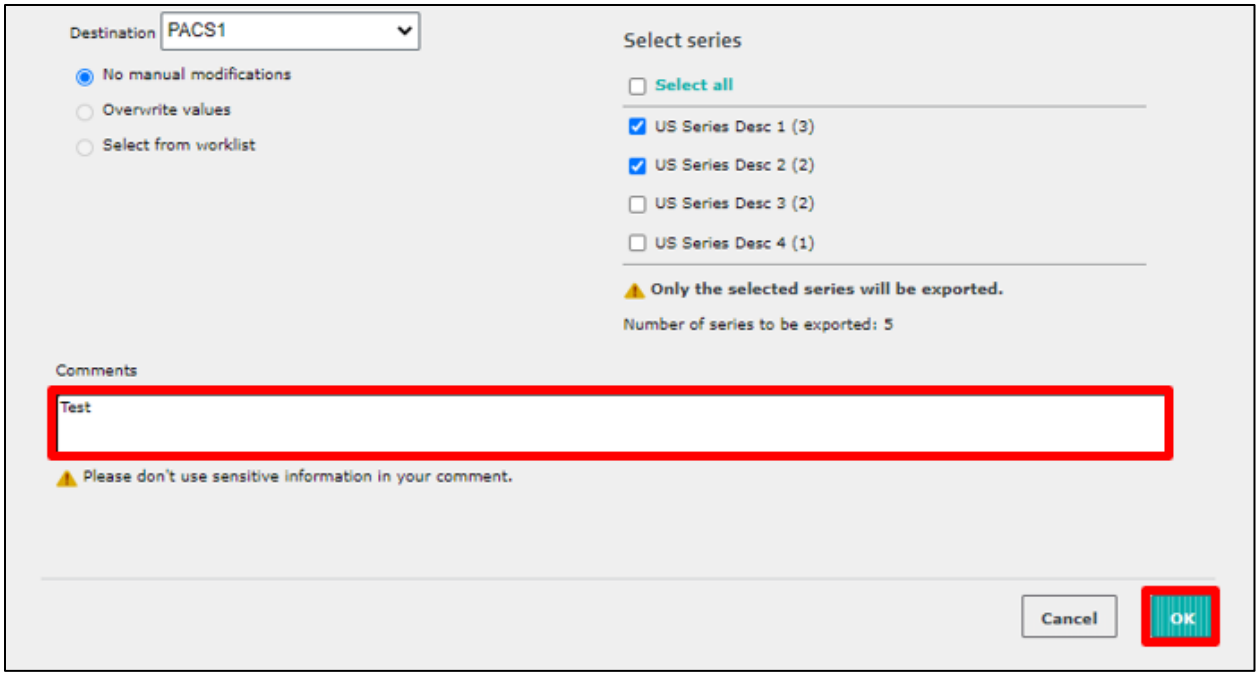


4. Select the **appropriate series** for exporting the image.

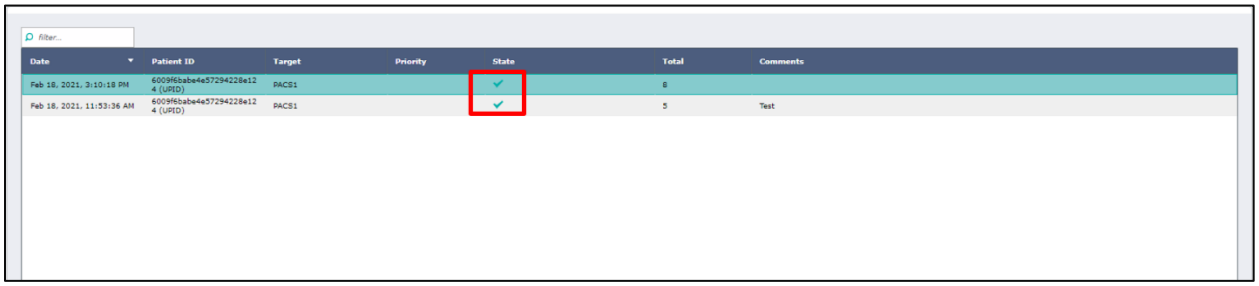


Please Note: By default, all series are selected. Users must de-select the **Select All** button, then select the appropriate series to export the image from a specific series.

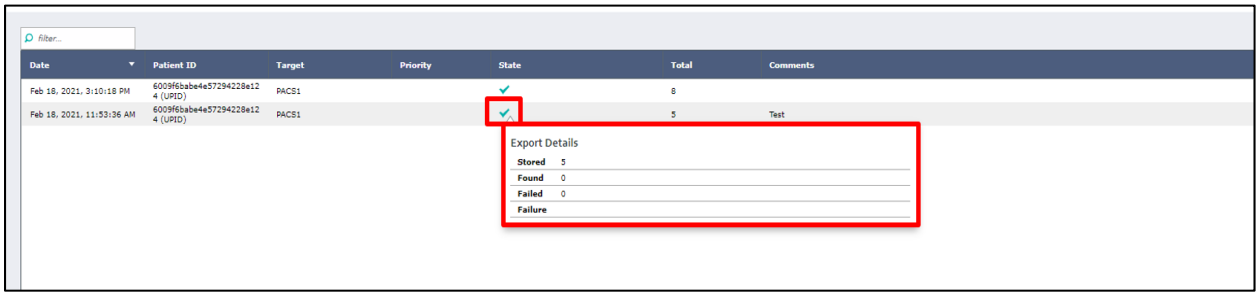
5. If desired, enter **additional details** about the image in the *Comments* field.
6. Once complete, click **OK**.



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



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



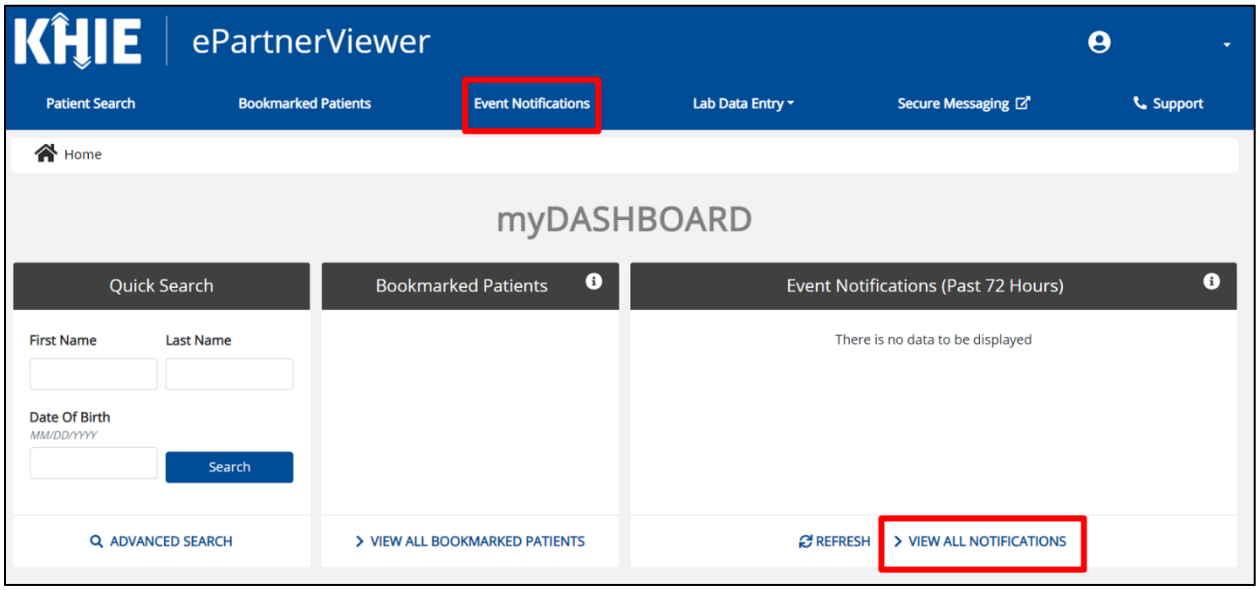
11 Reviewing and Managing Event Notifications

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.

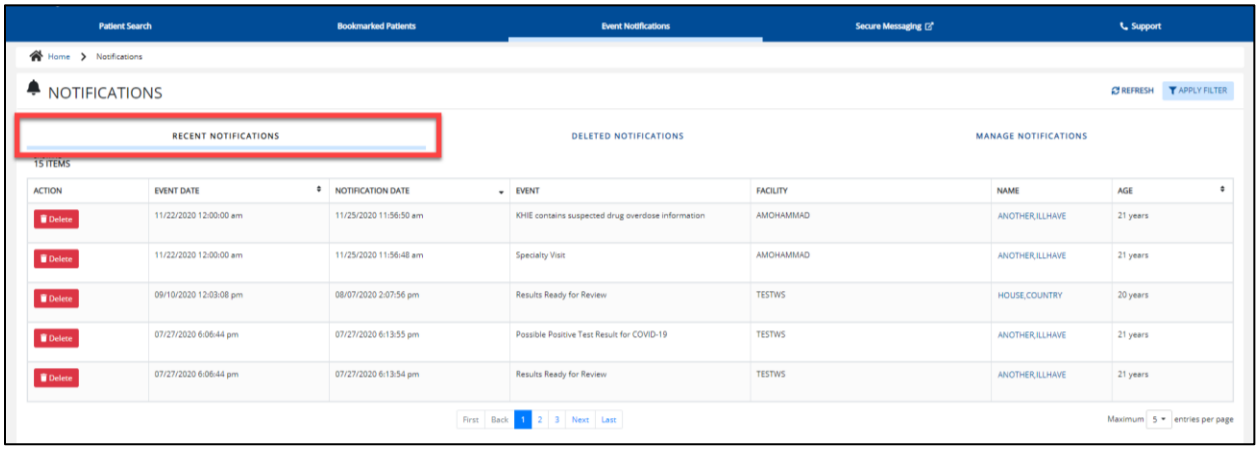
Reviewing Event Notifications

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

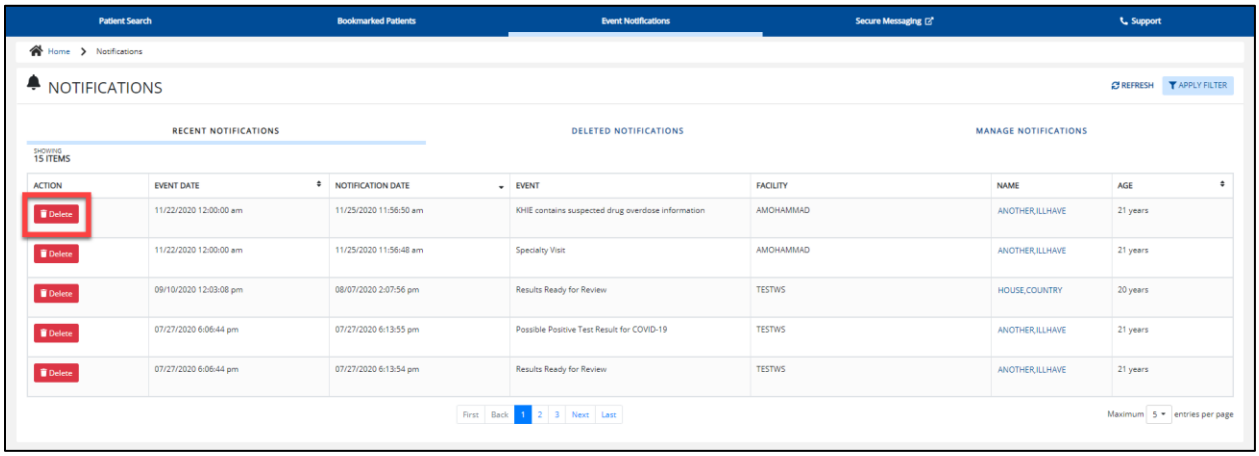
1. To view Event Notifications, click **View All Event Notifications** from *myDASHBOARD* or click on the **Event Notifications** tab in the *Navigation Bar*.



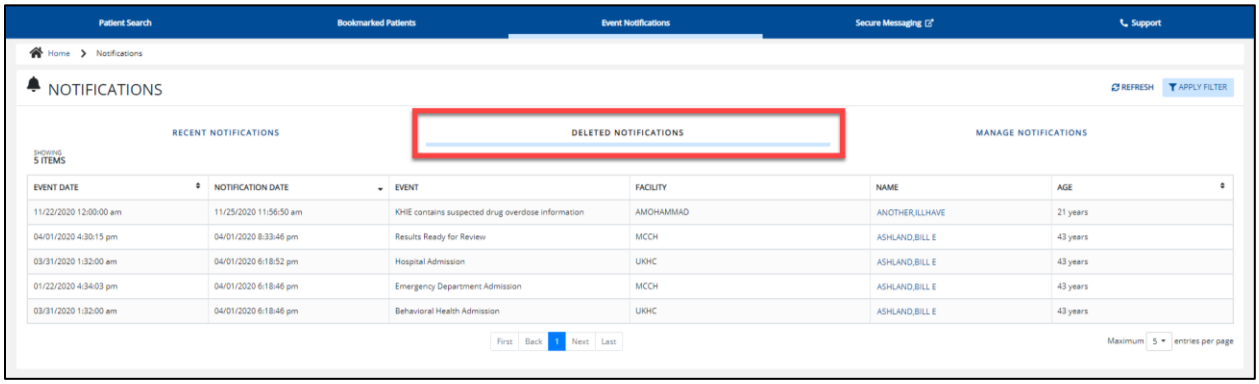
2. Click **Recent Notifications** to review a list of recent event notifications.



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



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

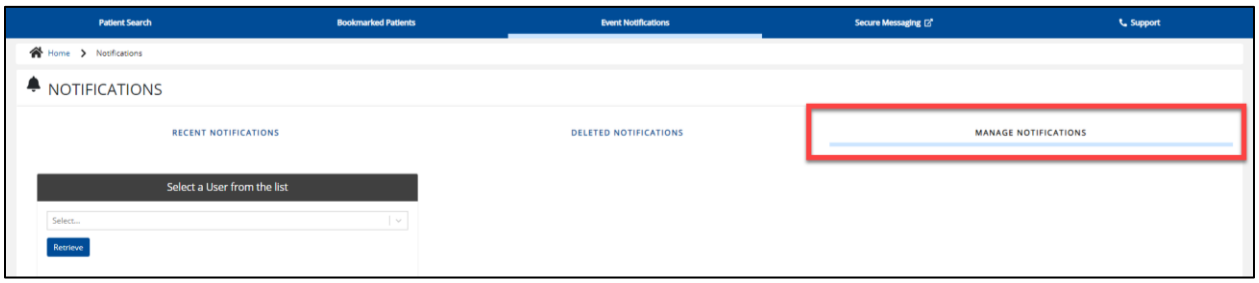


Managing Event Notifications

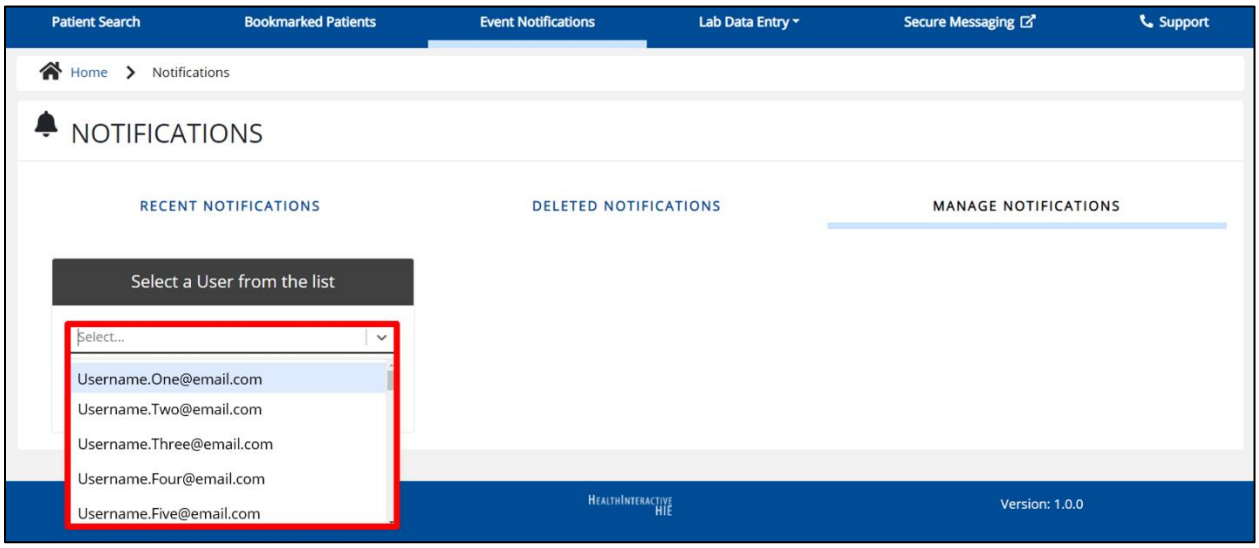
Users with a *Clinical* role can manage their own event notifications. They can add and delete patients and edit the types of event notifications they want to receive on their patients.

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

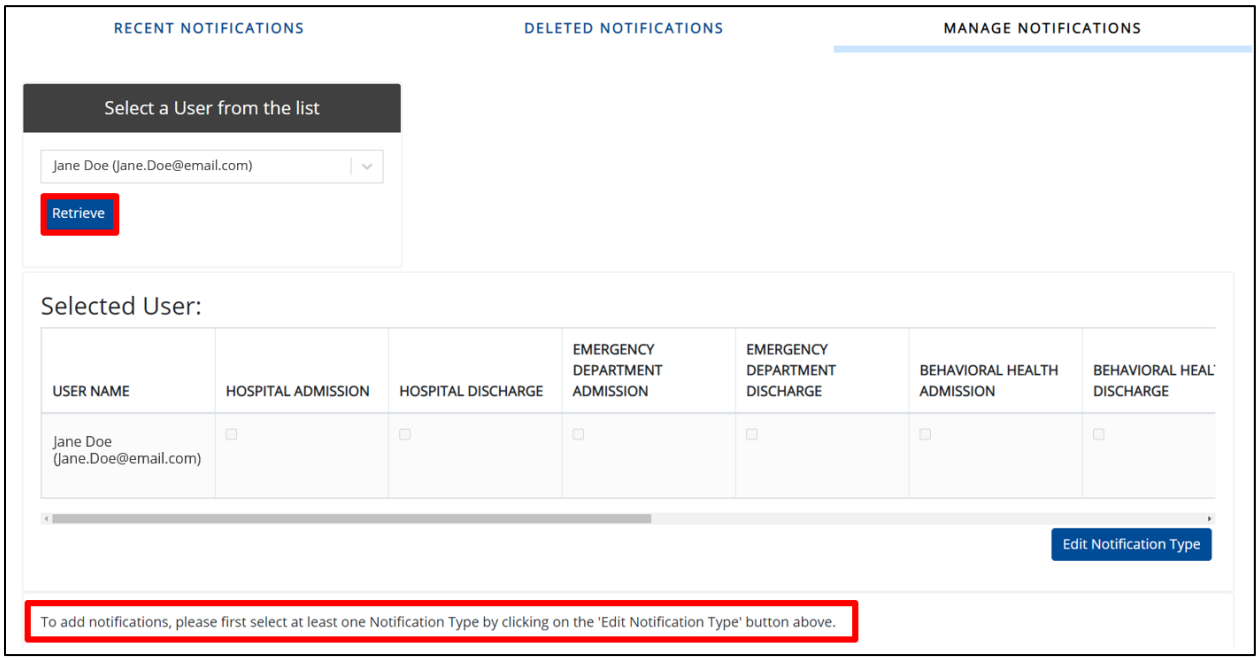
1. Click **Manage Notifications** to add and delete patients and edit the types of event notifications received.



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

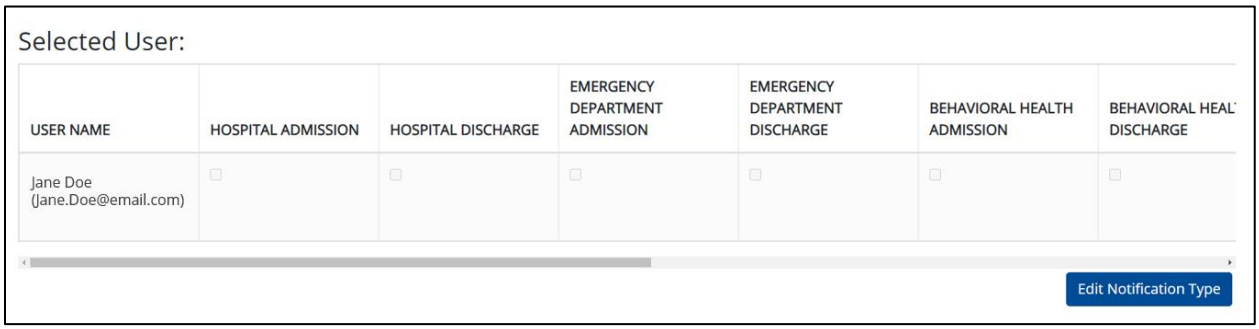


3. Click **Retrieve** to display the *Selected User* and *Selected Patients*.

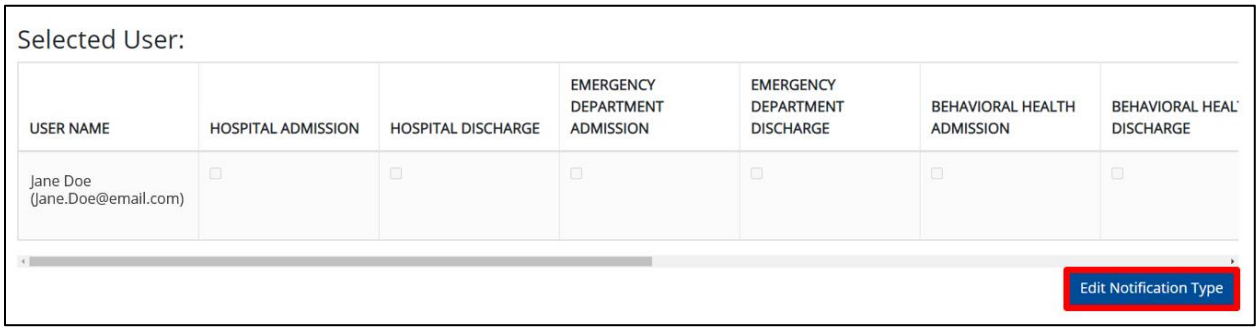


Please Note: If the User has <u>not</u> yet added any event notifications, only the *Selected User* section displays. Once the User clicks **Edit Notification Type** and adds <u>at least one</u> Notification Type, the **Add Patient** button is enabled and displays. Once the User adds patients, the *Selected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

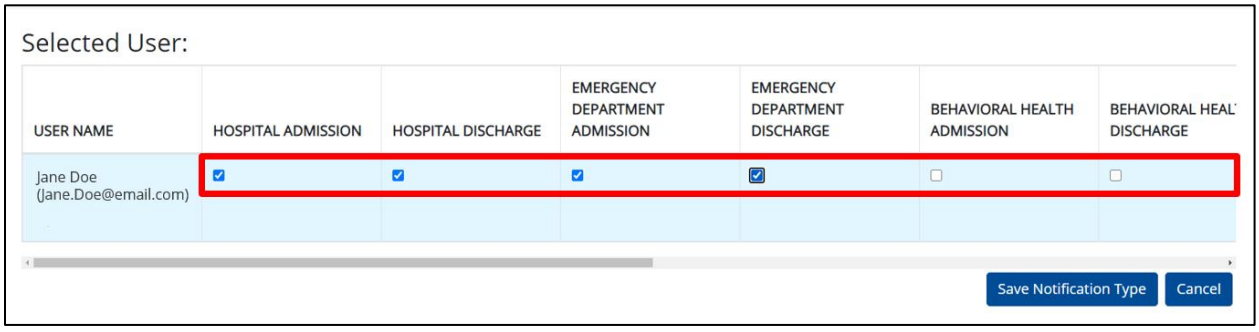
The *Selected User* section displays the event notification types that are enabled for a selected user. You can add or delete the notifications that a Selected User receives.



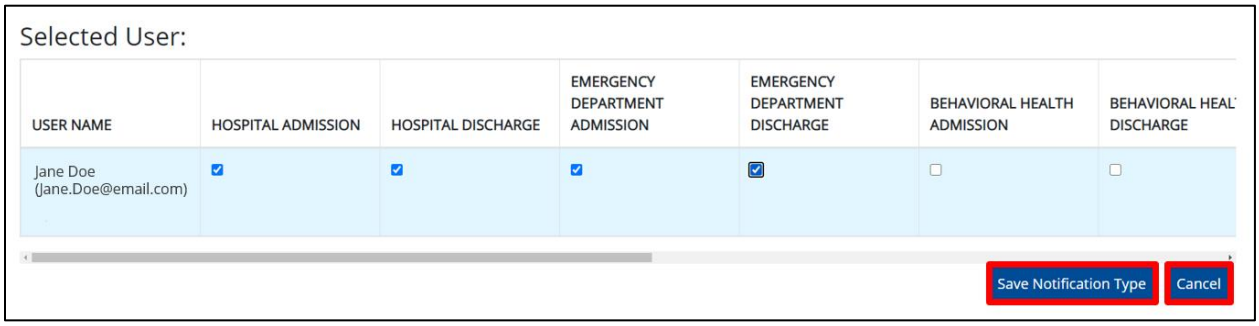
4. Click **Edit Notification Type** to activate the checkboxes.



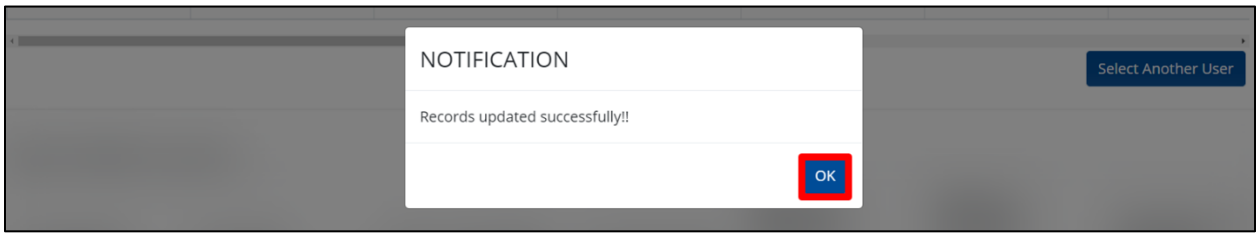
5. Click the **Checkboxes** to add or delete a notification.



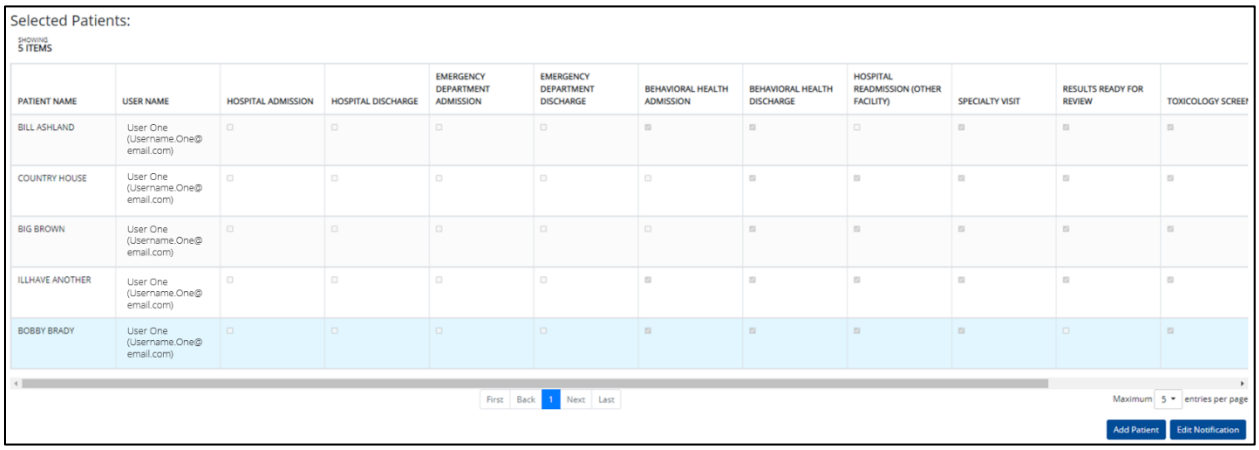
6. To save the changes, click **Save Notification Type**.
7. To discard the changes, click **Cancel**.



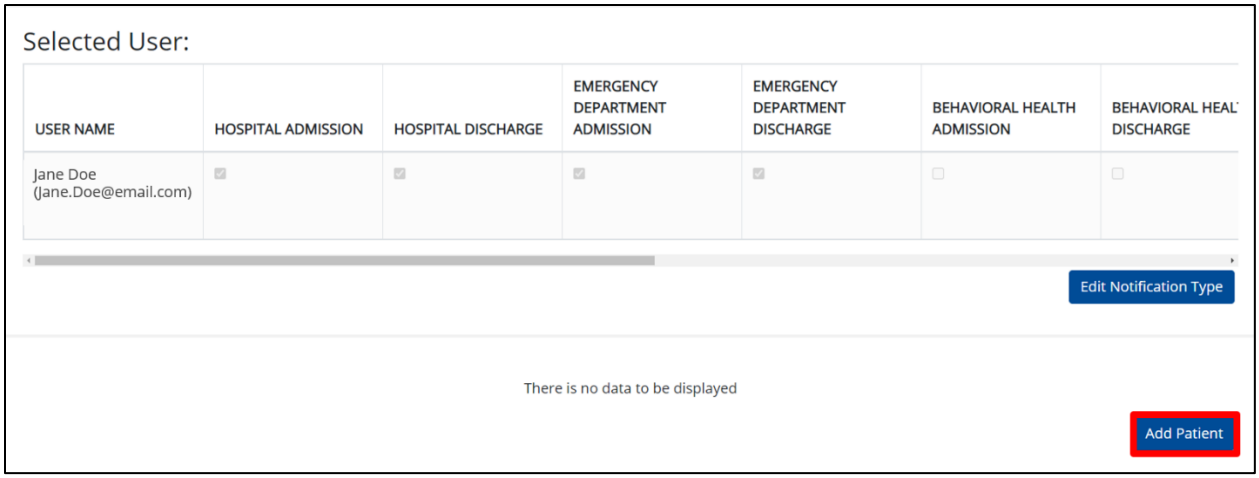
8. After saving the Notification Type, a **Pop-up** displays indicating the record has been successfully updated. Click **OK** to close the pop-up.



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.

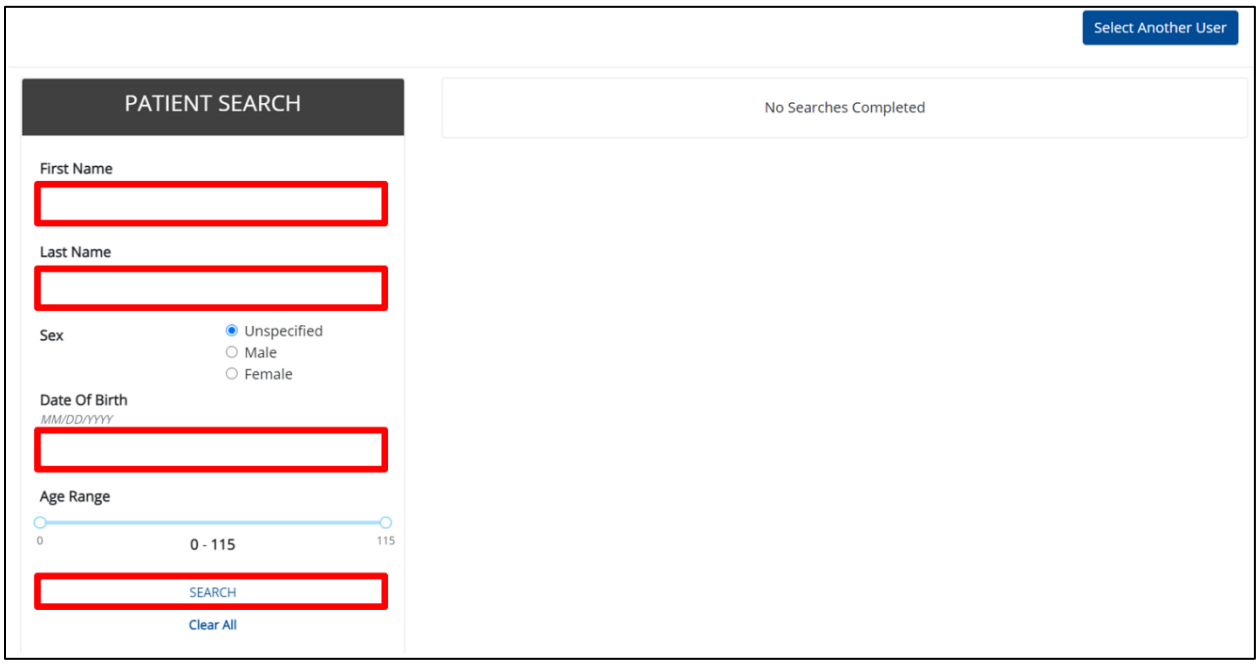


9. To add patients to the panel, click **Add Patient** to open the *Patient Search*.

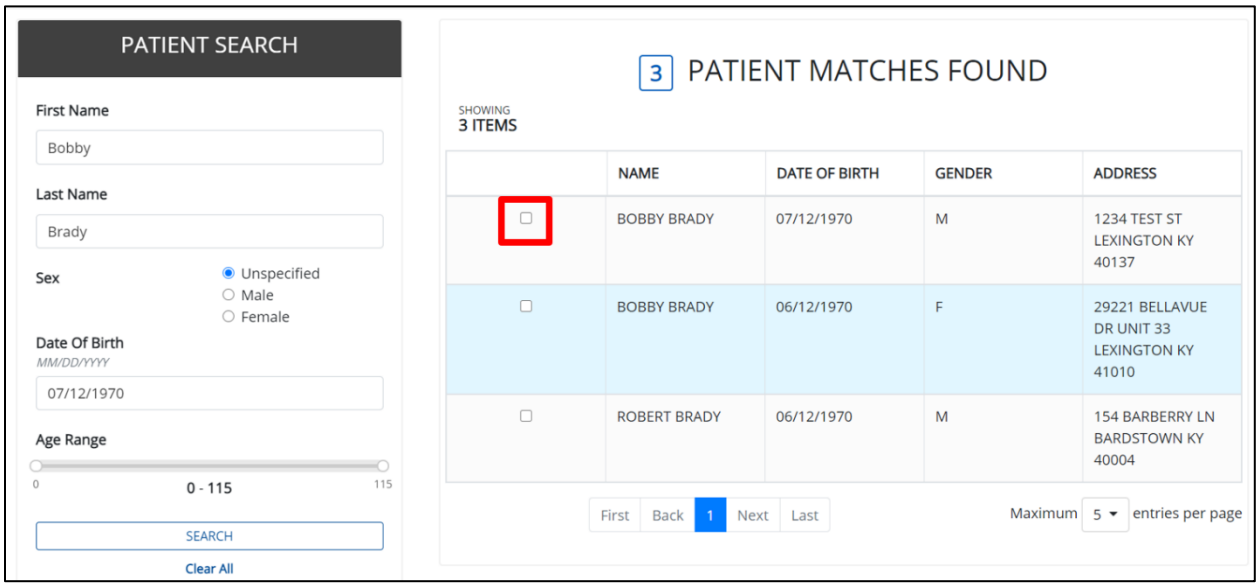


Please Note: If the User has <u>not</u> yet added any patients to receive event notifications, the *Selected Patients* section will not display. Once the User adds patients, the *Selected Patients* section is enabled and displays data.

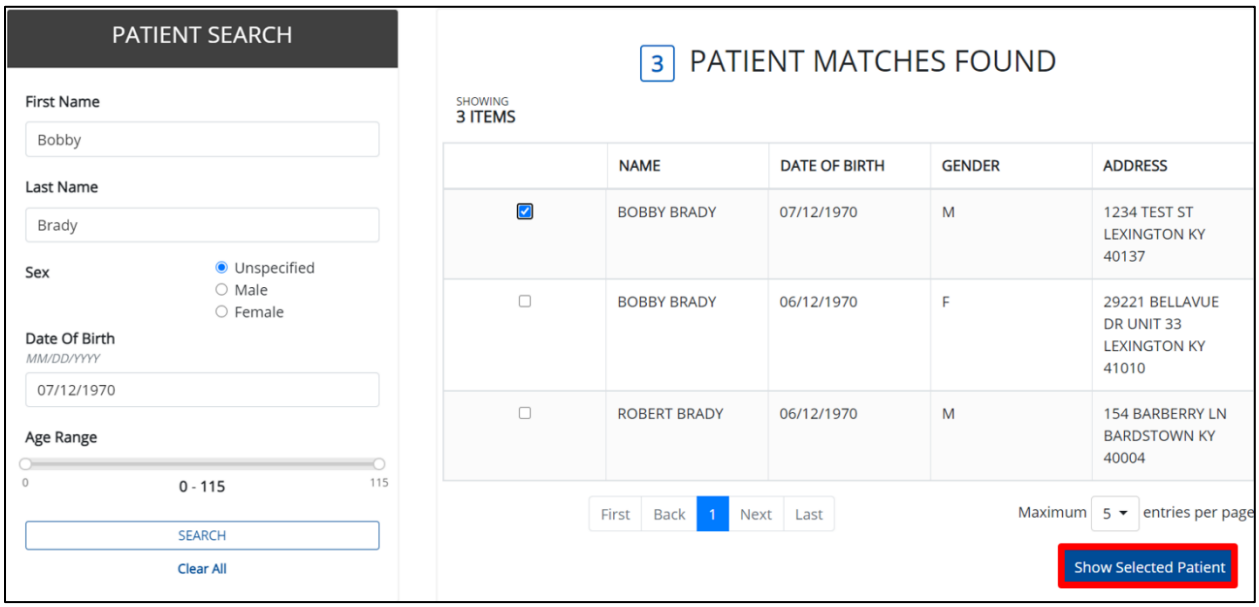
10. The *Patient Search* displays. Enter the patient's **First Name** and **Last Name**.
11. Enter the patient's **Date of Birth**.
12. When the Date of Birth is unknown, provide the patient's **Age Range**.
13. Enter the patient's **Sex**.
14. Click **Search**. The Patient Search Results display to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



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



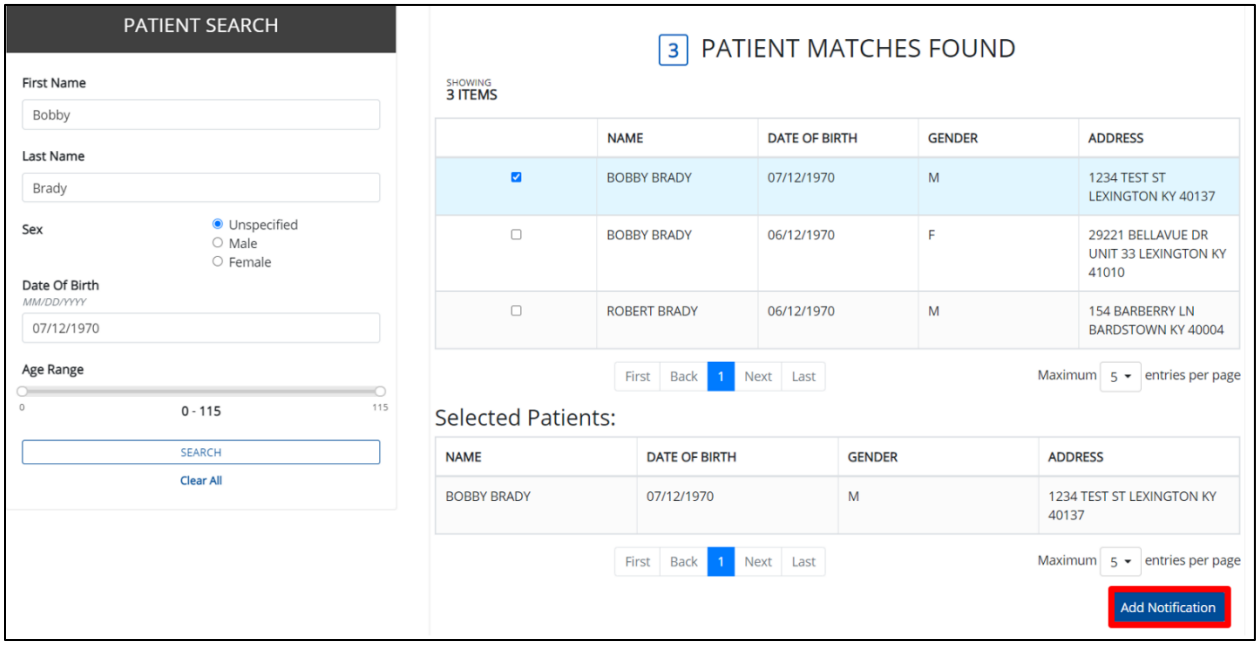
16. Click **Show Selected Patient** to display the patient's name.



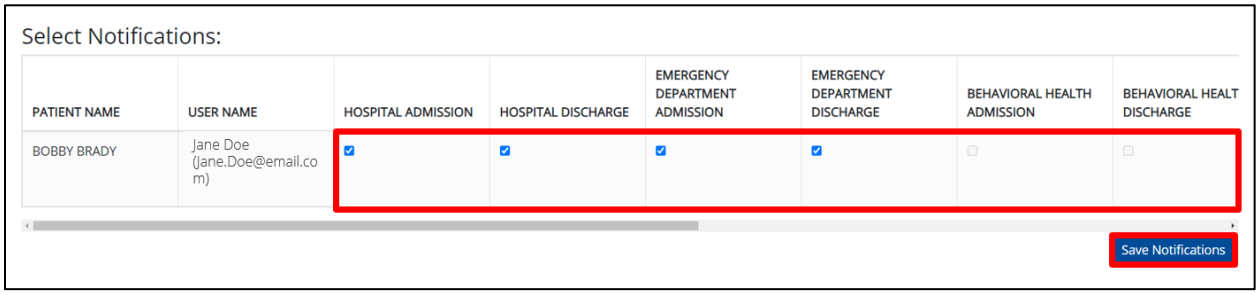
Please Note: To add multiple patients at the same time, do **not** click on **Add Notifications** until the final patient has been selected.

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.

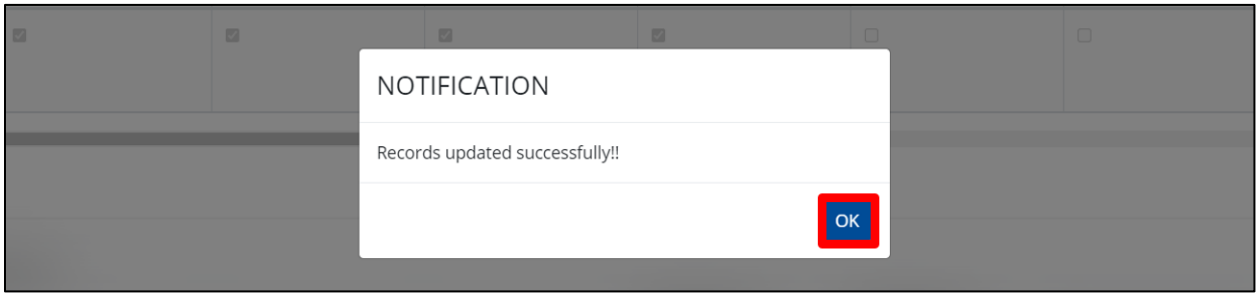
17. Click **Add Notifications** to select the notifications.



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.



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.

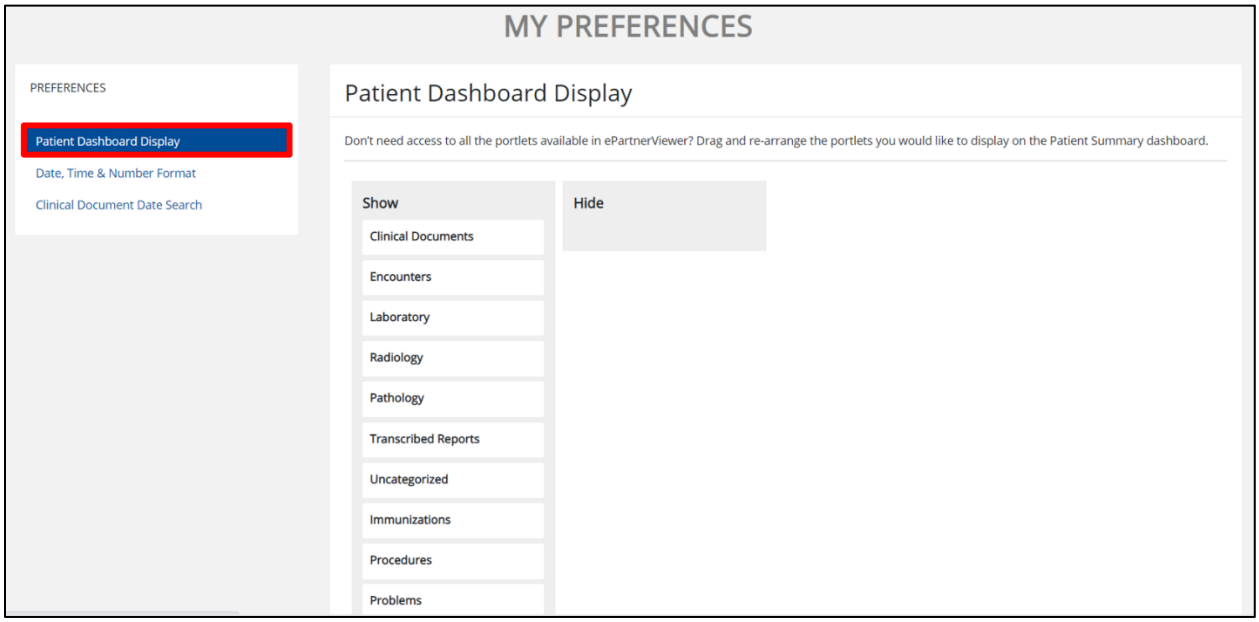
Apply Customized Preferences

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

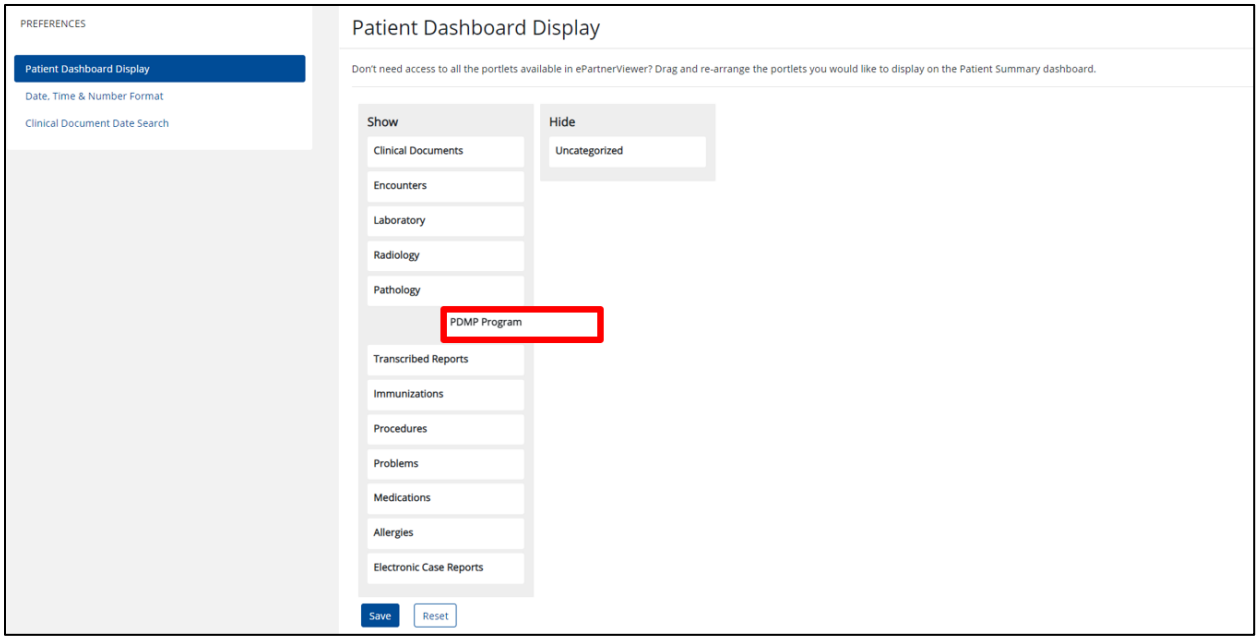
Patient Dashboard Display

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.

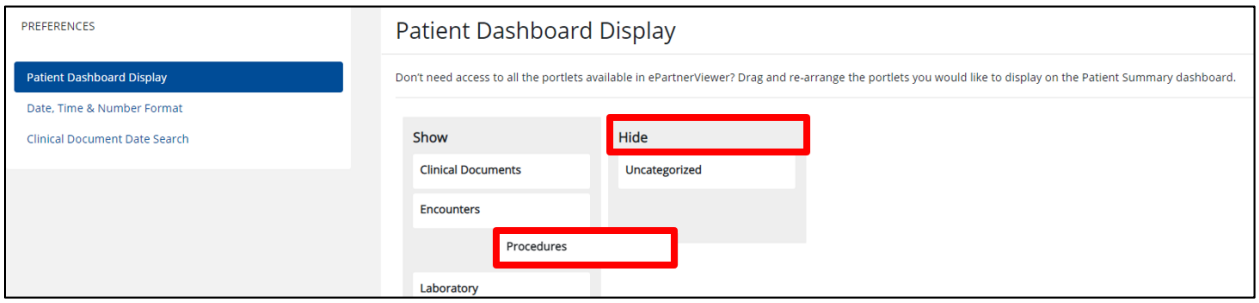
3. On the **Preferences** page, click **Patient Dashboard Display**.



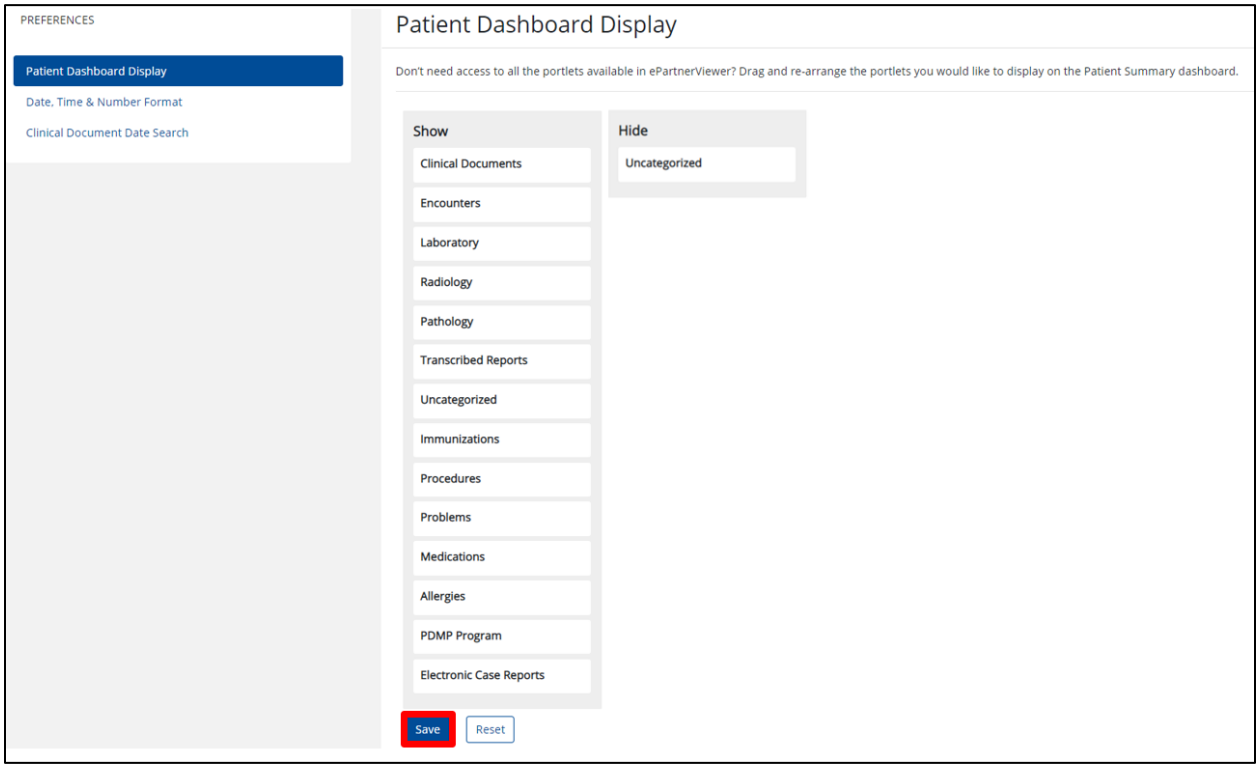
4. To customize the order in which the Portlets appear, drag the Portlets up and down to arrange them in the desired order.



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



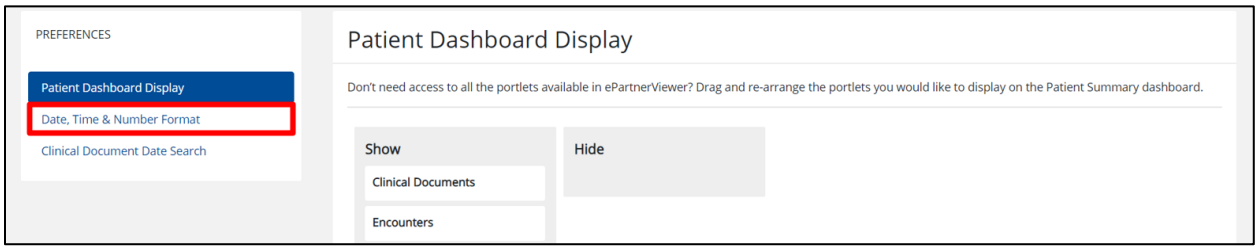
6. Click **Save** to apply changes.



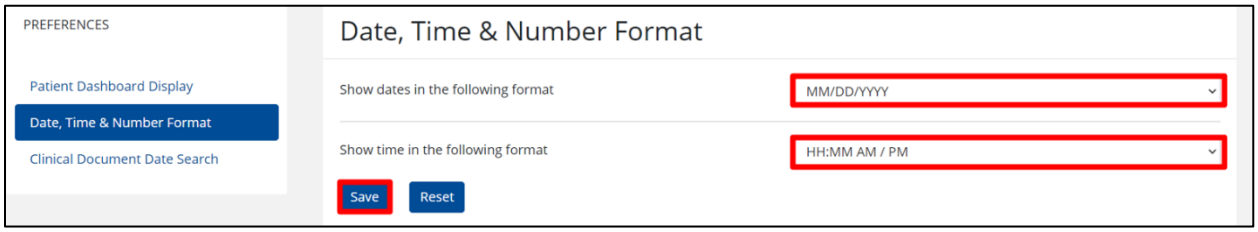
Date, Time, and Number Format

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**.



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

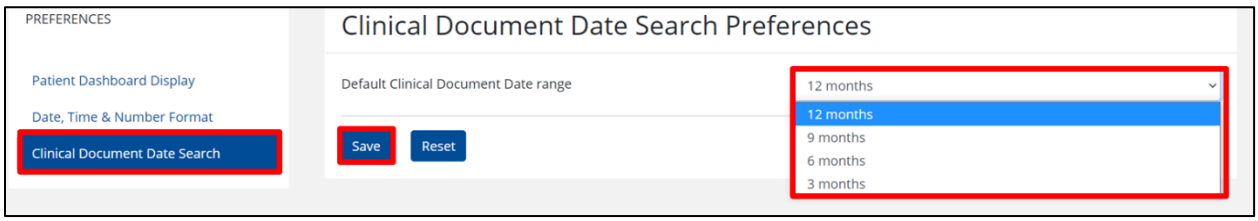


Clinical Document Date Search

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.

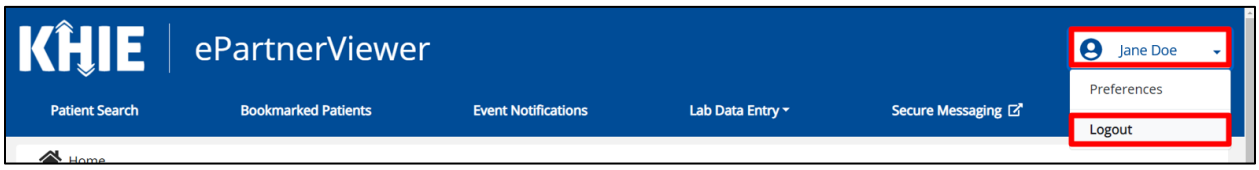
1. On the **Preferences** page, click **Clinical Document Date Search**.
2. You can select either of the following settings as your default:
   - Select **3 months** to see the latest 3 months of patient data.
   - Select **6 months** to see the latest 6 months of patient data.
   - Select **9 months**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



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.