



Health Information Exchange Enterprise Access User Help Guide

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1 HIE – Enterprise Access Introduction

The MobileMD HIE (Health Information Exchange) Enterprise Access solution includes the following major features:

1. **Results Inbox** –Receives real time patient documents routed to the practice. Items can include lab results, radiology reports, transcribed documents, cardiology reports, pathology reports, face sheets and emergency department alert messages. Users can print, filter, assign, make notes, view and remove items from their inbox.
2. **Patient Archive Search**– Provides authorized users to the ability to search for information previously routed to the facilities inbox, by patient, result type, or other attributes of the result.
3. **Global Search** – Provided authorized users the ability to search the global repository for patient medical records at other connected hospitals, practices, etc.
4. **eShare (optional)** – Provides users the ability to communicate with and forward clinical documents to other practices and hospital groups. Includes a referral form for referring patients to other practices.
5. **Outpatient Orders (optional)** – Provides users the ability to create outpatient orders (e.g. Radiology, Rehabilitation, Laboratory) to be sent to participating hospitals.
6. **Patient Charting (optional)** – Provides users with the ability to capture patient data, such as vital signs, patient family history, procedures, demographics, health insurance information, prescribe prescriptions, create orders, and send the captured data to the HIE to be stored in the patients document tree.
7. **Document Delivery (optional)** – Provides users the ability to route documents from a practice to a hospital department in support of patient event-centric workflows (e.g. Surgical Scheduling, Labor and Delivery, etc.). To be replaced by eShare.
8. **Mobile Application (optional)** – Provides users the ability to view patient results, documents and visits from a connected mobile device.
9. **Tablet Application (optional)** – Provides the users the ability to view patient results, orders, documents, and visits from a tablet device.
10. **Patient Access (optional)** – Provides patients access to personal medical records, results, ability to request appointments, and request prescription refills.
11. **Audit Reports (optional)** – Allows authorized users to run reports on activity on a particular patient or a particular user within their practice.
12. **Downtime Access (optional)** – Allows hospital users to search and view patients when there is a system outage or update that may not allow normal access into the HIE Portal.
13. **Change Password** – Provides users with the ability to change their passwords. Note: passwords have automated expiration periods and users are alerted when a password change is required.
14. **Forgot Password** – Provides users with the ability to reset their password. The password self-help feature requires a user to answer three security questions before resetting their password.

2 Support

MobileMD maintains an operations support desk for technical support and for responding to issues


regarding the HIE. MobileMD offers email support and phone support.

2.1 Email Support

MobileMD offers email support for email questions and/or issue descriptions. This email address is monitored by the MobileMD Data Center support staff Monday through Friday, from 8:00 AM to 9:00 PM EST.

MobileMD telephone support	(877) 210-3491
Market Areas - Hospitals / Facilities	Support Email Address
Sacramento <ul style="list-style-type: none"> ▪ Mercy Hospital of Folsom ▪ Mercy General Hospital ▪ Mercy San Juan Medical Center ▪ Methodist Hospital of Sacramento ▪ Woodland Healthcare ▪ Mercy Imaging Centers 	sacramento-support@mobilemd.com
Reno <ul style="list-style-type: none"> ▪ Saint Mary's Regional Medical Center 	saintmarysreno-support@mobilemd.com
San Joaquin <ul style="list-style-type: none"> ▪ Saint Joseph's Medical Center ▪ Mark Twain 	stockton-support@mobilemd.com
Bakersfield <ul style="list-style-type: none"> ▪ Bakersfield Memorial Hospital ▪ Mercy Hospital 	Bakersfield-support@mobilemd.com
Bay Area <ul style="list-style-type: none"> ▪ St. Mary's Medical Center ▪ St. Francis Memorial Hospital 	BayArea-Support@mobilemd.com
Central Coast <ul style="list-style-type: none"> ▪ Marian Medical Center ▪ French Hospital Medical Center ▪ Arroyo Grande Community Hospital 	centralcoast-support@mobilemd.com
Arizona <ul style="list-style-type: none"> ▪ Chandler Regional Medical Center ▪ Mercy Gilbert Medical Center ▪ St. Joseph's Hospital and Medical Center 	arizona-support@mobilemd.com
Southern Nevada <ul style="list-style-type: none"> ▪ St. Rose Dominican Hospitals - Rose de Lima ▪ St. Rose Dominican Hospitals - San Martín ▪ St. Rose Dominican Hospitals - Siena 	strose-support@mobilemd.com
Merced <ul style="list-style-type: none"> ▪ Mercy Medical Center Merced 	mercymerced-support@mobilemd.com
San Bernardino <ul style="list-style-type: none"> ▪ Community Hospital of San Bernardino ▪ St. Bernadine's Medical Center 	inlandempire-support@mobilemd.com
Sequoia <ul style="list-style-type: none"> ▪ Sequoia Hospital 	sequoia-support@mobilemd.com

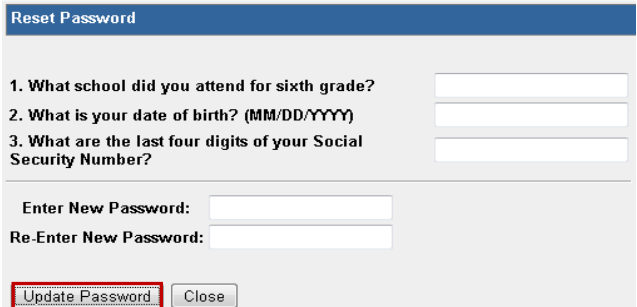
<p>Southern California</p> <ul style="list-style-type: none"> ▪ California Hospital Medical Center ▪ Glendale Memorial Hospital & Health Center ▪ Northridge Hospital Medical Center ▪ St. Mary's Medical Center - Long Beach 	<p>socal-support@mobilemd.com</p>
<p>When sending an email support request to MobileMD, please include the following information:</p> <ol style="list-style-type: none"> a. Description of issue or type of support requested, including screen shots to illustrate the issue. Please DO NOT include screenshots with Protected Health Information (PHI). b. User's name, email and phone number to contact. <p>Please do not include Patient Health Information that includes Patient Name, Date of Birth, Social Security Number, etc. If this information is necessary to describe the issue, please call our support line.</p>	

<h3>3 System Access and Password Management</h3>		
<h4>3.1 Log In</h4>		
Step	Action	Screen Shot
1	<p>Launch Internet Explorer and enter: www.dignityhealthmember.org/hie</p> <p>Select the appropriate site from the provided list.</p>	
2	<p>Enter the username and password provided and select Logon.</p>	
3		<p><i>The password is set to allow a user 3 logon attempts. The user will be locked out of the account after 3 unsuccessful logon attempts. Use the on-line self-help feature to change the password to have the password reset or select Contact Us link to email the appropriate support account.</i></p>
4		<p>Pop-ups are required to navigate the system. Click here for Pop-Up questions and instructions to allow pop ups.</p>

3.2 Log Out		
Step	Action	Screen Shot
1	Select Log Off tab found in the top right corner of the screen.	Change Password Log Off Contact Us
2	The system will log the user out automatically upon idle use of Clinical Portal.	

3.3 Change Password		
Step	Action	Screen Shot
1	From any of the screens within the application, click the Change Password link.	Change Password Log Off Contact Us
2	Enter current password and new password twice. Select OK to continue.	Old password: <input type="text"/> New password: <input type="text"/> Retype new: <input type="text"/> <input type="button" value="OK"/> <input type="button" value="Cancel"/>
Note: users cannot re-use their passwords, so the new password must be unique. All passwords are required to start with a letter, contain at least 6 characters, and contain both letters and numbers. The password may contain special characters (!@#\$%).		

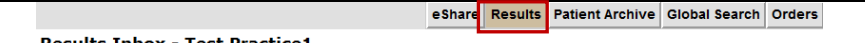

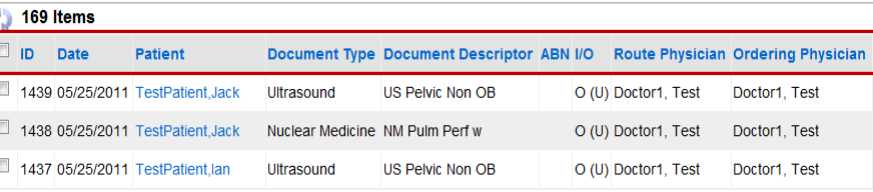
3.4 Forgot Password		
Step	Action	Screen Shot
1	Enter user ID in the log on screen and select Forgot your password?	

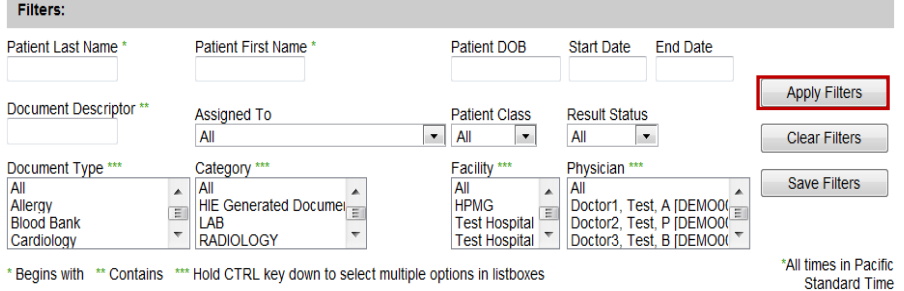
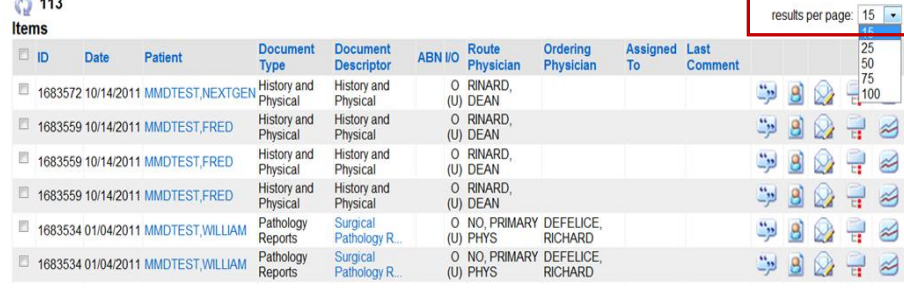
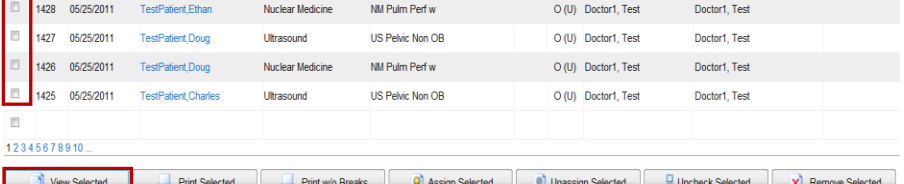
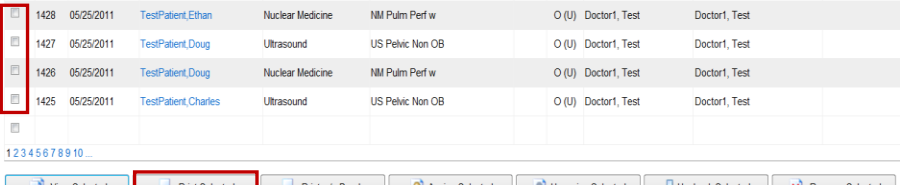
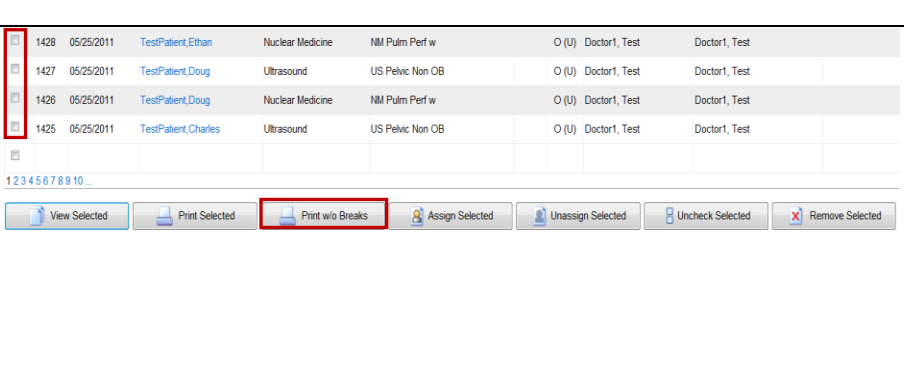
<p>2</p>	<p>Complete the security questions (captured during the first log on session).</p> <p>Enter new password and then confirm password.</p> <p>Select Update Password to complete.</p>	
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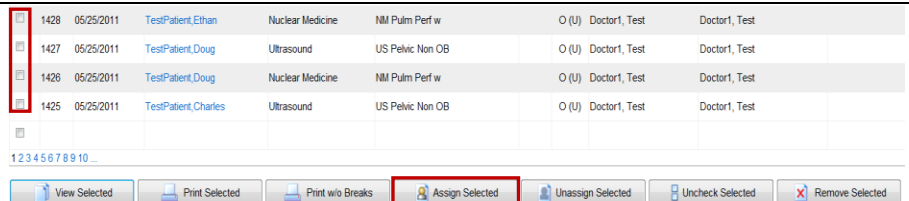
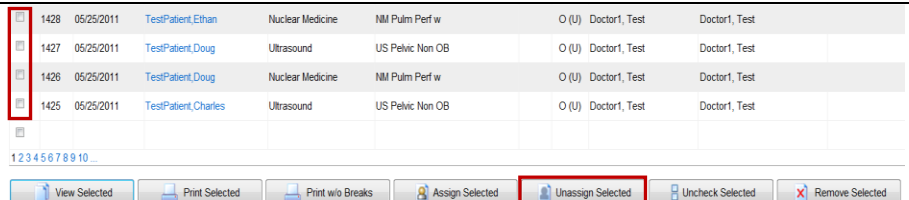
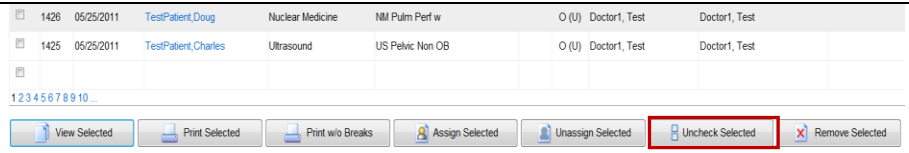
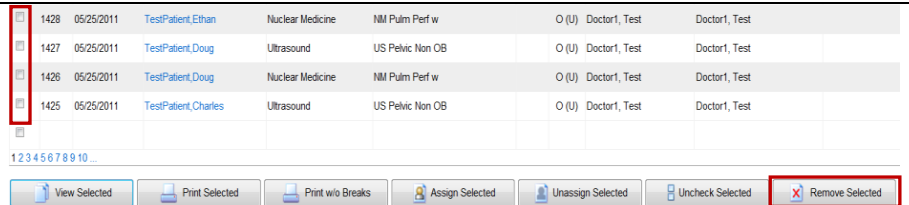





4 Results Module

This section of the help guide provides detailed steps for using the MobileMD Health Information Exchange Results module. The following sections will walk the user through how to use the various features of the Results module.

4.1 Results Inbox

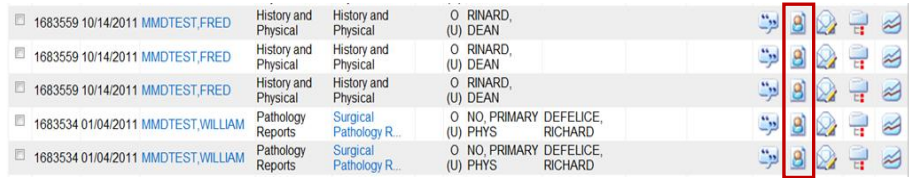
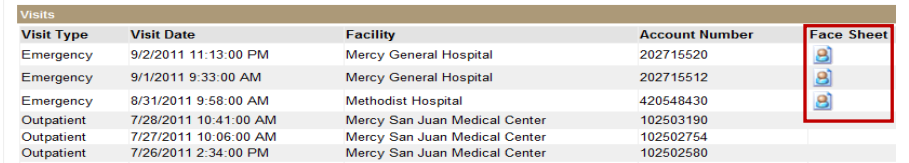
Step	Action	Screen Shot
1	Select the Results tab on the menu bar.	
2	<p>View Patient Document</p> <p>Select the highlighted patient name to view the document.</p>	
3	<p>Sort the Inbox</p> <p>Select the column headings to sort the inbox. Clicking the column header changes the sort order from ascending to descending.</p>	
4	<p>Filter the Results Inbox Documents</p> <p>Select from options available in the drop down lists to refine search results. To select multiple Document Types, Document Categories, Facilities, and Physicians, use the Ctrl key and click the intended items.</p> <ul style="list-style-type: none"> • Physician - Use this filter to show documents routed to one or more physicians. • Assigned To - Use this filter to show work items assigned to a practice user, if the practice is using this feature. • Patient Class - Use this filter to show results from a patient class, such as inpatient. • Document Type - Use this filter to show one or more document type, such as Chemistry. • Facility - Use this filter to show documents originating from one or more hospital facilities. • Date Range - Use this filter to show only documents from a specified date range. • Document Category - Use this filter to show documents from one or more specific categories such as LAB. • Results Status - Use this filter to show documents from a specific status, such as Final. 	

<p>5</p>	<p>Select Apply Filters to execute the search filters. Select Clear Filters to clear the search filters. Select Save Filter to save a default search filters for subsequent use. Select Clear Filter and then select Save Filter again to remove a Saved Filter. Otherwise, the filter will still be in place at the next log on.</p>																																																																							
<p>6</p>	<p>Patient Search Search for a patient’s results and reports in the inbox by entering the patient’s name in the Filter Search fields and selecting Apply Filters.</p>	 <p>Filters:</p> <p>Patient Last Name * Patient First Name * Patient DOB Start Date End Date</p> <p>Document Descriptor ** Assigned To Patient Class Result Status</p> <p>Document Type *** Category *** Facility *** Physician ***</p> <p>* Begins with ** Contains *** Hold CTRL key down to select multiple options in listboxes</p> <p style="text-align: right;">*All times in Pacific Standard Time</p>																																																																						
<p>7</p>	<p>Select number of items displayed in the Inbox Users can select how many items to view in the inbox page by selecting the number of items from the drop-down list located on the upper right hand side of the inbox.</p>	 <p>113 Items</p> <p>results per page: 15</p> <table border="1"> <thead> <tr> <th>ID</th> <th>Date</th> <th>Patient</th> <th>Document Type</th> <th>Document Descriptor</th> <th>ABN I/O</th> <th>Route Physician</th> <th>Ordering Physician</th> <th>Assigned To</th> <th>Last Comment</th> </tr> </thead> <tbody> <tr> <td>1683572</td> <td>10/14/2011</td> <td>MMDTEST,NEXTGEN</td> <td>History and Physical</td> <td>History and Physical</td> <td>O</td> <td>RINARD, (U) DEAN</td> <td></td> <td></td> <td></td> </tr> <tr> <td>1683559</td> <td>10/14/2011</td> <td>MMDTEST,FRED</td> <td>History and Physical</td> <td>History and Physical</td> <td>O</td> <td>RINARD, (U) DEAN</td> <td></td> <td></td> <td></td> </tr> <tr> <td>1683559</td> <td>10/14/2011</td> <td>MMDTEST,FRED</td> <td>History and Physical</td> <td>History and Physical</td> <td>O</td> <td>RINARD, (U) DEAN</td> <td></td> <td></td> <td></td> </tr> <tr> <td>1683559</td> <td>10/14/2011</td> <td>MMDTEST,FRED</td> <td>History and Physical</td> <td>History and Physical</td> <td>O</td> <td>RINARD, (U) DEAN</td> <td></td> <td></td> <td></td> </tr> <tr> <td>1683534</td> <td>01/04/2011</td> <td>MMDTEST,WILLIAM</td> <td>Pathology Reports</td> <td>Surgical Pathology R...</td> <td>O</td> <td>NO, PRIMARY (U) PHYS</td> <td>DEFELICE, RICHARD</td> <td></td> <td></td> </tr> <tr> <td>1683534</td> <td>01/04/2011</td> <td>MMDTEST,WILLIAM</td> <td>Pathology Reports</td> <td>Surgical Pathology R...</td> <td>O</td> <td>NO, PRIMARY (U) PHYS</td> <td>DEFELICE, RICHARD</td> <td></td> <td></td> </tr> </tbody> </table>	ID	Date	Patient	Document Type	Document Descriptor	ABN I/O	Route Physician	Ordering Physician	Assigned To	Last Comment	1683572	10/14/2011	MMDTEST,NEXTGEN	History and Physical	History and Physical	O	RINARD, (U) DEAN				1683559	10/14/2011	MMDTEST,FRED	History and Physical	History and Physical	O	RINARD, (U) DEAN				1683559	10/14/2011	MMDTEST,FRED	History and Physical	History and Physical	O	RINARD, (U) DEAN				1683559	10/14/2011	MMDTEST,FRED	History and Physical	History and Physical	O	RINARD, (U) DEAN				1683534	01/04/2011	MMDTEST,WILLIAM	Pathology Reports	Surgical Pathology R...	O	NO, PRIMARY (U) PHYS	DEFELICE, RICHARD			1683534	01/04/2011	MMDTEST,WILLIAM	Pathology Reports	Surgical Pathology R...	O	NO, PRIMARY (U) PHYS	DEFELICE, RICHARD		
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<p>8</p>	<p>View Selected Users can select multiple items at once by checking the item checkboxes and then selecting View Selected.</p>	 <p>1428 05/25/2011 TestPatient,Ethan Nuclear Medicine NM Pulm Perf w O (U) Doctor1, Test Doctor1, Test</p> <p>1427 05/25/2011 TestPatient,Doug Ultrasound US Pelvic Non OB O (U) Doctor1, Test Doctor1, Test</p> <p>1426 05/25/2011 TestPatient,Doug Nuclear Medicine NM Pulm Perf w O (U) Doctor1, Test Doctor1, Test</p> <p>1425 05/25/2011 TestPatient,Charles Ultrasound US Pelvic Non OB O (U) Doctor1, Test Doctor1, Test</p> <p>1 2 3 4 5 6 7 8 9 10</p> <p>View Selected Print Selected Print w/o Breaks Assign Selected Unassign Selected Uncheck Selected Remove Selected</p>																																																																						
<p>9</p>	<p>Print Selected Users can select one or more items (max 25 items in a print batch) by checking the item checkboxes and then selecting Print Selected.</p>	 <p>1428 05/25/2011 TestPatient,Ethan Nuclear Medicine NM Pulm Perf w O (U) Doctor1, Test Doctor1, Test</p> <p>1427 05/25/2011 TestPatient,Doug Ultrasound US Pelvic Non OB O (U) Doctor1, Test Doctor1, Test</p> <p>1426 05/25/2011 TestPatient,Doug Nuclear Medicine NM Pulm Perf w O (U) Doctor1, Test Doctor1, Test</p> <p>1425 05/25/2011 TestPatient,Charles Ultrasound US Pelvic Non OB O (U) Doctor1, Test Doctor1, Test</p> <p>1 2 3 4 5 6 7 8 9 10</p> <p>View Selected Print Selected Print w/o Breaks Assign Selected Unassign Selected Uncheck Selected Remove Selected</p>																																																																						
<p>10</p>	<p>Print w/o Breaks Users can print multiple records for the same patient without Page Breaks by checking the item checkboxes and selecting Print w/o Breaks. *Note – Feature is only available when records for the same patient are selected.</p>	 <p>1428 05/25/2011 TestPatient,Ethan Nuclear Medicine NM Pulm Perf w O (U) Doctor1, Test Doctor1, Test</p> <p>1427 05/25/2011 TestPatient,Doug Ultrasound US Pelvic Non OB O (U) Doctor1, Test Doctor1, Test</p> <p>1426 05/25/2011 TestPatient,Doug Nuclear Medicine NM Pulm Perf w O (U) Doctor1, Test Doctor1, Test</p> <p>1425 05/25/2011 TestPatient,Charles Ultrasound US Pelvic Non OB O (U) Doctor1, Test Doctor1, Test</p> <p>1 2 3 4 5 6 7 8 9 10</p> <p>View Selected Print Selected Print w/o Breaks Assign Selected Unassign Selected Uncheck Selected Remove Selected</p>																																																																						


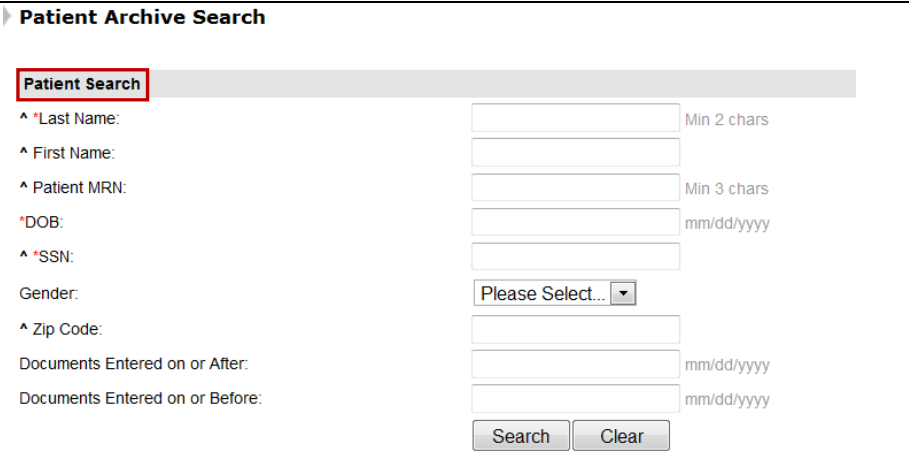
<p>11</p>	<p>Assign Selected</p> <p>Users can assign items to staff members by clicking the item checkboxes and then selecting Assign Selected.</p>	
<p>12</p>	<p>Unassign Selected</p> <p>Users can unassign items to staff members by clicking the item checkboxes and then selecting Unassign Selected.</p>	
<p>13</p>	<p>Uncheck Selected</p> <p>Users can uncheck all selected items by selecting Uncheck Selected.</p>	
<p>14</p>	<p>Remove Selected</p> <p>Users can remove selected items by checking the item checkboxes and then selecting Remove Selected.</p> <p>*Note - Items are removed from the Inbox but will always be available in the patient's Document Tree.</p>	
<p>15</p>	<p>Enter comments</p> <p>Users can enter comments for a specific result or report by selecting the Comments icon.  The most recently entered comment will display in the inbox. Users can view older comments by clicking the same Comment icon.</p>	
<p>16</p>	<p>View Visit Face sheet</p> <p>Users can view the visit face sheet related to any result by selecting the Face sheet icon.  A summary of the most current patient demographics, along with any available visit-related data will display in a separate dialog window.</p>	
<p>17</p>	<p>New eShare Message</p> <p>Users can create an eShare Message from an item by selecting the eShare icon.  A New eShare Message box will open in a separate dialog window. See Create and Send New eShare Messages.</p>	
<p>18</p>	<p>Access Document Tree</p> <p>Users can access all documents routed to their results inbox over time for a particular patient by selecting the Document Tree icon.  See Document Tree.</p>	
<p>19</p>	<p>View Flow Sheets</p> <p>Users can view patient Flow sheets that graph patient progress of laboratory values over a period by selecting the View Flow Sheets icon.  See Flow Sheets.</p>	

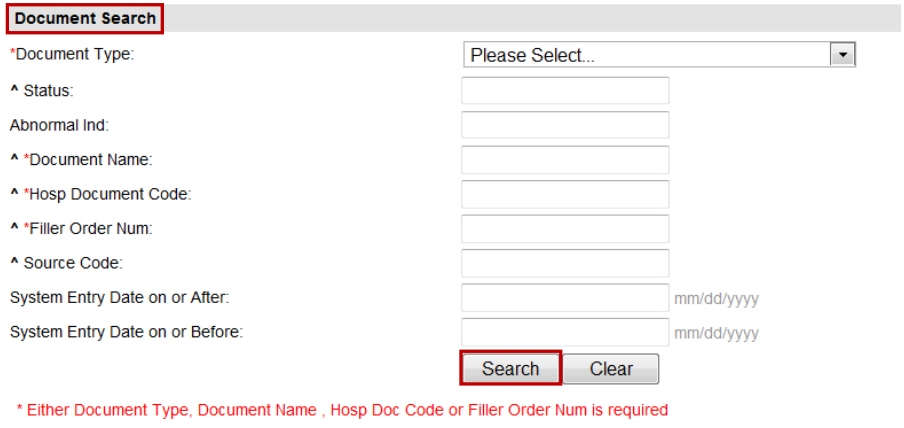
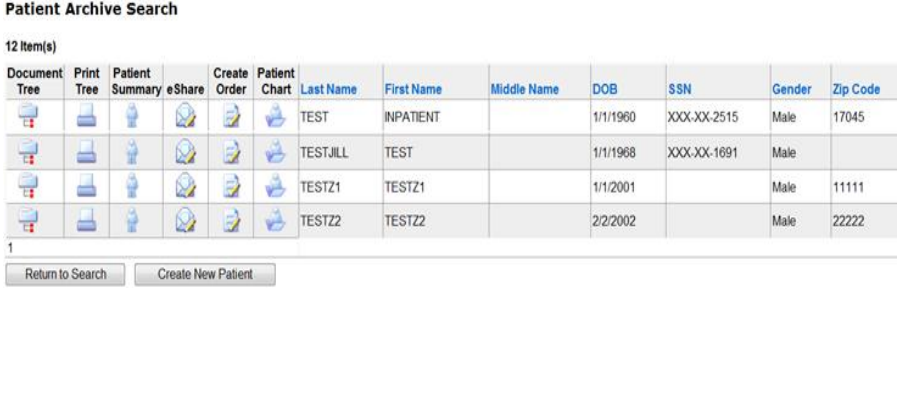
4.2 Face Sheets

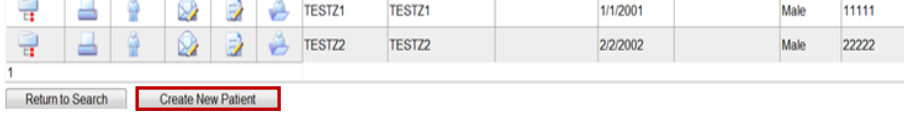
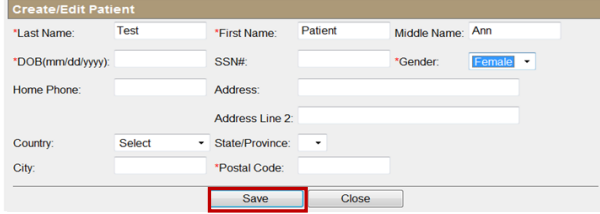
User authorization is required to access Face Sheets. The Face Sheet icon is available from the Results Inbox and within Patient Summary.

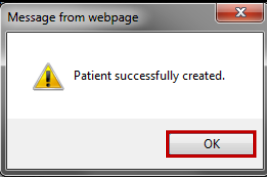
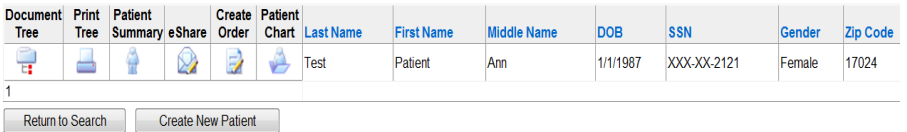
Step	Action	Screen Shot
1	Select the Face sheet icon located in the Results Inbox .	
2	Patient Summary Page Select the Face Sheet icon located in the Visit Section.	
3	If the Face Sheet is more than 90 days old, (some sites configured at 120 days or more), hovering the mouse over the icon will display the message, Expired face sheet .	
4	Select Print at the bottom of the screen to print the Patient Summary screen. Select Close to close window.	

4.3 Patient Archive Search


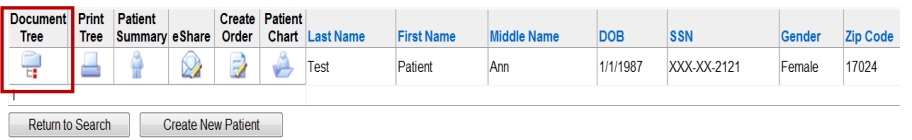


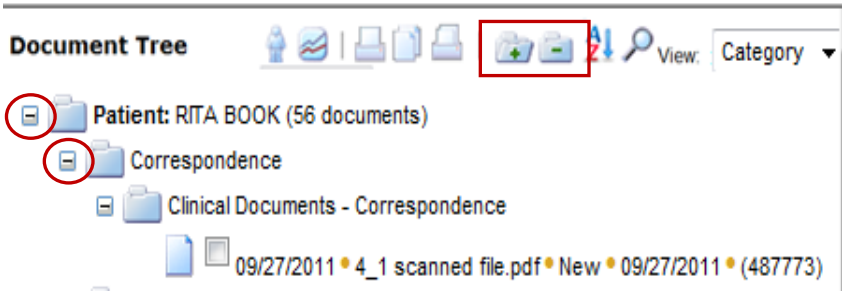
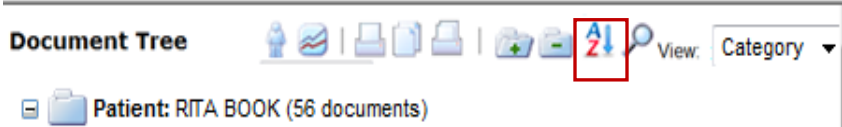
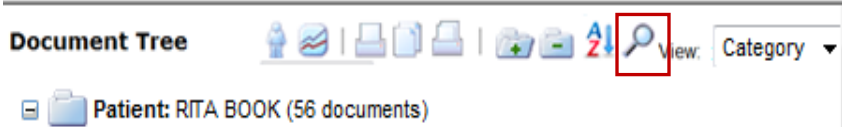
Step	Action	Screen Shot
1	Select Patient Archive tab in the menu bar.	
2	Enter patient attributes into the open search fields. Select Search to execute query.	







3	<p>Select the Document Type or by enter document and result attributes into the open search fields.</p> <p>Select Search to execute query.</p>	 <p>Document Search</p> <p>*Document Type: <input type="text" value="Please Select..."/></p> <p>^ Status: <input type="text"/></p> <p>Abnormal Ind: <input type="text"/></p> <p>^ *Document Name: <input type="text"/></p> <p>^ *Hosp Document Code: <input type="text"/></p> <p>^ *Filler Order Num: <input type="text"/></p> <p>^ Source Code: <input type="text"/></p> <p>System Entry Date on or After: <input type="text"/> mm/dd/yyyy</p> <p>System Entry Date on or Before: <input type="text"/> mm/dd/yyyy</p> <p><input type="button" value="Search"/> <input type="button" value="Clear"/></p> <p>* Either Document Type, Document Name , Hosp Doc Code or Filler Order Num is required</p>																																																																	
4	<p>Notes:</p> <ul style="list-style-type: none"> * Only a Patient Search OR a Document Search can be used at a time. * If a Document Search was completed, the patient Document Tree will only display the Document Type filtered in the search query. * Complete a Patient Search to view the complete patient Document Tree. 																																																																		
5	<p>The Patient Archive Search results display patients matching the search criteria entered.</p> <p>Selection options include Document Tree, Print Tree, Patient Summary, eShare, Create Order, and Patient Charting (see Patient Charting Manual for instructions).</p>	 <p>Patient Archive Search</p> <p>12 Item(s)</p> <table border="1"> <thead> <tr> <th>Document Tree</th> <th>Print Tree</th> <th>Patient Summary</th> <th>eShare</th> <th>Create Order</th> <th>Patient Chart</th> <th>Last Name</th> <th>First Name</th> <th>Middle Name</th> <th>DOB</th> <th>SSN</th> <th>Gender</th> <th>Zip Code</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>TEST</td> <td>INPATIENT</td> <td></td> <td>1/1/1960</td> <td>XXX-XX-2515</td> <td>Male</td> <td>17045</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>TESTJILL</td> <td>TEST</td> <td></td> <td>1/1/1968</td> <td>XXX-XX-1691</td> <td>Male</td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>TESTZ1</td> <td>TESTZ1</td> <td></td> <td>1/1/2001</td> <td></td> <td>Male</td> <td>11111</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>TESTZ2</td> <td>TESTZ2</td> <td></td> <td>2/2/2002</td> <td></td> <td>Male</td> <td>22222</td> </tr> </tbody> </table> <p><input type="button" value="Return to Search"/> <input type="button" value="Create New Patient"/></p>	Document Tree	Print Tree	Patient Summary	eShare	Create Order	Patient Chart	Last Name	First Name	Middle Name	DOB	SSN	Gender	Zip Code							TEST	INPATIENT		1/1/1960	XXX-XX-2515	Male	17045							TESTJILL	TEST		1/1/1968	XXX-XX-1691	Male								TESTZ1	TESTZ1		1/1/2001		Male	11111							TESTZ2	TESTZ2		2/2/2002		Male	22222
Document Tree	Print Tree	Patient Summary	eShare	Create Order	Patient Chart	Last Name	First Name	Middle Name	DOB	SSN	Gender	Zip Code																																																							
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						TESTZ2	TESTZ2		2/2/2002		Male	22222																																																							


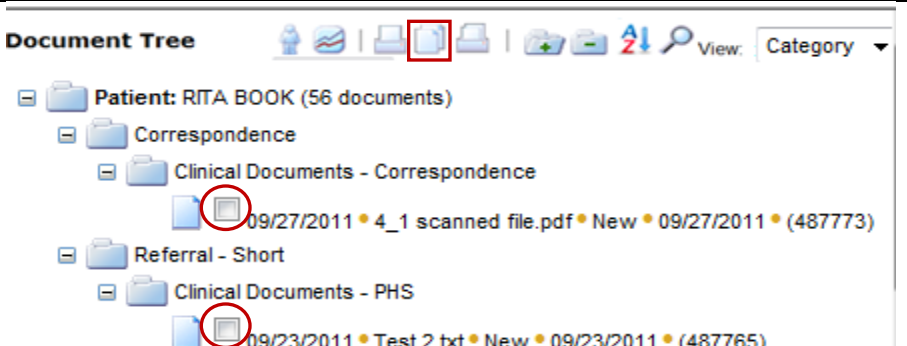
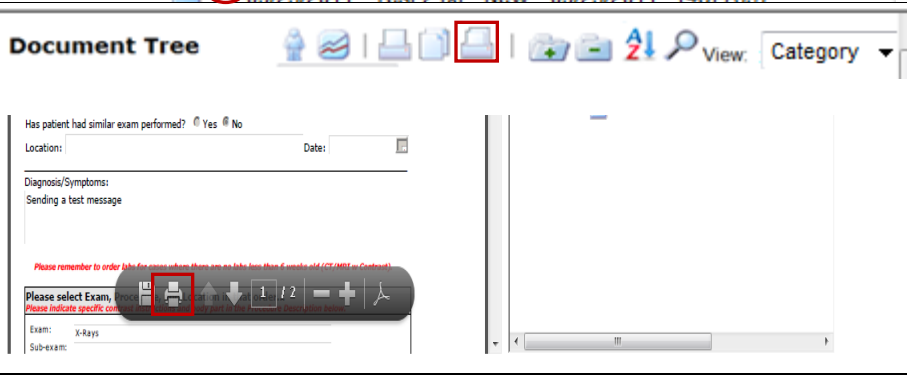
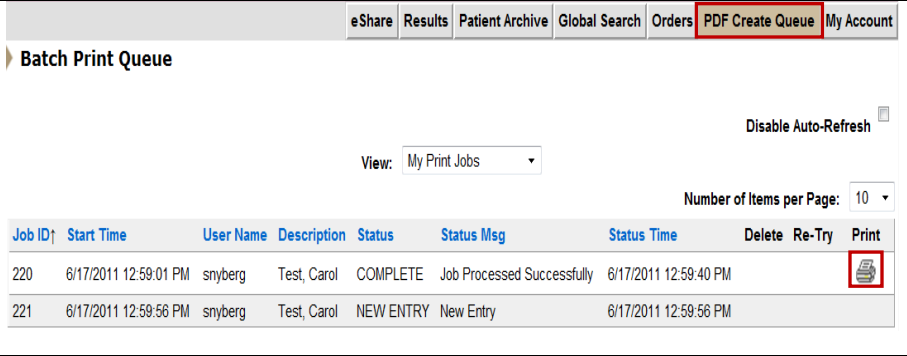

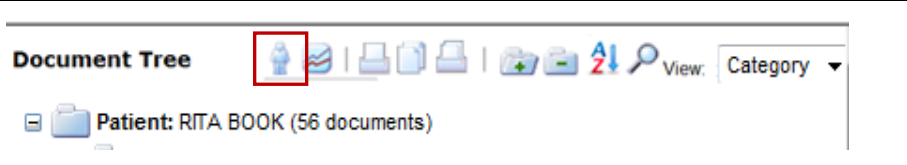

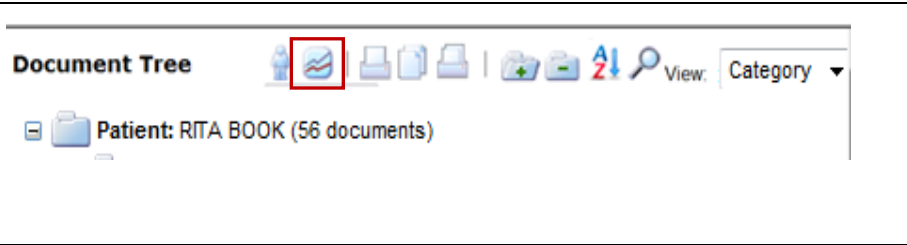
4.4 Create a New Patient		
Step	Action	Screen Shot
1	Perform a Patient Archive Search .	
2	Select Create New Patient if the patient is not found.	
3	<p>Enter the patient demographic data in the Create/Edit Patient box.</p> <p>Select Save to continue.</p>	 <p>Create/Edit Patient</p> <p>*Last Name: <input type="text" value="Test"/> *First Name: <input type="text" value="Patient"/> Middle Name: <input type="text" value="Ann"/></p> <p>*DOB(mm/dd/yyyy): <input type="text"/> SSN#: <input type="text"/> *Gender: <input type="text" value="Female"/></p> <p>Home Phone: <input type="text"/> Address: <input type="text"/></p> <p>Address Line 2: <input type="text"/></p> <p>Country: <input type="text" value="Select"/> State/Province: <input type="text"/></p> <p>City: <input type="text"/> *Postal Code: <input type="text"/></p> <p><input type="button" value="Save"/> <input type="button" value="Close"/></p>

4	A pop-up will display “ Patient successfully created. ” Select OK to continue.	
5	The patient is displayed in the Patient Archive Search screen.	

4.5 Document Tree

Step	Action	Screen Shot
1	Select the Document Tree icon  to view patient documents.	
2	Select the Plus/Minus boxes to expand/collapse single document folders. Expand all folders at once by selecting the Expand icon.  Collapse all folders by selecting the Collapse icon. 	
3	Ascending/ Descending Sort Sort the Document Tree view ascending or descending by selecting the Sort icon.	
4	Find documents listed in the patient’s document tree by completing a Filter Search . Select the Filter icon. Select the Category, Date or Visit from the dropdown.	

<p>5</p>	<p>Category Search Select Category from the dropdown window in the View section. Select the Filter icon. Enter the date into the From field and the To field. Select Apply Filter to execute search.</p>	<p>Document Tree</p>  <p>Filters</p> <p>From: <input type="text"/> To: <input type="text"/></p> <p>Clear Filter Apply Filter</p> <p>[-] Patient: FRED MMDTEST (51 documents)</p> <ul style="list-style-type: none"> [-] Lab Results <ul style="list-style-type: none"> + Unmapped Lab + Chemistry + Hematology
<p>6</p>	<p>Date Search Select Date from the dropdown window in the View section. Select the Filter icon. Enter the date into the From field and the To field. Select Apply Filter to execute search.</p>	<p>Document Tree</p>  <p>Filters</p> <p>From: <input type="text"/> To: <input type="text"/></p> <p>Clear Filter Apply Filter</p> <p>[-] Patient: WILLIAM MMDTEST (50 documents)</p> <ul style="list-style-type: none"> [-] 2011 <ul style="list-style-type: none"> [-] October <ul style="list-style-type: none"> + 10/13/2011 + 10/4/2011 + 10/3/2011 [-] September
<p>7</p>	<p>Visit Search Select Visit from the dropdown window in the View section. Select the Filter icon. Enter the date into the From field and the To field or enter the Account Number. Select Apply Filter to execute search.</p>	<p>Document Tree</p>  <p>Filters</p> <p>From: <input type="text" value="8/19/2011"/> To: <input type="text" value="10/18/2011"/></p> <p>Account Number: <input type="text"/></p> <p>Sort Date: <input type="text" value="Descending"/></p> <p>Clear Filter Apply Filter</p> <p>[-] Patient: FRED MMDTEST (51 documents)</p> <ul style="list-style-type: none"> + 654321111
<p>8</p>	<p>View a document Click the document name to view a single document. Select the Print Document in Viewer Window  icon to print documents.</p>	<p>Document Tree</p>  <p>[-] Patient: RITA BOOK (56 documents)</p> <ul style="list-style-type: none"> [-] Correspondence <ul style="list-style-type: none"> [-] Clinical Documents - Correspondence <ul style="list-style-type: none">  09/27/2011 • 4_1 scanned file.pdf • New • 09/27/2011 • (487773) [-] Referral - Short <ul style="list-style-type: none"> [-] Clinical Documents - PHS

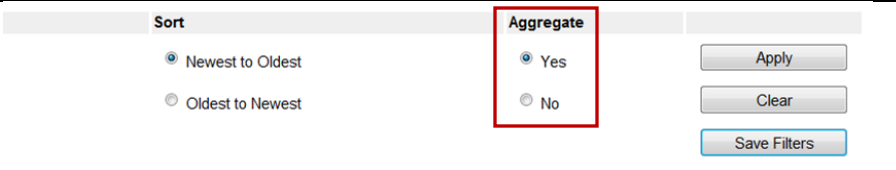

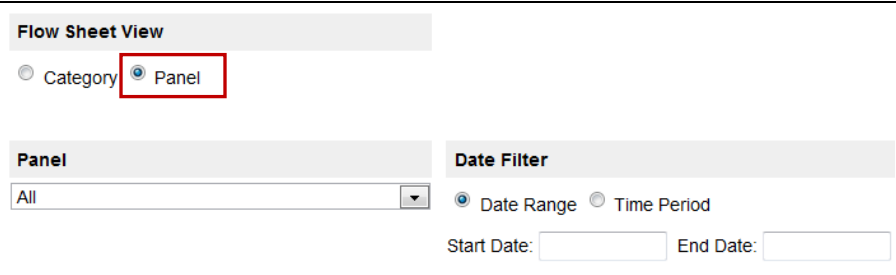
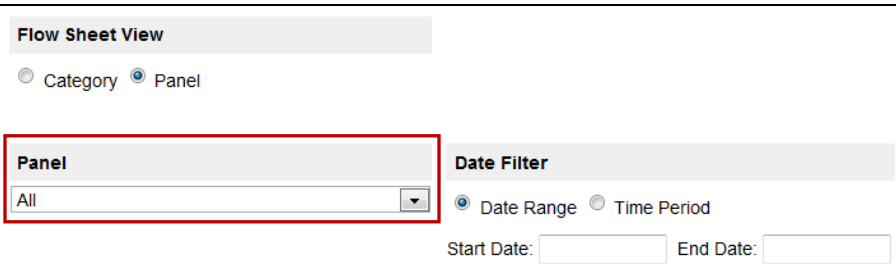
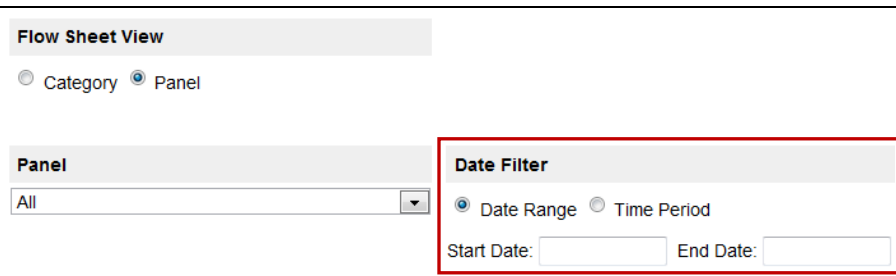
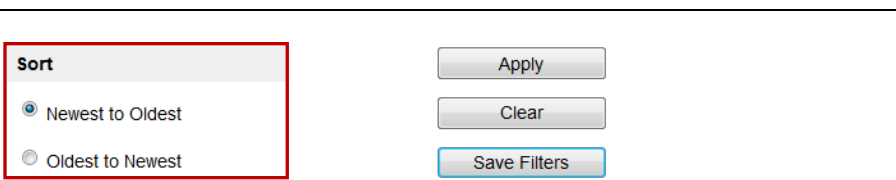
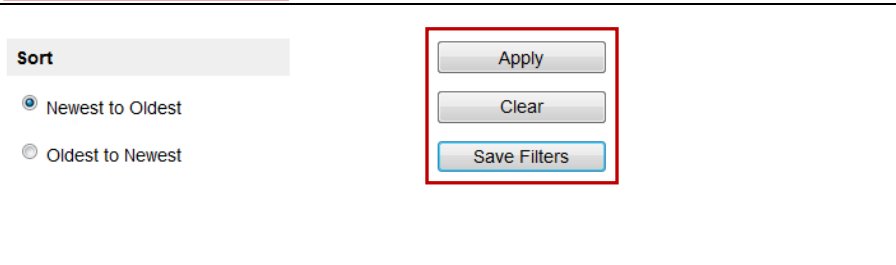
<p>9</p>	<p>Select one or more of the checkboxes to view multiple documents.</p> <p>Select the Create PDF of Selected Documents icon.</p> 																															
<p>10</p>	<p>The user can create a batch print file to be printed later by selecting the Batch Print icon.</p> <p>To Print documents in the Document viewer, scroll over the document viewer page and select the Print icon located on the dialog screen.</p>																															
<p>11</p>	<p>Queued items will wait in the Batch Print PDF Create Queue to be printed.</p> <p>Select PDR Create Queue to view the queue. Select on the Print icon to print the batch. See PDF Creation - Printing and Saving Multiple Documents.</p>	 <table border="1"> <thead> <tr> <th>Job ID</th> <th>Start Time</th> <th>User Name</th> <th>Description</th> <th>Status</th> <th>Status Msg</th> <th>Status Time</th> <th>Delete</th> <th>Re-Try</th> <th>Print</th> </tr> </thead> <tbody> <tr> <td>220</td> <td>6/17/2011 12:59:01 PM</td> <td>snyberg</td> <td>Test, Carol</td> <td>COMPLETE</td> <td>Job Processed Successfully</td> <td>6/17/2011 12:59:40 PM</td> <td></td> <td></td> <td></td> </tr> <tr> <td>221</td> <td>6/17/2011 12:59:56 PM</td> <td>snyberg</td> <td>Test, Carol</td> <td>NEW ENTRY</td> <td>New Entry</td> <td>6/17/2011 12:59:56 PM</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Job ID	Start Time	User Name	Description	Status	Status Msg	Status Time	Delete	Re-Try	Print	220	6/17/2011 12:59:01 PM	snyberg	Test, Carol	COMPLETE	Job Processed Successfully	6/17/2011 12:59:40 PM				221	6/17/2011 12:59:56 PM	snyberg	Test, Carol	NEW ENTRY	New Entry	6/17/2011 12:59:56 PM			
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<p><i>*Some of the documents uploaded through Document Delivery may be of several different formats and may not be viewed in Multiple Document View mode.</i></p>																																
<p>12</p>	<p>Select the Patient Summary icon to display patient information.  See Patient Summary.</p>																															
<p>13</p>	<p>Select the View Flow Sheets icon to view Flow sheets that graph patient progress of laboratory values over a period of time.  See Flow Sheets.</p>																															
<p>Additional information regarding the Document Tree:</p> <ul style="list-style-type: none"> • Batch printing one or more documents is especially helpful for printing large print jobs. The documents will be queued for PDF Conversion and available for saving or printing by selecting PDF Create Queue. • PDF files must be printed by using the print icon located on the document viewer. • Refresh the Document Tree to ensure the most recent delivered documents are available in the inbox by clicking on the Refresh icon. 																																

- Select **Unselect** to uncheck selected documents.

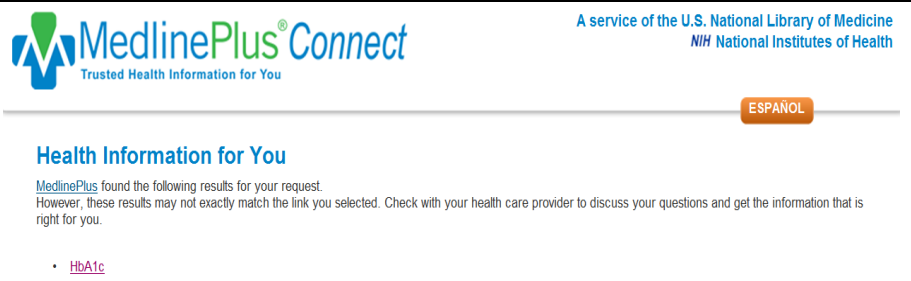
4.6 Flow Sheets

User authorization is required to access Flow Sheet. The Flow Sheet icon is available for selection in the Results Inbox and the patient Document Tree.


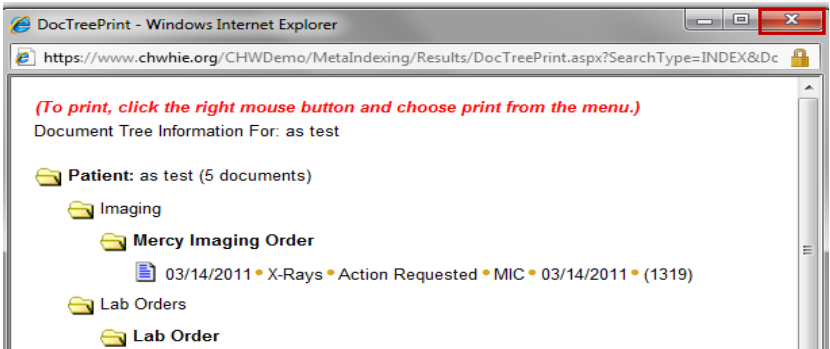
Step	Action	Screen Shot
1	Select the Flow Sheet icon located in the Results inbox. The screen will default to Flow Sheets.	
2	Select the Document Tree icon from the Results Inbox or complete a Patient Archive Search for the intended patient. Select the Document Tree icon. Select the Flow Sheet icon.	
	Category Flow Sheet Select Category in the Flow Sheet View.	
3	Select the dropdown arrow in Flow Sheet Category the available category options.	
4	Select the intended radio button for the Date Filter; Date Range or Time Period , and then enter the Start and End Date .	
5	Select the intended radio button for Sorting options - Newest to Oldest, Oldest to Newest .	

6	<p>Select the intended radio button for the Aggregate display.</p>	
7	<p>By selecting Yes, the test results from all test locations are grouped and displayed together in one row. By selecting No, the test results from multiple test locations are isolated by laboratory and displayed in one row.</p>	
8	<p>Select Apply to execute search. Select Clear to clear search filter options. Select Save to save search filter as the default search setting.</p>	
9	<p>Panel Flow Sheet Select Panel in the Flow Sheet View.</p>	
10	<p>Select the dropdown arrow in the Panel section and select from the displayed Panels.</p>	
11	<p>Enter the Date Filter; Date Range or Time Period.</p>	
12	<p>Enter the Sort Filter; Newest to Oldest or Oldest to Newest</p>	
13	<p>Select Apply to execute search. Select Clear to clear search filter options. Select Save to save search filter as the default search setting.</p>	

<p>14</p>	<p>View Results</p> <p>Abnormal results are displayed in red.</p> <p>Normal results are displayed in black.</p> <p>Click the intended test result value to show test comments.</p>	<table border="1"> <thead> <tr> <th>Graph</th> <th>Info</th> <th>Test</th> <th>Units</th> <th>1/2/2012</th> <th>12/16/2011</th> <th>12/6/2011</th> <th>11/20/2011</th> <th>11/8/2011</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td>Cholesterol - Serum/Plasma</td> <td>mg/dL</td> <td></td> <td></td> <td></td> <td>200</td> <td></td> </tr> <tr> <td></td> <td></td> <td>Cholesterol in HDL [Mass/volume] in Serum or Plasma</td> <td>mg/dL</td> <td></td> <td></td> <td></td> <td>90(H)</td> <td></td> </tr> <tr> <td></td> <td></td> <td>Hemoglobin A1c/Hemoglobin.total in Blood</td> <td>%, % Hgb</td> <td>9(H)</td> <td>8.7(H)</td> <td>8.5(H)</td> <td></td> <td></td> </tr> </tbody> </table>	Graph	Info	Test	Units	1/2/2012	12/16/2011	12/6/2011	11/20/2011	11/8/2011			Cholesterol - Serum/Plasma	mg/dL				200				Cholesterol in HDL [Mass/volume] in Serum or Plasma	mg/dL				90(H)				Hemoglobin A1c/Hemoglobin.total in Blood	%, % Hgb	9(H)	8.7(H)	8.5(H)		
Graph	Info	Test	Units	1/2/2012	12/16/2011	12/6/2011	11/20/2011	11/8/2011																														
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<p>15</p>	<p>A dialog window will display the test date, test name, test result, lab range and comments.</p> <p>Comments cannot be added, deleted or edited.</p>	<p>Comments</p> <p>Observation Date: 10/13/2011 9:12:27 PM Test Code: CREAT Test Name: Creatinine Value (Units): 1.63 (mg/dL) Lab Range: 0.50-1.50 Comments</p> <ul style="list-style-type: none"> Incorrect result(s) originally reported as: 1.21 Corrected result(s) called to _rn by lab @ 09/09/2011 10:43 Reason for correction: _misread script 																																				
<p>16</p>	<p>View Results in a Graph</p> <p>Select the Flow Sheet icon in the Graph column to view a test result in a graph.</p>	<table border="1"> <thead> <tr> <th>Graph</th> <th>Info</th> <th>Test</th> <th>Units</th> <th>1/2/2012</th> <th>12/16/2011</th> <th>12/6/2011</th> <th>11/20/2011</th> <th>11/8/2011</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td>Cholesterol - Serum/Plasma</td> <td>mg/dL</td> <td></td> <td></td> <td></td> <td>200</td> <td></td> </tr> <tr> <td></td> <td></td> <td>Cholesterol in HDL [Mass/volume] in Serum or Plasma</td> <td>mg/dL</td> <td></td> <td></td> <td></td> <td>90(H)</td> <td></td> </tr> <tr> <td></td> <td></td> <td>Hemoglobin A1c/Hemoglobin.total in Blood</td> <td>%, % Hgb</td> <td>9(H)</td> <td>8.7(H)</td> <td>8.5(H)</td> <td></td> <td></td> </tr> </tbody> </table>	Graph	Info	Test	Units	1/2/2012	12/16/2011	12/6/2011	11/20/2011	11/8/2011			Cholesterol - Serum/Plasma	mg/dL				200				Cholesterol in HDL [Mass/volume] in Serum or Plasma	mg/dL				90(H)				Hemoglobin A1c/Hemoglobin.total in Blood	%, % Hgb	9(H)	8.7(H)	8.5(H)		
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<p>17</p>	<p>A dialog window displays the test results in a graph.</p> <p>Select the Print icon to print the graph.</p> <p>Select the 'X' in the window to close.</p>	<p>Flow Sheet</p> <p>Patient Name: Parker, Mary Date of Birth: 7/4/1965</p> <p>mg/dL</p> <p>Observation Date</p>																																				
<p>18</p>	<p>Select the Info icon for a test result row item (Only available on Category Test Results).</p> <p>A web page browser will open and redirect to Medline Plus Connect.</p>	<table border="1"> <thead> <tr> <th>Graph</th> <th>Info</th> <th>Test</th> <th>Units</th> <th>1/2/2012</th> <th>12/16/2011</th> <th>12/6/2011</th> <th>11/20/2011</th> <th>11/8/2011</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td>Cholesterol - Serum/Plasma</td> <td>mg/dL</td> <td></td> <td></td> <td></td> <td>200</td> <td></td> </tr> <tr> <td></td> <td></td> <td>Cholesterol in HDL [Mass/volume] in Serum or Plasma</td> <td>mg/dL</td> <td></td> <td></td> <td></td> <td>90(H)</td> <td></td> </tr> <tr> <td></td> <td></td> <td>Hemoglobin A1c/Hemoglobin.total in Blood</td> <td>%, % Hgb</td> <td>9(H)</td> <td>8.7(H)</td> <td>8.5(H)</td> <td></td> <td></td> </tr> </tbody> </table>	Graph	Info	Test	Units	1/2/2012	12/16/2011	12/6/2011	11/20/2011	11/8/2011			Cholesterol - Serum/Plasma	mg/dL				200				Cholesterol in HDL [Mass/volume] in Serum or Plasma	mg/dL				90(H)				Hemoglobin A1c/Hemoglobin.total in Blood	%, % Hgb	9(H)	8.7(H)	8.5(H)		
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19	<p>The Medline Plus page displays information related to the selected test.</p> <p>If no information is displayed, complete a Search Query.</p>	 <p>MedlinePlus found the following results for your request. However, these results may not exactly match the link you selected. Check with your health care provider to discuss your questions and get the information that is right for you.</p> <ul style="list-style-type: none"> HbA1c
20	<p>Select CTRL-P to print.</p> <p>Select 'X' to close window.</p>	
21	<p>Export Flow Sheet Results</p> <p>Select the Export to Excel.</p> <p>Results will generate an excel worksheet.</p>	<p>Patient Name: MMDTEST, WILLIAM Date of Birth: 8/15/1968</p> <p>Aggregate tests considered equivalent for Flow Sheet viewing only</p> <p>Export to Excel</p>

4.7 Print Document Tree

Step	Action	Screen Shot																																																																	
1	<p>Select the Print Tree icon from the Patient Archive Search to display and print a list of the documents contained in the patient Document Tree. </p>	<p>Patient Archive Search</p> <p>18 Item(s)</p> <table border="1"> <thead> <tr> <th>Document Tree</th> <th>Print Tree</th> <th>Patient Summary</th> <th>eShare</th> <th>Create Order</th> <th>Patient Chart</th> <th>Last Name</th> <th>First Name</th> <th>Middle Name</th> <th>DOB</th> <th>SSN</th> <th>Gender</th> <th>Zip Code</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>TEST</td> <td>**BABY (LISA)</td> <td></td> <td>1/1/1900</td> <td></td> <td>U</td> <td>95858</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>TEST</td> <td>3MER</td> <td></td> <td>1/26/1982</td> <td></td> <td>Female</td> <td>95819</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Test</td> <td>A.P</td> <td></td> <td>1/1/1987</td> <td>XXX-XX-1354</td> <td>Male</td> <td>35209</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>TEST</td> <td>AMELEAH</td> <td></td> <td>10/10/1939</td> <td>XXX-XX-1569</td> <td>Female</td> <td>35209</td> </tr> </tbody> </table>	Document Tree	Print Tree	Patient Summary	eShare	Create Order	Patient Chart	Last Name	First Name	Middle Name	DOB	SSN	Gender	Zip Code							TEST	**BABY (LISA)		1/1/1900		U	95858							TEST	3MER		1/26/1982		Female	95819							Test	A.P		1/1/1987	XXX-XX-1354	Male	35209							TEST	AMELEAH		10/10/1939	XXX-XX-1569	Female	35209
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2	<p>A dialog screen will create a list of the documents contained in the patients Document Tree.</p> <p>Click the right mouse button and choose Print from the menu or select Ctrl-P.</p> <p>Select the red X in the corner to close the window.</p>	 <p>DocTreePrint - Windows Internet Explorer</p> <p>https://www.chwhie.org/CHWDemo/MetaIndexing/Results/DocTreePrint.aspx?SearchType=INDEX&Dc</p> <p>(To print, click the right mouse button and choose print from the menu.)</p> <p>Document Tree Information For: as test</p> <ul style="list-style-type: none"> Patient: as test (5 documents) <ul style="list-style-type: none"> Imaging Mercy Imaging Order <ul style="list-style-type: none"> 03/14/2011 • X-Rays • Action Requested • MIC • 03/14/2011 • (1319) Lab Orders Lab Order 																																																																	

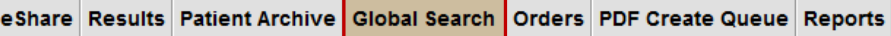
4.8 Patient Summary



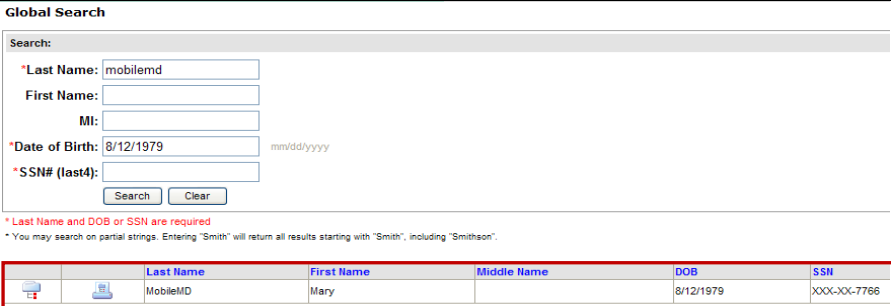

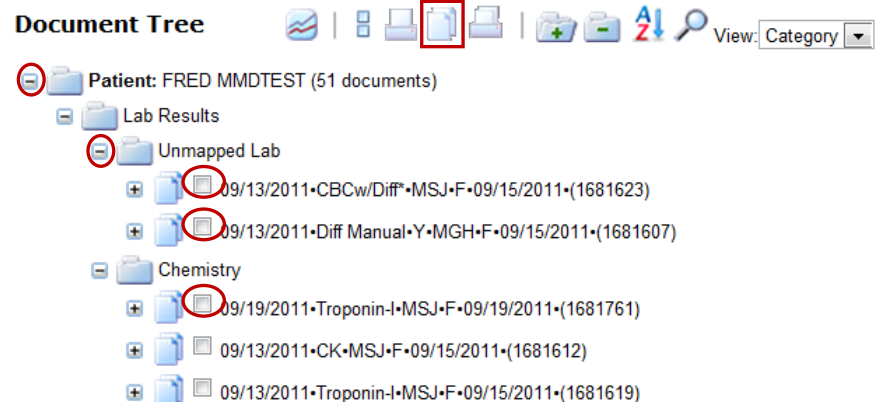
Step	Action	Screen Shot
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1	Select the Patient Summary icon  from the Patient Archive Search screen.	<p>Patient Archive Search</p> <p>18 Item(s)</p> <table border="1"> <thead> <tr> <th>Document Tree</th> <th>Print Tree</th> <th>Patient Summary</th> <th>eShare</th> <th>Create Order</th> <th>Patient Chart</th> <th>Last Name</th> <th>First Name</th> <th>Middle Name</th> <th>DOB</th> <th>SSN</th> <th>Gender</th> <th>Zip Code</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>TEST</td> <td>**BABY (LISA)</td> <td></td> <td>1/1/1900</td> <td></td> <td>U</td> <td>95858</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>TEST</td> <td>3MER</td> <td></td> <td>1/26/1982</td> <td></td> <td>Female</td> <td>95819</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Test</td> <td>A.P</td> <td></td> <td>1/1/1987</td> <td>XXX-XX-1354</td> <td>Male</td> <td>35209</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>TEST</td> <td>AMELEAH</td> <td></td> <td>10/10/1939</td> <td>XXX-XX-1569</td> <td>Female</td> <td>35209</td> </tr> </tbody> </table>	Document Tree	Print Tree	Patient Summary	eShare	Create Order	Patient Chart	Last Name	First Name	Middle Name	DOB	SSN	Gender	Zip Code							TEST	**BABY (LISA)		1/1/1900		U	95858							TEST	3MER		1/26/1982		Female	95819							Test	A.P		1/1/1987	XXX-XX-1354	Male	35209							TEST	AMELEAH		10/10/1939	XXX-XX-1569	Female	35209
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2	The Patient Summary screen displays patient demographics, Medical Record Number and Visit information.	<p>Patient Summary</p> <p>Test Patient1</p> <p>Gender: F DOB: 08/12/1979 SSN: XXX-XX-7766 Home Phone: (800)111-2222 Address: 123 WEST OAK ST SACRAMENTO, CA 95832</p> <p>Medical Record Numbers</p> <table border="1"> <thead> <tr> <th>Patient MRN</th> <th>Facility</th> <th>Last Visit</th> </tr> </thead> <tbody> <tr> <td>DEMO900001</td> <td>Test Hospital 1</td> <td>12/1/2008 9:05:00 PM</td> </tr> </tbody> </table> <p>1</p> <p>Visits</p> <table border="1"> <thead> <tr> <th>Visit Type</th> <th>Visit Date</th> <th>Facility</th> <th>Account Number</th> <th>Face Sheet</th> </tr> </thead> <tbody> <tr> <td>Emergency</td> <td>12/1/2008 9:05:00 PM</td> <td>Test Hospital 1</td> <td>EADEMOTEST001</td> <td></td> </tr> </tbody> </table>	Patient MRN	Facility	Last Visit	DEMO900001	Test Hospital 1	12/1/2008 9:05:00 PM	Visit Type	Visit Date	Facility	Account Number	Face Sheet	Emergency	12/1/2008 9:05:00 PM	Test Hospital 1	EADEMOTEST001																																																		
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3	Select the Face Sheet associated with the visit.																																																																		
4	Select Print at the bottom of the screen to print the Patient Summary screen. Select Close to close window.																																																																		

4.9 Global Search

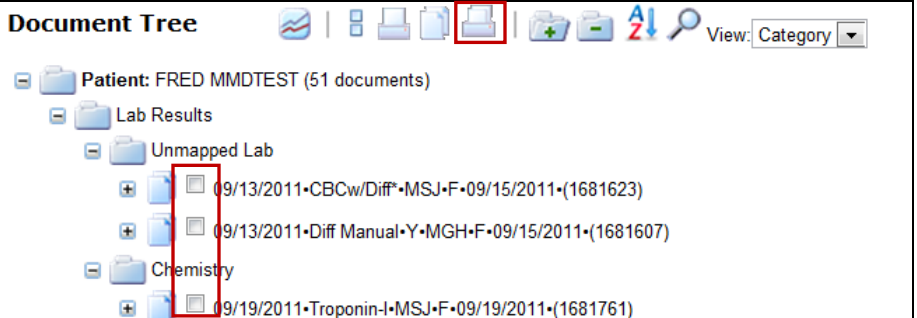
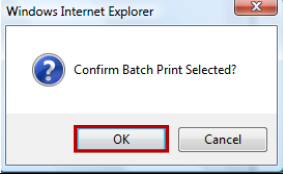
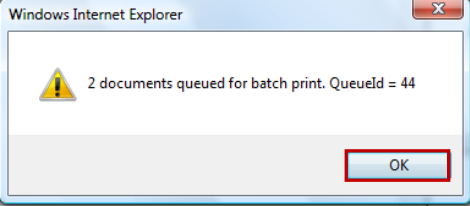

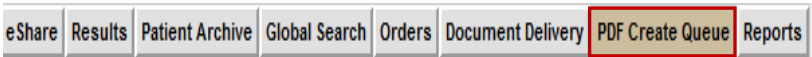
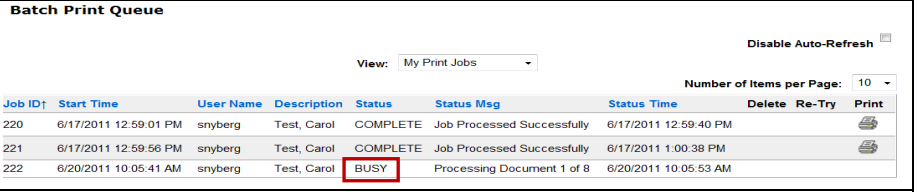
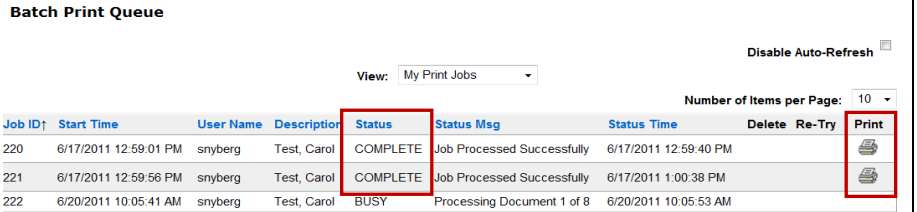

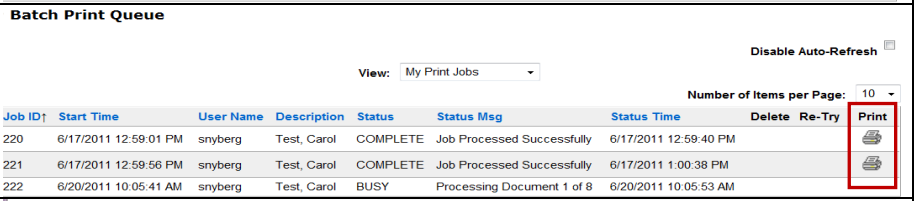

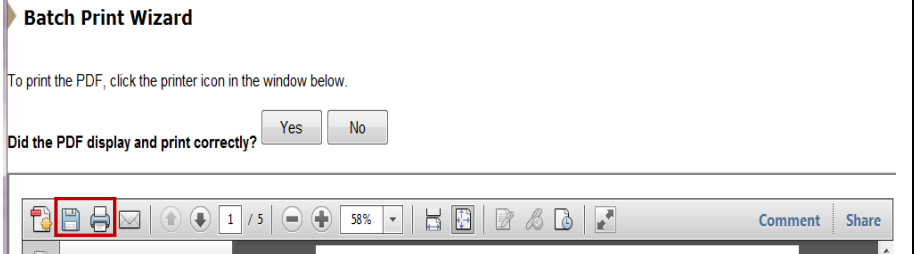
(Medical Staff members and their staff only) User authorization is required to access Global Search.

Step	Action	Screen Shot
1	Select the Global Search tab in the main navigation bar.	
2	Enter the patient's Last Name and Date of Birth OR the last 4 of patient SSN. Select Search to execute query.	<p>Global Search</p> <p>Search:</p> <p>*Last Name: <input type="text"/></p> <p>First Name: <input type="text"/></p> <p>MI: <input type="text"/></p> <p>*Date of Birth: <input type="text"/> mm/dd/yyyy</p> <p>*SSN# (last4): <input type="text"/></p> <p><input type="button" value="Search"/> <input type="button" value="Clear"/></p> <p>* Last Name and DOB or SSN are required</p> <p><small>* You may search on partial strings. Entering "Smith" will return all results starting with "Smith", including "Smithson".</small></p>

<p>3</p>	<p>Select the reason for accessing the Global Search for the patient.</p> <p>When selecting Other, the user is prompted to enter additional information in the open text field below.</p> <p>Select Search to execute query.</p>	
<p>4</p>	<p>The search query returns a list of patients matching the search criteria.</p> <p>Select the appropriate patient and then select the Document Tree icon. </p>	
<p>5</p>	<p>Select the Plus/Minus box to expand folders.</p> <p>To view a single document, click the document name.</p> <p>To view multiple documents, select one or more of the checkboxes. Then select View Selected Documents Icon. </p>	
<p>6</p>	<p>To view all Document Tree options, please see the instructions in Document Tree.</p>	

4.10 PDF Creation - Printing and Saving Multiple Documents

Step	Action	Screen Shot
<p>1</p>	<p>Complete a Patient Archive Search or select the Document Tree icon from the intended patient in the Results Inbox.</p>	


<p>2</p>	<p>Select the intended documents checkbox.</p> <p>Select Batch Print Selected Documents to print all the selected documents in a batch or to save them as a file.</p>																																									
<p>3</p>	<p>Confirm Batch Print Selected by selecting OK. Select Cancel to return to the Document Tree view.</p>																																									
<p>4</p>	<p>A confirmation window will confirm the number of documents queued for batch print.</p> <p>Select Ok to continue.</p>																																									
<p>5</p>	<p>Select Close and return to the Inbox view.</p>																																									
<p>6</p>	<p>Select PDF Create Queue from the menu.</p>																																									
<p>7</p>	<p>*Note: the status in the queue may still be Busy if a large document batch has been requested.</p>	 <table border="1"> <thead> <tr> <th>Job ID†</th> <th>Start Time</th> <th>User Name</th> <th>Description</th> <th>Status</th> <th>Status Msg</th> <th>Status Time</th> <th>Delete</th> <th>Re-Try</th> <th>Print</th> </tr> </thead> <tbody> <tr> <td>220</td> <td>6/17/2011 12:59:01 PM</td> <td>snyberg</td> <td>Test, Carol</td> <td>COMPLETE</td> <td>Job Processed Successfully</td> <td>6/17/2011 12:59:40 PM</td> <td></td> <td></td> <td></td> </tr> <tr> <td>221</td> <td>6/17/2011 12:59:56 PM</td> <td>snyberg</td> <td>Test, Carol</td> <td>COMPLETE</td> <td>Job Processed Successfully</td> <td>6/17/2011 1:00:38 PM</td> <td></td> <td></td> <td></td> </tr> <tr> <td>222</td> <td>6/20/2011 10:05:41 AM</td> <td>snyberg</td> <td>Test, Carol</td> <td>BUSY</td> <td>Processing Document 1 of 8</td> <td>6/20/2011 10:05:53 AM</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Job ID†	Start Time	User Name	Description	Status	Status Msg	Status Time	Delete	Re-Try	Print	220	6/17/2011 12:59:01 PM	snyberg	Test, Carol	COMPLETE	Job Processed Successfully	6/17/2011 12:59:40 PM				221	6/17/2011 12:59:56 PM	snyberg	Test, Carol	COMPLETE	Job Processed Successfully	6/17/2011 1:00:38 PM				222	6/20/2011 10:05:41 AM	snyberg	Test, Carol	BUSY	Processing Document 1 of 8	6/20/2011 10:05:53 AM			
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<p>8</p>	<p>After the PDF file is generated, the Status will change to Complete and the Print icon will be present.</p>	 <table border="1"> <thead> <tr> <th>Job ID†</th> <th>Start Time</th> <th>User Name</th> <th>Description</th> <th>Status</th> <th>Status Msg</th> <th>Status Time</th> <th>Delete</th> <th>Re-Try</th> <th>Print</th> </tr> </thead> <tbody> <tr> <td>220</td> <td>6/17/2011 12:59:01 PM</td> <td>snyberg</td> <td>Test, Carol</td> <td>COMPLETE</td> <td>Job Processed Successfully</td> <td>6/17/2011 12:59:40 PM</td> <td></td> <td></td> <td></td> </tr> <tr> <td>221</td> <td>6/17/2011 12:59:56 PM</td> <td>snyberg</td> <td>Test, Carol</td> <td>COMPLETE</td> <td>Job Processed Successfully</td> <td>6/17/2011 1:00:38 PM</td> <td></td> <td></td> <td></td> </tr> <tr> <td>222</td> <td>6/20/2011 10:05:41 AM</td> <td>snyberg</td> <td>Test, Carol</td> <td>BUSY</td> <td>Processing Document 1 of 8</td> <td>6/20/2011 10:05:53 AM</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Job ID†	Start Time	User Name	Description	Status	Status Msg	Status Time	Delete	Re-Try	Print	220	6/17/2011 12:59:01 PM	snyberg	Test, Carol	COMPLETE	Job Processed Successfully	6/17/2011 12:59:40 PM				221	6/17/2011 12:59:56 PM	snyberg	Test, Carol	COMPLETE	Job Processed Successfully	6/17/2011 1:00:38 PM				222	6/20/2011 10:05:41 AM	snyberg	Test, Carol	BUSY	Processing Document 1 of 8	6/20/2011 10:05:53 AM			
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<p>9</p>	<p>Select the Print icon  on the item row and the PDF will launch in Adobe Acrobat.</p>	 <table border="1"> <thead> <tr> <th>Job ID†</th> <th>Start Time</th> <th>User Name</th> <th>Description</th> <th>Status</th> <th>Status Msg</th> <th>Status Time</th> <th>Delete</th> <th>Re-Try</th> <th>Print</th> </tr> </thead> <tbody> <tr> <td>220</td> <td>6/17/2011 12:59:01 PM</td> <td>snyberg</td> <td>Test, Carol</td> <td>COMPLETE</td> <td>Job Processed Successfully</td> <td>6/17/2011 12:59:40 PM</td> <td></td> <td></td> <td></td> </tr> <tr> <td>221</td> <td>6/17/2011 12:59:56 PM</td> <td>snyberg</td> <td>Test, Carol</td> <td>COMPLETE</td> <td>Job Processed Successfully</td> <td>6/17/2011 1:00:38 PM</td> <td></td> <td></td> <td></td> </tr> <tr> <td>222</td> <td>6/20/2011 10:05:41 AM</td> <td>snyberg</td> <td>Test, Carol</td> <td>BUSY</td> <td>Processing Document 1 of 8</td> <td>6/20/2011 10:05:53 AM</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Job ID†	Start Time	User Name	Description	Status	Status Msg	Status Time	Delete	Re-Try	Print	220	6/17/2011 12:59:01 PM	snyberg	Test, Carol	COMPLETE	Job Processed Successfully	6/17/2011 12:59:40 PM				221	6/17/2011 12:59:56 PM	snyberg	Test, Carol	COMPLETE	Job Processed Successfully	6/17/2011 1:00:38 PM				222	6/20/2011 10:05:41 AM	snyberg	Test, Carol	BUSY	Processing Document 1 of 8	6/20/2011 10:05:53 AM			
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<p>10</p>	<p>The document can be printed or saved using Adobe Acrobat.</p> <p>Select the Save icon  to save the documents.</p> <p>Select Print the documents.</p>																																									

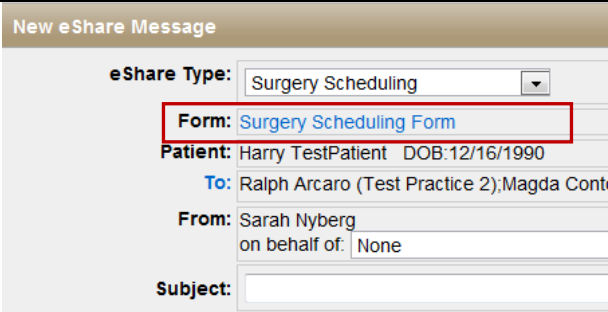
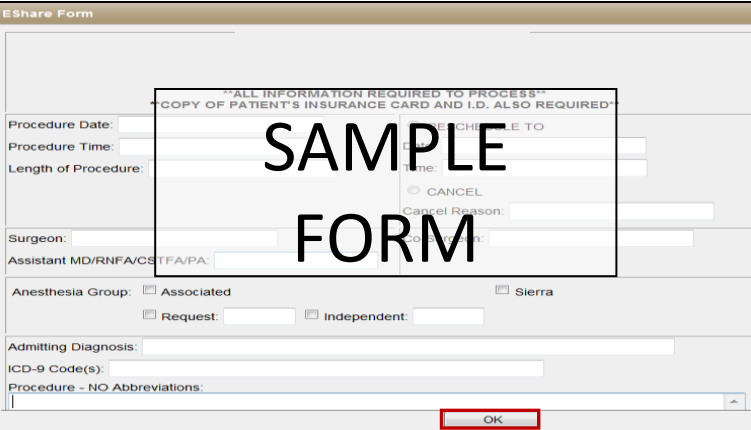
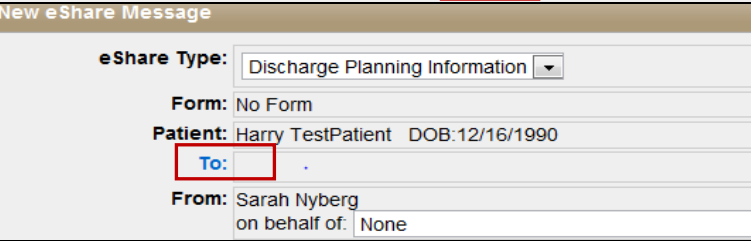
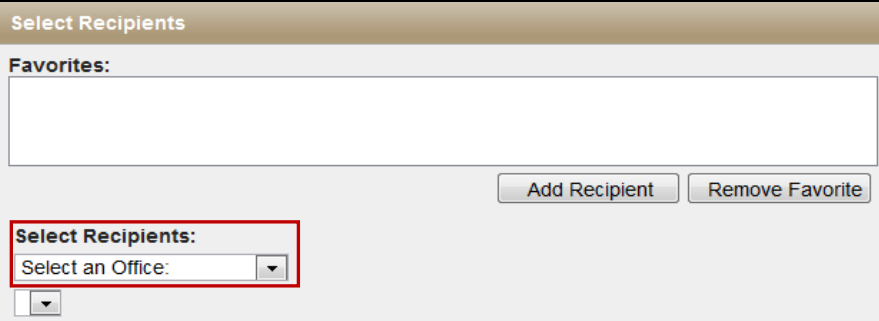
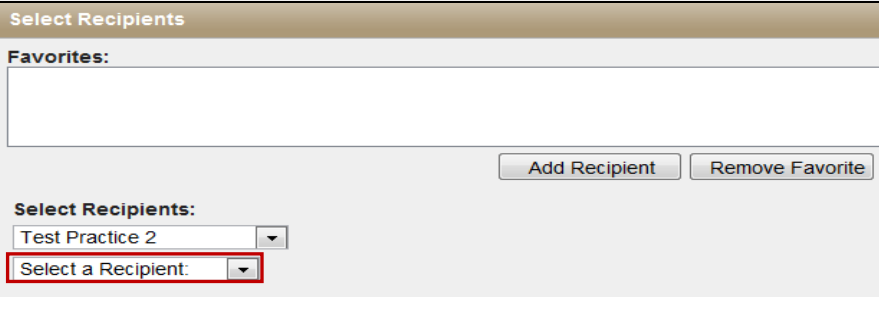
<p>11</p>	<p>Selecting Yes, to “Did the PDF display and print correctly?” the item will remove from the Print PDF queue.</p> <p>Selecting NO to “Did the PDF Display and print correctly?” the item will remain in the PDF print queue.</p>	<p>Batch Print Wizard</p> <p>To print the PDF, click the printer icon in the window below.</p> <p>Did the PDF display and print correctly? Yes No</p> <p>Removes Item from PDF Queue</p> <p>Items remain in PDR Queue</p>
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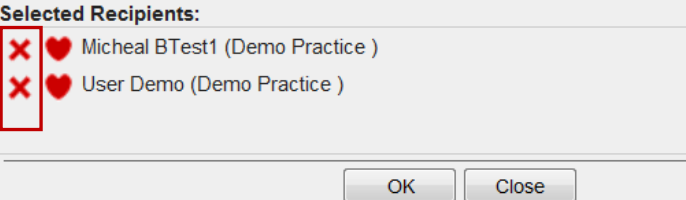

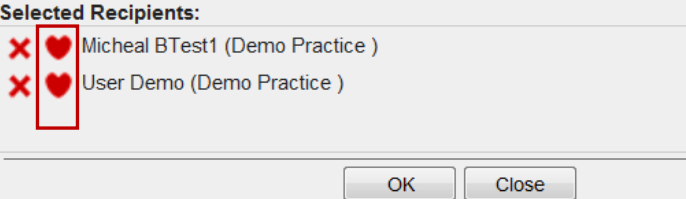
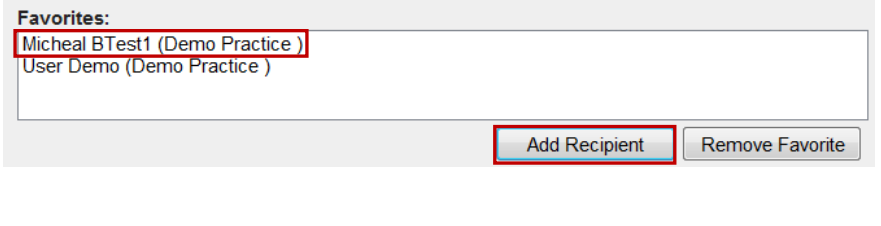
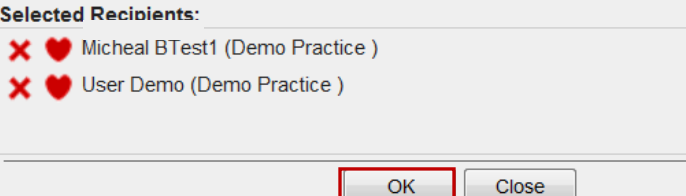
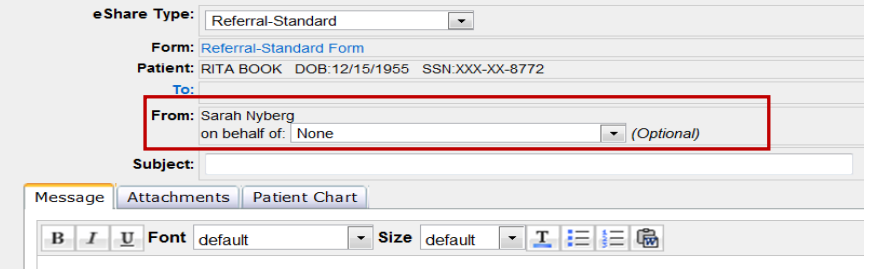
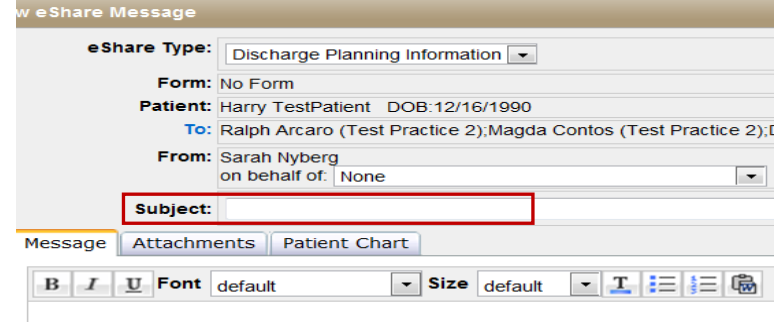
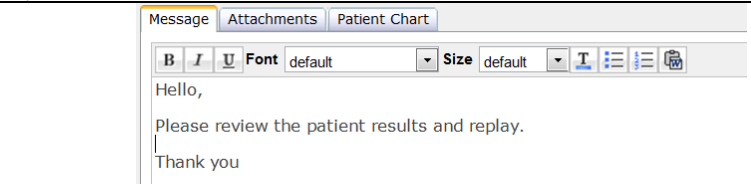

5 eShare

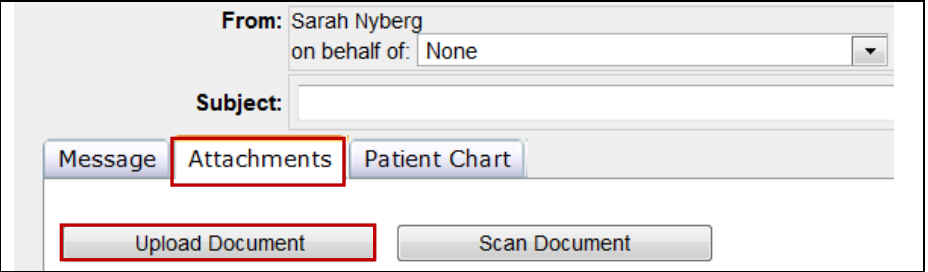
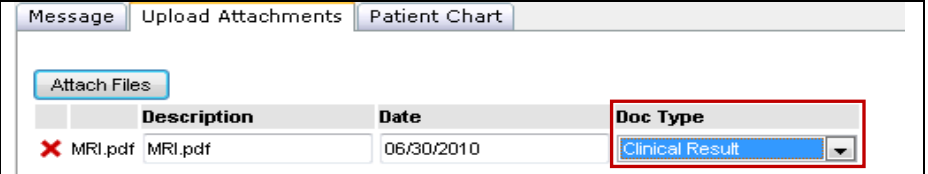
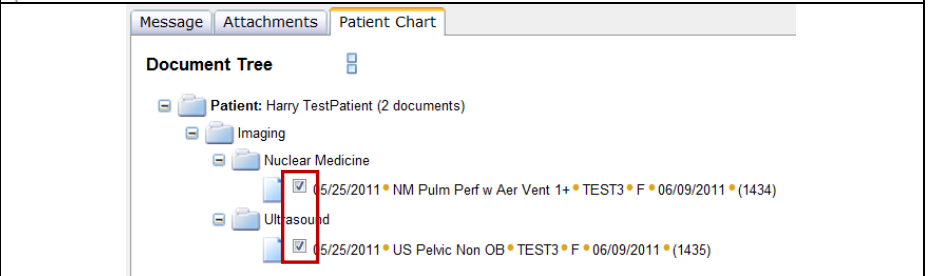
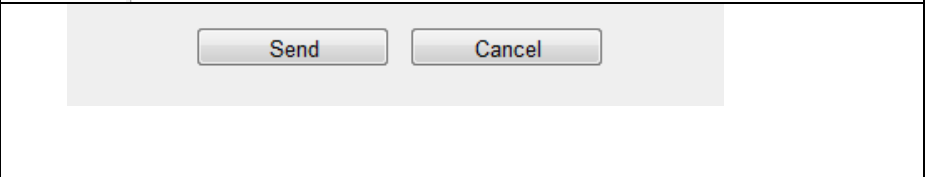
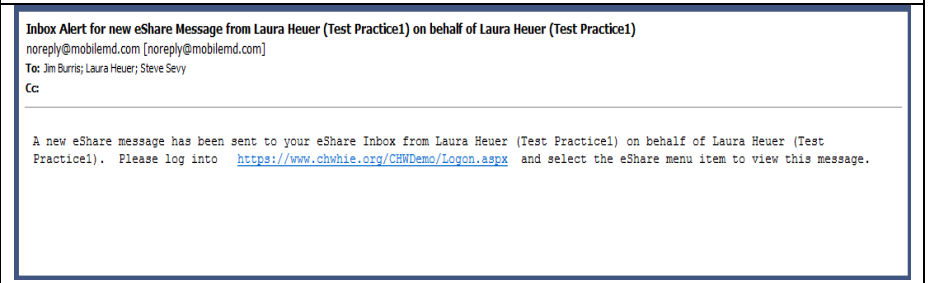
The eShare module allows a configured practice to communicate securely with other configured practices and hospital departments. Send documents, HIE patient records, general correspondence and referrals.

5.1 Create and Send New eShare Message

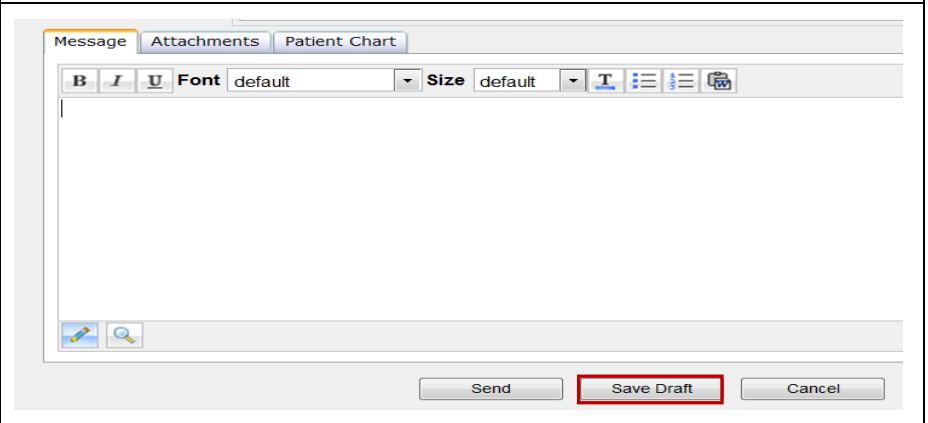
Step	Action	Screen Shot																																
1	<p>Select the eShare icon  to create a New eShare Message.</p> <p>eShare Messages can be initiated from the eShare Inbox, Results Inbox, Patient Archive Search Results and Global Search.</p>	<p>Filters:</p> <p>Patient Last Name Patient First Name Patient DOB Sender Recipient Apply Filters Clear Filters Save Filters</p> <p>Status eShare Type Date range On Behalf Of</p> <p>All Appointment Request Discharge Planning Information General Correspondence</p> <p>Inbox Drafts Sent Archived</p> <p>29 Items</p> <table border="1"> <thead> <tr> <th>Patient</th> <th>From On Behalf Of</th> <th>eShare Type</th> <th>Subject</th> <th>Status</th> <th>Date</th> <th>To</th> <th>Docs</th> </tr> </thead> <tbody> <tr> <td>TEST_PATIENT</td> <td>Patient Test (Public Access)</td> <td>Patient Corresponden...</td> <td>Appointment Request</td> <td>New</td> <td>1/11/2012 7:43 AM</td> <td>Tim Denis (TRAINING...</td> <td>0</td> </tr> <tr> <td>MFHTEST_EHCOERCHANGE</td> <td>Ralph Arcaro (TRAINING PRACTICE)</td> <td>Discharge Planning I...</td> <td>Test the Distro List function</td> <td>New</td> <td>11/22/2011 11:55 AM</td> <td>Ralph Arcaro (TRAINI...</td> <td>1</td> </tr> <tr> <td>MFHTEST_EHCOERCHANGE</td> <td>Ralph Arcaro (TRAINING PRACTICE)</td> <td>Discharge Planning I...</td> <td>Test the Distro List function</td> <td>New</td> <td>11/22/2011 11:55 AM</td> <td>Sarah Nyberg (TRAINI...</td> <td>1</td> </tr> </tbody> </table>	Patient	From On Behalf Of	eShare Type	Subject	Status	Date	To	Docs	TEST_PATIENT	Patient Test (Public Access)	Patient Corresponden...	Appointment Request	New	1/11/2012 7:43 AM	Tim Denis (TRAINING...	0	MFHTEST_EHCOERCHANGE	Ralph Arcaro (TRAINING PRACTICE)	Discharge Planning I...	Test the Distro List function	New	11/22/2011 11:55 AM	Ralph Arcaro (TRAINI...	1	MFHTEST_EHCOERCHANGE	Ralph Arcaro (TRAINING PRACTICE)	Discharge Planning I...	Test the Distro List function	New	11/22/2011 11:55 AM	Sarah Nyberg (TRAINI...	1
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2	<p>A New eShare Message will open and display the patient information automatically.</p>	<p>New eShare Message</p> <p>eShare Type: Select eShare Type:</p> <p>Form: No Form</p> <p>Patient: Harry TestPatient DOB: 12/16/1990</p> <p>To:</p> <p>From: Sarah Nyberg on behalf of: (None) (Optional)</p> <p>Subject:</p> <p>Message Attachments Patient Chart</p> <p>B I U Font default Size default T</p>																																
3	<p>Select the drop down arrow in the eShare Type and select the type of message.</p>	<p>New eShare Message</p> <p>eShare Type: Discharge Planning Information</p> <p>Form: Select eShare Type: Discharge Planning Information</p> <p>Patient: General Correspondence</p> <p>To: Labor and Delivery</p> <p>From: Referral / Consult Request</p> <p>Reservation Request</p> <p>Surgery Scheduling</p> <p>Subject:</p> <p>Message Attachments Patient Chart</p> <p>B I U Font default Size default T</p>																																

<p>4</p>	<p>Select the Form type by clicking on the highlighted form name.</p> <p>*Note: eShare Message Types have Forms associated with the type of email. Some eShare messages may not have any associated forms.</p>	
<p>5</p>	<p>Complete the eShare Form.</p> <p>Select OK to save and continue with the eShare message.</p> <p>*Note: eShare forms are specific to the practice or hospital. Please carefully read the form and complete the open text fields.</p>	
<p>6</p>	<p>Select the highlighted TO: to select one or more recipients for the message.</p>	
<p>7</p>	<p>Select the drop down arrows under Select Recipients – Select an Office.</p> <p>Select the Office from the available options.</p>	
<p>8</p>	<p>Select the drop down arrows under Select Recipients – Select a Recipient.</p> <p>Select the recipients from the available options.</p> <p>Repeat step to add multiple recipients.</p>	

<p>9</p>	<p>Select the red X  to remove the Selected Recipients from the eShare message list.</p>	
<p>10</p>	<p>Select the red heart icon  to add the Selected Recipient to the Favorites.</p>	
<p>11</p>	<p>Add Favorites Select the recipient's name. Select Add Recipient. Select Remove Favorite to remove a saved Favorite.</p>	
<p>12</p>	<p>Select OK to continue to eShare message.</p>	
<p>13</p>	<p>Select the dropdown arrow in the On Behalf Of field (optional). Select the intended 'behalf of' user from the practice personal displayed.</p>	
<p>14</p>	<p>Enter a subject in the Subject line.</p>	
<p>15</p>	<p>Enter a message in the Message body.</p>	
<p>16</p>	<p>Select Attachment tab to add an Attachment to a message. Select Upload Document.</p>	

	<p>Select the document from computer files and then select Open.</p> <p>Repeat steps to attach additional files.</p>	
17	<p>Select a Document Type for the uploaded document.</p>	
18	<p>Attach documents from the Document Tree using the Patient Chart tab.</p> <p>Select the intended item checkbox to add items to eShare message.</p>	
19	<p>Select Send to send the eShare message.</p> <p>Select Cancel to delete the message.</p>	
20	<p>An alert email is sent to the recipient practice or hospital group notifying them of a new message.</p> <p>*All users configured to receive the e-mail will receive it, regardless of the addressee.</p>	

5.2 eShare Message Drafts

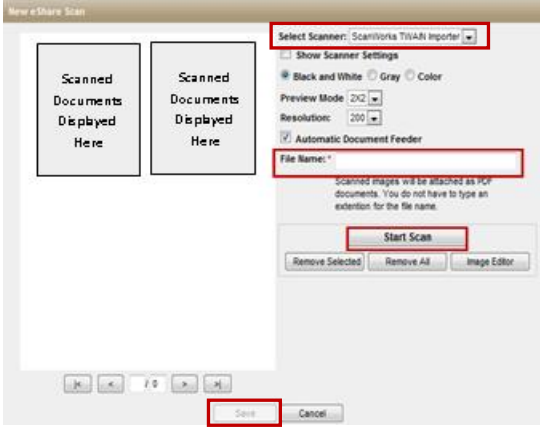
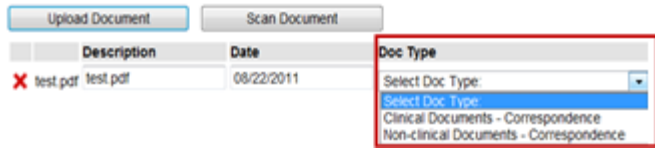
Step	Action	Screen Shot
1	<p>Select Save Draft to save the message.</p>	

<p>2</p>	<p>Messages are saved to the Drafts tab in the eShare Inbox.</p>	
<p>3</p>	<p>Select the highlighted patients name to open, view and complete a saved message. Complete the eShare message.</p>	
<p>4</p>	<p>Select Send to send completed message.</p>	

5.3 eShare Scanning Documents

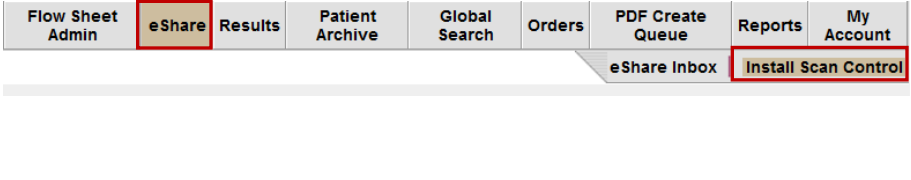
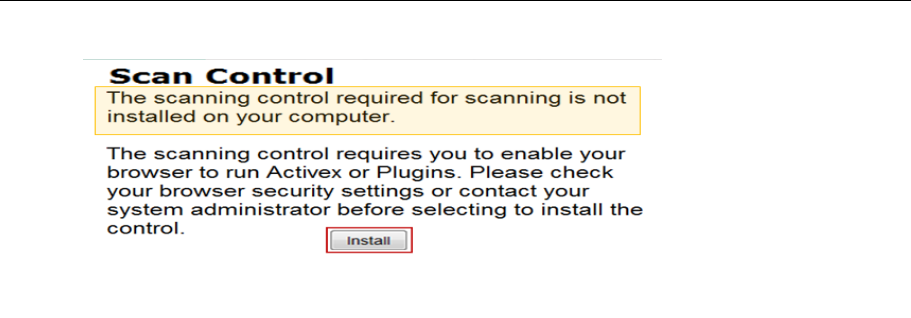
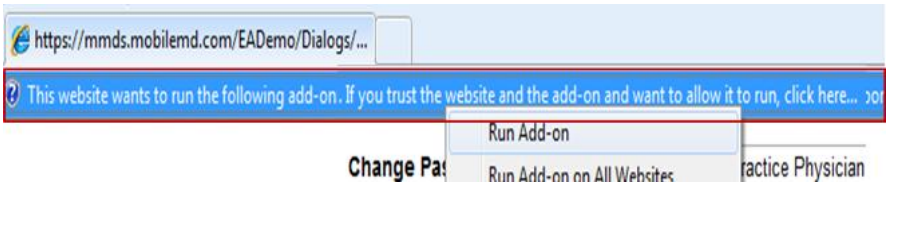
A scanner and scanning software must be installed prior to using the Scan Document feature available in an eShare message.

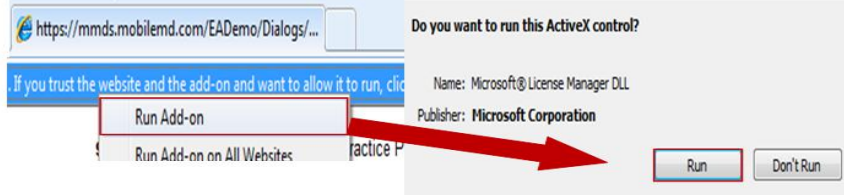
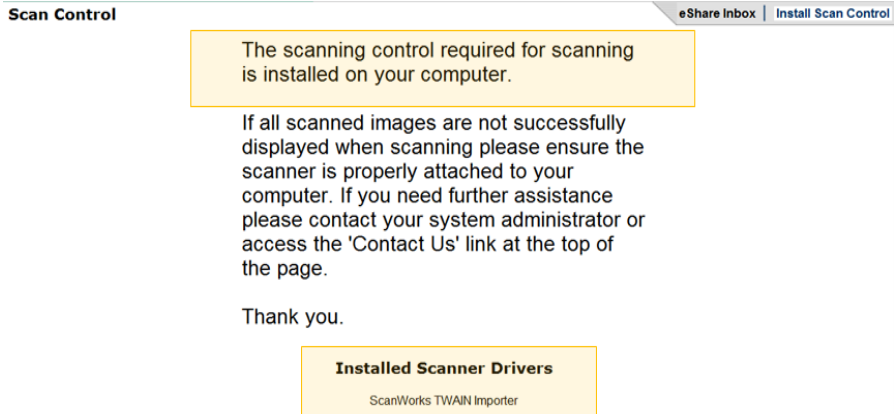
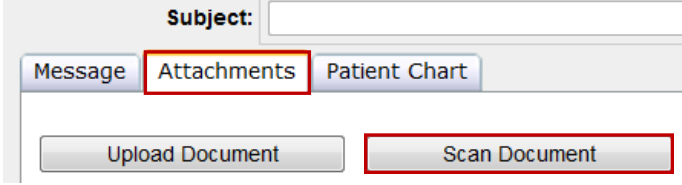
Step	Action	Screen Shot
<p>1</p>	<p>Select the eShare tab in the menu bar.</p>	
<p>2</p>	<p>Select the eShare Message icon to create a new message.</p>	
<p>3</p>	<p>Select the eShare Type.</p>	
<p>4</p>	<p>Select the Attachments tab. Select Scan Document and screen will default to New eShare Scan.</p>	


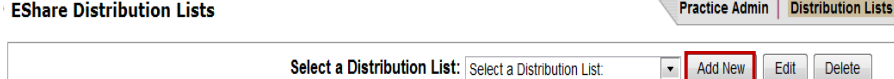
5	<p>If the scanning control has NOT been installed, please see the eShare Scan Installation.</p>
6	<p>Select the Scanner.</p> <p>Enter a File Name into the open text field.</p> <p>Select Start Scan.</p> <p>Scanned documents are displayed on the left side of the New eShare Scan window.</p> <p>Select Save to transfer the scanned documents into the eShare message.</p>
	
7	<p>Select the Doc Type by clicking the dropdown arrow and selecting from the available options displayed.</p> <p>* The Doc Type selection options will depend on the type of eShare message.</p>
	
8	<p>The user can view the scanned document from the patients Document Tree after the eShare message has been sent,</p>
9	<p>Remove Documents Scanned Documents</p> <p>Click the document or select multiple documents by holding the CTRL button while clicking on the item.</p> <p>Select Remove Selected to remove unwanted items from the scanner.</p>
10	<p>Scanner Settings</p> <p>The user can adjust the scanner settings by clicking the box next to Show Scanner Settings. A dialog window will display the settings specific to the scanner.</p>
11	<p>Some common setting options are:</p> <ul style="list-style-type: none"> Change the size of the scan. Change the settings for color document scans. Change the scan Resolution. Select Scan or Cancel to continue.


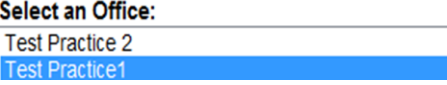
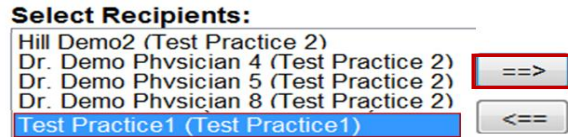
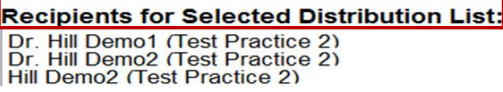
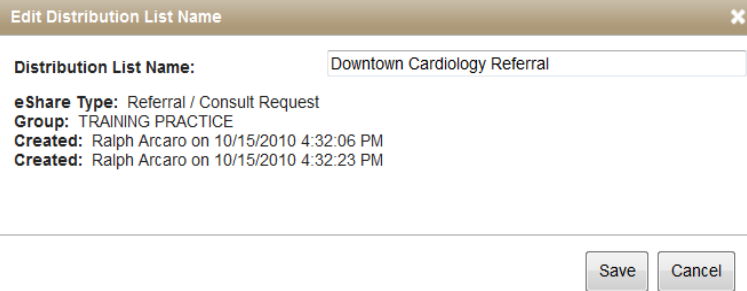
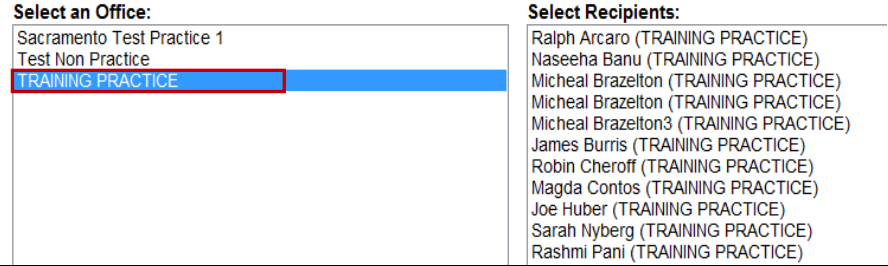
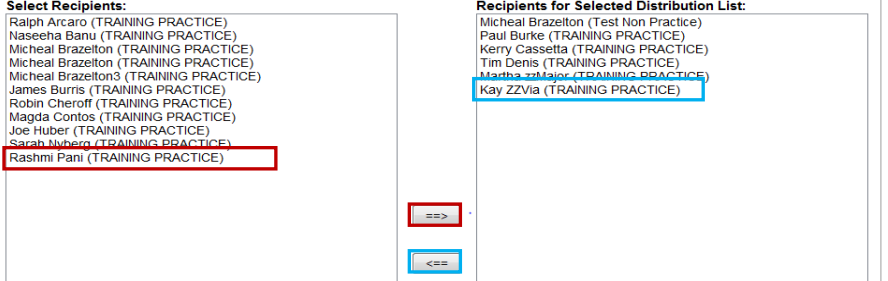
12	<p>Select Image Editor to change the document. Use the menu bar or action buttons to edit the document. Some available editing options are, but not limited to:</p> <ul style="list-style-type: none"> Browse documents - Forward and Back buttons. Rotate the document - Rotate Right or Rotate Left. Zoom in or zoom out - Plus and minus buttons. Crop the image - Ctrl + Alt + C. Undo edits - Ctrl + Z. Save edits - Ctrl + S or Save icon.
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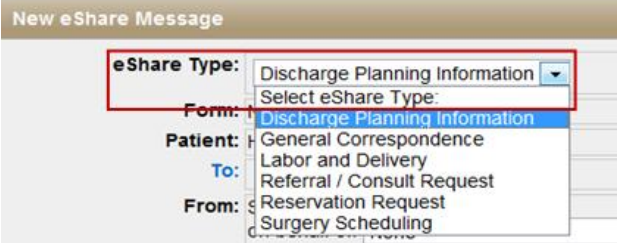
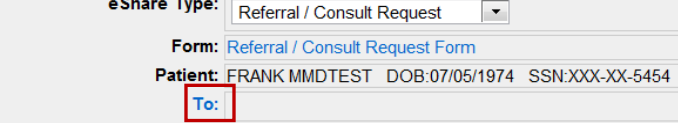
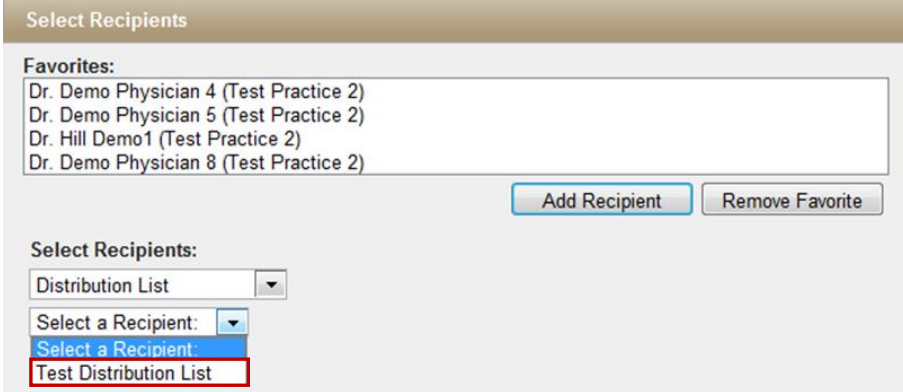
5.4 eShare Scan Installation

Step	Action	Screen Shot
1	<p><u>Scanner Prerequisites</u></p> <p>A scanner with TWAIN drivers must be installed prior to scanning documents into an eShare message. The Scan Control requires administrative rights on the PC for installation. The user must be authorized as an eShare Scan Access user. *Any information entered into the eShare message will be lost.</p>	
2	<p><u>Installing Scan Control</u></p> <p>Select the eShare tab in the menu bar.</p> <p>Select Install Scan Control tab.</p>	 <p>The screenshot shows a menu bar with several tabs: Flow Sheet Admin, eShare, Results, Patient Archive, Global Search, Orders, PDF Create Queue, Reports, and My Account. The 'eShare' tab is highlighted with a red box. Below the menu bar, the 'Install Scan Control' option is also highlighted with a red box.</p>
3	<p>If the scanning control has NOT been installed, the message will state: “The scanning control required for scanning is not installed on your computer.”</p> <p>Select Install to begin installation.</p>	 <p>The screenshot shows a dialog box titled 'Scan Control'. The text inside reads: 'The scanning control required for scanning is not installed on your computer.' Below this, it says: 'The scanning control requires you to enable your browser to run Activex or Plugins. Please check your browser security settings or contact your system administrator before selecting to install the control.' At the bottom of the dialog box, there is an 'Install' button highlighted with a red box.</p>
4	<p>Please follow browser instructions to download and install the scanning control.</p> <p>Click the highlighted dialog bar at the top of the screen to reveal a dropdown menu.</p>	 <p>The screenshot shows a browser security warning dialog box. The text reads: 'This website wants to run the following add-on. If you trust the website and the add-on and want to allow it to run, click here...'. Below the text is a dropdown menu with two options: 'Run Add-on' and 'Run Add-on on All Websites'. The 'Run Add-on' option is highlighted with a red box.</p>


<p>5</p>	<p>Select Run Add-on or click on Install (depending on the browser being used). A Security Warning dialog box will appear. Select Run or Install in the dialog box. Software installation will start.</p>	
<p>6</p>	<p>After the software has been installed, the Scan Control message will state that the scan control has been installed. Verify that the correct scanner is displayed under Installed Scanner Drivers. Please close and restart the browser page.</p>	
<p>7</p>	<p>Installation from an eShare Message Open a new eShare message. Select the eShare messages Type from the dropdown options. Select the Attachments tab. Select Scan Document.</p>	
<p>8</p>	<p>Select Install Now in the dialog box. Select Okay to continue. Skip to step 4 in Installing Scan Control to continue.</p>	

<h2>5.5 eShare Global Distribution List</h2>		
<p>User authorization is required to access eShare Global Distribution list.</p>		
Step	Action	Screen Shot
<p>1</p>	<p>Select the Practice Management tab. Then select Distribution List.</p>	
<p>2</p>	<p>Select Add New to create a new list.</p>	

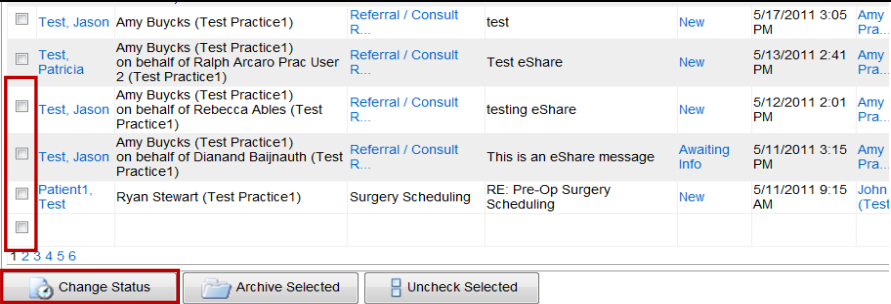
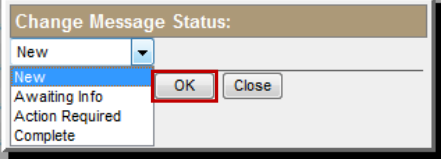
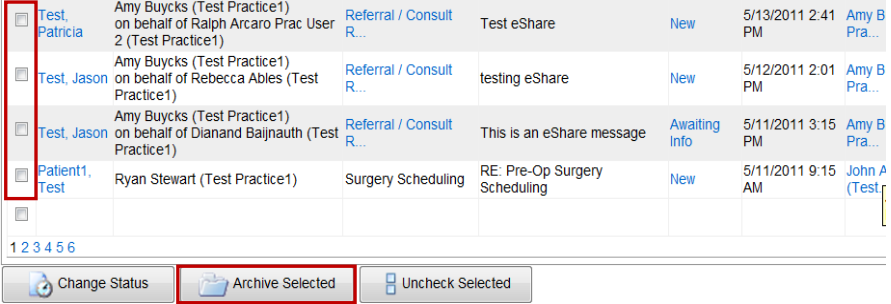
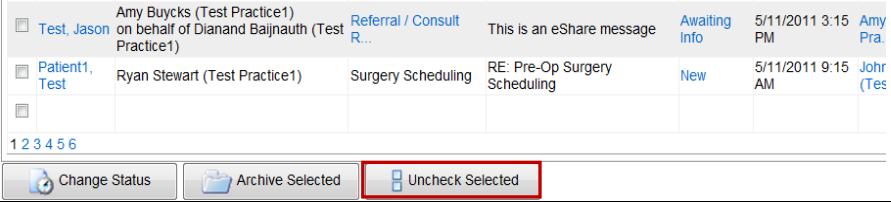




<p>3</p>	<p>Enter a Distribution List Name.</p> <p>Select the eShare Message Type.</p> <p>Select the Group.</p> <p>Select Save to continue.</p>	
<p>4</p>	<p>Select an Office by clicking on the office name.</p>	
<p>5</p>	<p>The available recipients will load in the Select Recipients column.</p> <p>Select the intended recipients.</p> <p>Select Add button to add the person to the distribution list.</p>	
<p>6</p>	<p>Selected recipients are displayed in the Recipients for Selected Distribution List.</p>	
<p>7</p>	<p>The distribution list automatically saves. When all intended individuals have been added, navigate and select the eShare tab to begin or continue a message.</p>	
<p>8</p>	<p>Edit Distribution List Name</p> <p>Select the intended list and then select Edit.</p> <p>Enter a new Distribution Name.</p> <p>Select Save to continue.</p>	
<p>9</p>	<p>Add or Remove Recipients</p> <p>Select the Distribution List.</p> <p>Select the intended office from Select an Office column.</p> <p>The individuals associated with the office will appear in the Select Recipients column.</p>	
<p>10</p>	<p>Add recipients by clicking the name and then selecting the Add button.</p> <p>Remove recipients by clicking the name in the Recipients for Selected Distribution List and the selecting the Remove button.</p>	

11	<p>Using the Distribution list in an eShare Message</p> <p>For users authorized to access eShare, select the eShare icon from the Results Inbox, eShare Inbox, Patient Archive Search Results and Global Search.</p>	
12	<p>Select the drop down arrow in the eShare Type field and select the type of message.</p> <p>Select the highlighted form and <u>carefully read the eShare Form and complete the required open text fields.</u></p>	
13	<p>Select the highlighted TO: to select one or more recipients for the message.</p>	
14	<p>Select the drop down arrow for Select Recipients – Select an Office.</p> <p>Select Distribution List.</p> <p>Select the drop down arrow for Select Recipients – Select a Recipient.</p> <p>Select the Distribution list name from the available options.</p>	
15	<p>Select Ok to continue.</p> <p>Complete the required eShare message fields designated by an asterisk and then select Send.</p>	



5.6 eShare Message Inbox

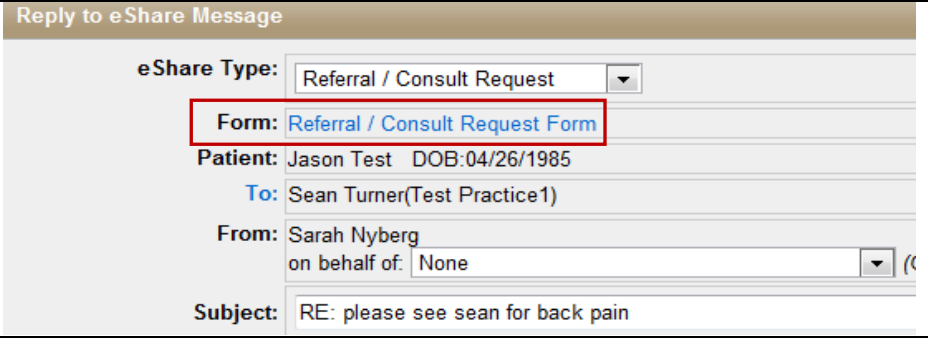
Step	Action	Screen Shot
1	<p>Select the eShare tab in the menu bar.</p>	
2	<p>Select from options available in the drop down lists to refine search results. Use the Ctrl key and click the intended items to select multiple Document Types, Document Categories, Facilities, and Physicians,.</p> <p>Filter options include:</p> <ul style="list-style-type: none"> • Patient First & Last Name - Use this filter to display messages from a specific patient. • Status – Use this filter to display eShare messages with the same status. i.e. Drafts, Sent, etc. • eShare Type - Use this filter to display the eShare message type. i.e. Discharge Planning, Referral, General Correspondence etc. • On Behalf of – Use this filter to find messages send On Behalf of a physician. 	

	<p>eShare Inbox</p> <p>Filters:</p> <p>Patient Last Name ^A Patient First Name ^A Patient DOB Sender ^{AA} Recipient ^{AA}</p> <p>Status ^{AAA} eShare Type ^{AAA}</p> <p>All All New Discharge Planning Information Awaiting Info Referral / Consult Request In Progress Reservation Request</p> <p>^A Begins with ^{AA} Contains ^{AAA} Hold CTRL key down to select multiple options in listboxes</p> <p>Apply Filters Clear Filters Save Filters</p> <p><small>!All times in Pacific Standard Time</small></p>	<p>eShare Inbox Install Scan Control</p>																																								
<p>3</p>	<p>Select the highlighted patient name to view the eShare Message.</p>	<p>Inbox Sent Items Archived Items</p> <p>79 Items</p> <table border="1"> <thead> <tr> <th>Patient</th> <th>From</th> <th>eShare Type</th> <th>Subject</th> <th>Status</th> <th>Date</th> <th>To</th> <th>Docs</th> </tr> </thead> <tbody> <tr> <td>Test, Jason</td> <td>Sean Turner (Test Practice1)</td> <td>Referral / Consult R...</td> <td>please see sean for back pain</td> <td>New</td> <td>6/16/2011 4:43 PM</td> <td>Sean Turner (Test Pr...</td> <td>5</td> </tr> <tr> <td>Test, Paul</td> <td>Sean Turner (Test Practice1)</td> <td>Referral / Consult R...</td> <td>Please see my patient for chest pain</td> <td>New</td> <td>6/16/2011 4:16 PM</td> <td>Sean Turner (Test Pr...</td> <td>4</td> </tr> <tr> <td>Jones, Mary</td> <td>Scott Schaefer (Test Practice 2)</td> <td>Labor and Delivery</td> <td>RE: Prenatal Package</td> <td>New</td> <td>6/14/2011 2:09 PM</td> <td>Scott Schaefer (Test...</td> <td>0</td> </tr> <tr> <td>Test, Jason</td> <td>James Pierce (Test Practice1)</td> <td>Labor and Delivery</td> <td>Prenatal Results</td> <td>New</td> <td>6/14/2011 10:05 AM</td> <td>James Pierce (Test P...</td> <td>0</td> </tr> </tbody> </table>	Patient	From	eShare Type	Subject	Status	Date	To	Docs	Test, Jason	Sean Turner (Test Practice1)	Referral / Consult R...	please see sean for back pain	New	6/16/2011 4:43 PM	Sean Turner (Test Pr...	5	Test, Paul	Sean Turner (Test Practice1)	Referral / Consult R...	Please see my patient for chest pain	New	6/16/2011 4:16 PM	Sean Turner (Test Pr...	4	Jones, Mary	Scott Schaefer (Test Practice 2)	Labor and Delivery	RE: Prenatal Package	New	6/14/2011 2:09 PM	Scott Schaefer (Test...	0	Test, Jason	James Pierce (Test Practice1)	Labor and Delivery	Prenatal Results	New	6/14/2011 10:05 AM	James Pierce (Test P...	0
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Jones, Mary	Scott Schaefer (Test Practice 2)	Labor and Delivery	RE: Prenatal Package	New	6/14/2011 2:09 PM	Scott Schaefer (Test...	0																																			
Test, Jason	James Pierce (Test Practice1)	Labor and Delivery	Prenatal Results	New	6/14/2011 10:05 AM	James Pierce (Test P...	0																																			
<p>4</p>	<p>If the message contains attachments, the documents are displayed in the Attachments section.</p> <p>Select the attachment to open and view.</p>	<p>Diagnosis: Referral / Consult Request Form</p> <p>Forms: Referral / Consult Request Form</p> <p>Message: 1. Laura Heuer (Test Practice1) on behalf of Ryan Stewart (Test Practice1), 12/10/2009 2:09 PM Please review results and reply.</p> <p>Attachments: CBC (3/26/2008); CHEM PANEL - LIVER (3/26/2008); RENAL (BASIC METABOL (3/26/2008);</p>																																								
<p>5</p>	<p>Select Print to print the document.</p> <p>Select Close to close the document.</p>	<p>MCHC:MEAN CORPUSCULA 34.1 31.0-37.0 f F</p> <p>HGB 12.0 11.5-14.5 f F</p> <p>Print Close</p>																																								
<p>6</p>	<p>eShare message options are Reply, Forward, Archive, Print or Close. Select the intended message option to continue.</p> <p>* All the details of the prior message are included with the replied or forwarded message.</p>	<p>From: Sean Turner (Test Practice1)</p> <p>Subject: please see sean for back pain</p> <p>Message: 1. Sean Turner (Test Practice1), 6/16/2011 7:43 PM please see sean for back pain</p> <p>Thanks, Dr. T</p> <p>Attachments: Vanco Peak (9/28/2010); BASIC (9/20/2010); Lipid Panel (9/20/2010); CMP (9/20/2010); CT Abdomen.jpg (6/16/2011);</p> <p>Reply Forward Archive Print Close</p>																																								

<p>7</p>	<p>Change Message Status</p> <p>Select the intended item checkbox.</p> <p>Select Change Status at the bottom of the screen.</p> <p>*Changing the status is optional but may be useful to communicate simple information to the sending or receiving practice.</p>	
<p>8</p>	<p>Select from the available message status options.</p> <p>Select OK to change status.</p> <p>Select Close without changing the message status.</p>	
<p>9</p>	<p>Archive Selected</p> <p>Select the intended item checkbox.</p> <p>Select Archive Selected at the bottom of the screen.</p>	
<p>10</p>	<p>Select Uncheck Selected to unselect any checked items in the inbox.</p>	
<p>11</p>	<p>Reply to an eShare Message by clicking on the Reply icon  located in the patient's item row. The original message will be included in the reply.</p>	
<p>12</p>	<p>Forward an eShare Message by clicking on the Forward icon  located in the patient's item row. The original message will be included in the forwarded message.</p>	
<p>13</p>	<p>Create a new eShare Message by clicking on the eShare icon  located in the patient's item row. A New eShare Message box will open.</p>	
<p>14</p>	<p>View Document Tree for a patient by clicking on the Document Tree icon  located in the patient's item row.</p>	

<p>15</p>	<p>Sent Items</p> <p>Select the Sent Items tab. The inbox displays eShare messages sent.</p> <p>Select the intended item checkbox and then select Archive Selected to move the items into the Archived Items Inbox.</p> <p>Select Uncheck Selected to unselect any checked items in the inbox.</p> <p>*The Status of a sent message cannot be changed.</p>	<table border="1"> <thead> <tr> <th>Patient</th> <th>From</th> <th>eShare Type</th> <th>Subject</th> <th>Status</th> <th>Date</th> </tr> </thead> <tbody> <tr> <td>Test, Jason</td> <td>Sean Turner (Test Practice1)</td> <td>Referral / Consult R...</td> <td>please see sean for back pain</td> <td>Sent</td> <td>6/16/2011 4:43 PM</td> </tr> <tr> <td>Test, Paul</td> <td>Sean Turner (Test Practice1)</td> <td>Referral / Consult R...</td> <td>Please see my patient for chest pain</td> <td>Sent</td> <td>6/16/2011 4:16 PM</td> </tr> <tr> <td>Jones, Mary</td> <td>Scott Schaefer (Test Practice1)</td> <td>Labor and Delivery</td> <td>Prenatal Package</td> <td>Sent</td> <td>6/14/2011 2:08 PM</td> </tr> <tr> <td>Test, Patricia</td> <td>Scott Schaefer (Test Practice1)</td> <td>Labor and Delivery</td> <td>L&D Report</td> <td>Sent</td> <td>6/14/2011 2:02 PM</td> </tr> <tr> <td>Test, Jason</td> <td>James Pierce (Test Practice1)</td> <td>Labor and Delivery</td> <td>Prenatal Results</td> <td>Sent</td> <td>6/14/2011 10:00 AM</td> </tr> <tr> <td>Test, Jason</td> <td>James Pierce (Test Practice1)</td> <td>Labor and Delivery</td> <td>Prenatal Results</td> <td>Sent</td> <td>6/6/2011 2:42 PM</td> </tr> <tr> <td>Test, Jason</td> <td>James Pierce (Test Practice1)</td> <td>Labor and Delivery</td> <td>Test Prenatal Result - Practice 1</td> <td>Sent</td> <td>6/6/2011 1:42 PM</td> </tr> <tr> <td>Test, Jason</td> <td>John Burton (Test Practice1)</td> <td>General Corresponden...</td> <td>eShare test</td> <td>Sent</td> <td>6/3/2011 12:26 PM</td> </tr> <tr> <td>Test, Jason</td> <td>Patricia Haase (Test Practice1)</td> <td>General Corresponden...</td> <td>testing what the email notificatinlooks like</td> <td>Sent</td> <td>6/2/2011 11:57 AM</td> </tr> <tr> <td>Test, Jason</td> <td>Patricia Haase (Test Practice1) on behalf of Dr. Demo Physician 1 (Test Practice1)</td> <td>General Corresponden...</td> <td>testing message</td> <td>Sent</td> <td>6/2/2011 11:12 AM</td> </tr> <tr> <td>Test, Jason</td> <td>James Pierce (Test Practice1)</td> <td>General Corresponden...</td> <td>test</td> <td>Sent</td> <td>5/31/2011 11:20 AM</td> </tr> <tr> <td>Test, Jason</td> <td>Jim Willis (Test Practice1)</td> <td>General Corresponden...</td> <td>i8i8i</td> <td>Sent</td> <td>5/25/2011 2:57 PM</td> </tr> <tr> <td>Test, Jason</td> <td>Amy Buycks (Test Practice1) on behalf of Ralph Arcaro (Test Practice1)</td> <td>Referral / Consult R...</td> <td>testing eShare</td> <td>Sent</td> <td>5/23/2011 10:25 AM</td> </tr> <tr> <td>Test, Jason</td> <td>Amy Buycks (Test Practice1) on behalf of Ira Berkowitz (Test Practice1)</td> <td>Referral / Consult R...</td> <td>test eShare</td> <td>Sent</td> <td>5/19/2011 10:55 AM</td> </tr> <tr> <td>Test, Jason</td> <td>Amy Buycks (Test Practice1)</td> <td>Referral / Consult R...</td> <td>test</td> <td>Sent</td> <td>5/17/2011 3:05 PM</td> </tr> </tbody> </table>	Patient	From	eShare Type	Subject	Status	Date	Test, Jason	Sean Turner (Test Practice1)	Referral / Consult R...	please see sean for back pain	Sent	6/16/2011 4:43 PM	Test, Paul	Sean Turner (Test Practice1)	Referral / Consult R...	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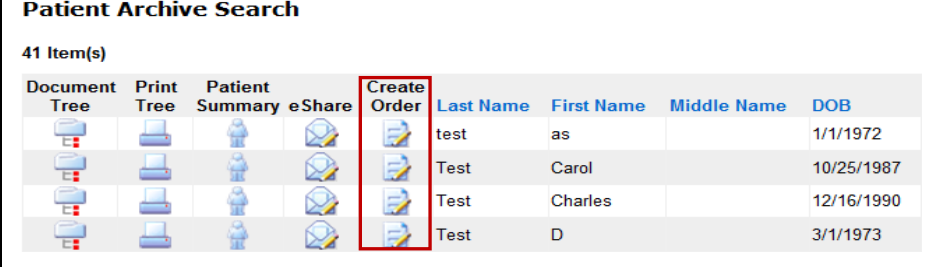
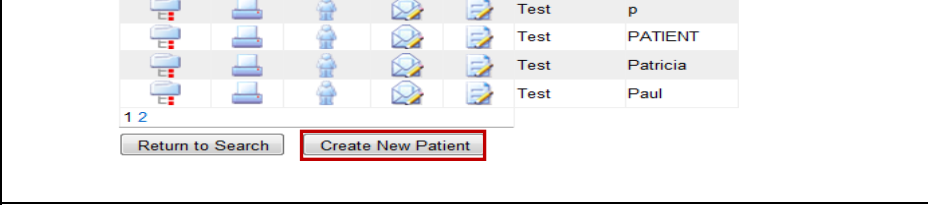
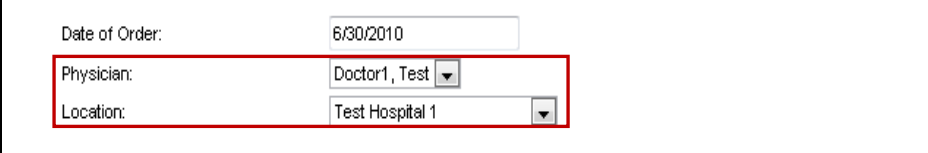
<h3>5.7 Reply and Forward eShare Messages</h3>																																										
Step	Action	Screen Shot																																								
<p>1</p>	<p>Select the Reply icon  to reply to a message.</p> <p>Select the Forward icon  to forward a message.</p>	<table border="1"> <thead> <tr> <th>Patient</th> <th>From</th> <th>eShare Type</th> <th>Subject</th> <th>Status</th> <th>Date</th> <th>Count</th> <th>Icons</th> </tr> </thead> <tbody> <tr> <td>Test, Jason</td> <td>James Pierce (Test Practice1)</td> <td>General Corresponden...</td> <td>test</td> <td>Sent</td> <td>5/31/2011 11:29 AM</td> <td>0</td> <td>Reply, Forward, Print, Delete</td> </tr> <tr> <td>Test, Jason</td> <td>Jim Willis (Test Practice1)</td> <td>General Corresponden...</td> <td>i8i8i</td> <td>Sent</td> <td>5/25/2011 2:57 PM</td> <td>0</td> <td>Reply, Forward, Print, Delete</td> </tr> <tr> <td>Test, Jason</td> <td>Amy Buycks (Test Practice1) on behalf of Ralph Arcaro (Test Practice1)</td> <td>Referral / Consult R...</td> <td>testing eShare</td> <td>Sent</td> <td>5/23/2011 10:25 AM</td> <td>4</td> <td>Reply, Forward, Print, Delete</td> </tr> <tr> <td>Test, Jason</td> <td>Amy Buycks (Test Practice1) on behalf of Ira Berkowitz (Test Practice1)</td> <td>Referral / Consult R...</td> <td>test eShare</td> <td>Sent</td> <td>5/19/2011 10:55 AM</td> <td>3</td> <td>Reply, Forward, Print, Delete</td> </tr> </tbody> </table>	Patient	From	eShare Type	Subject	Status	Date	Count	Icons	Test, Jason	James Pierce (Test Practice1)	General Corresponden...	test	Sent	5/31/2011 11:29 AM	0	Reply, Forward, Print, Delete	Test, Jason	Jim Willis (Test Practice1)	General Corresponden...	i8i8i	Sent	5/25/2011 2:57 PM	0	Reply, Forward, Print, Delete	Test, Jason	Amy Buycks (Test Practice1) on behalf of Ralph Arcaro (Test Practice1)	Referral / Consult R...	testing eShare	Sent	5/23/2011 10:25 AM	4	Reply, Forward, Print, Delete	Test, Jason	Amy Buycks (Test Practice1) on behalf of Ira Berkowitz (Test Practice1)	Referral / Consult R...	test eShare	Sent	5/19/2011 10:55 AM	3	Reply, Forward, Print, Delete
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<p>2</p>	<p>Enter a message into the Message text box.</p>																																									

<p>3</p>	<p>Select the highlighted form name to open, view and edit the form.</p> <p>Complete any updates or add any information needed.</p> <p>Select OK to save and close the eShare form.</p>	 <p>Reply to eShare Message</p> <p>eShare Type: Referral / Consult Request</p> <p>Form: Referral / Consult Request Form</p> <p>Patient: Jason Test DOB:04/26/1985</p> <p>To: Sean Turner(Test Practice1)</p> <p>From: Sarah Nyberg on behalf of: None</p> <p>Subject: RE: please see sean for back pain</p>
<p>4</p>	<p>Select Save Draft to save message. Saved message will be available in the Drafts tab within the eShare Inbox.</p> <p>Select Send to send and close the message.</p> <p>Select Cancel to close the message without saving or sending.</p>	
<p>5</p>	<p>An alert email is sent to the recipients email notifying them of a new message.</p> <p>*Only users configured to receive the e-mail will receive it.</p>	

6 Outpatient Orders

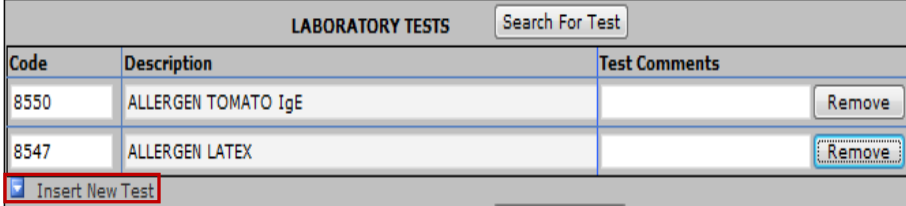
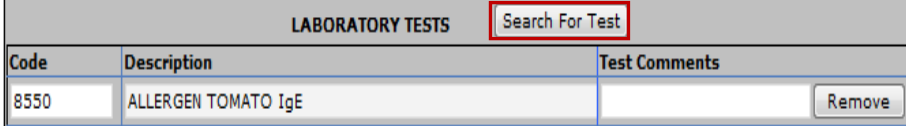
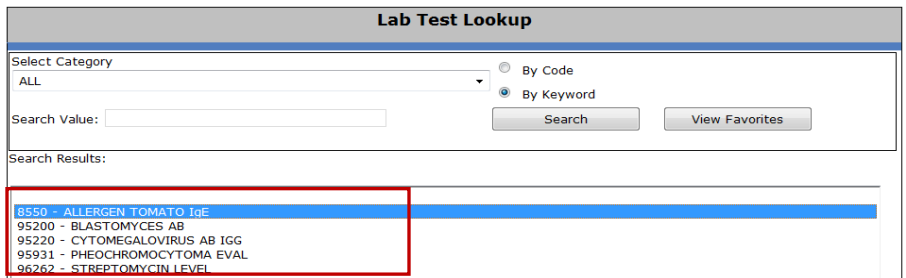
The purpose of the Orders module is to provide practices with an electronic means to submit outpatient orders to specific departments within the hospital, and to provide a mechanism by which to provide updates regarding the submitted orders.

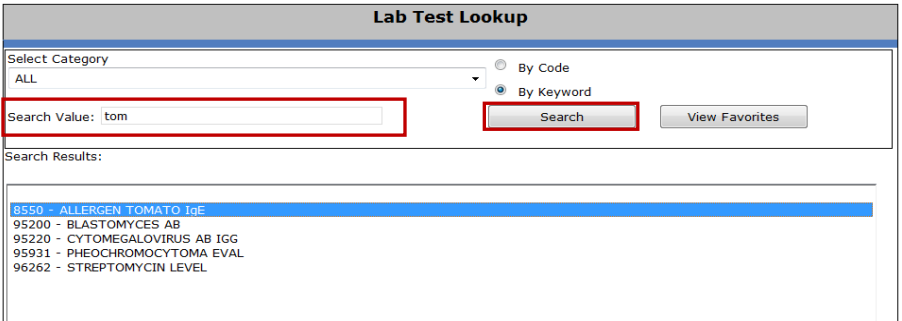
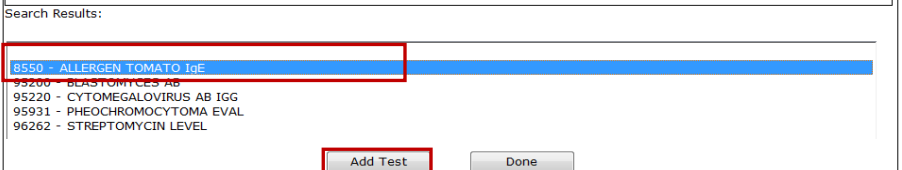
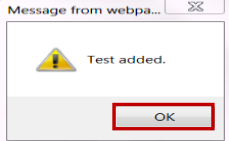

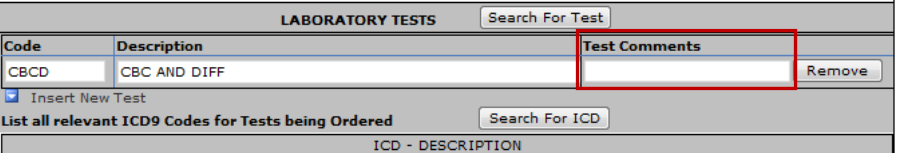
6.1 Create Order

Step	Action	Screen Shot																																													
<p>1</p>	<p>Perform a Patient Archive Search for an existing patient.</p> <p>Select the Create Order icon.</p>	 <p>Patient Archive Search</p> <p>41 Item(s)</p> <table border="1"> <thead> <tr> <th>Document Tree</th> <th>Print Tree</th> <th>Patient Summary</th> <th>eShare</th> <th>Create Order</th> <th>Last Name</th> <th>First Name</th> <th>Middle Name</th> <th>DOB</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td>test</td> <td>as</td> <td></td> <td>1/1/1972</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Test</td> <td>Carol</td> <td></td> <td>10/25/1987</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Test</td> <td>Charles</td> <td></td> <td>12/16/1990</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Test</td> <td>D</td> <td></td> <td>3/1/1973</td> </tr> </tbody> </table>	Document Tree	Print Tree	Patient Summary	eShare	Create Order	Last Name	First Name	Middle Name	DOB						test	as		1/1/1972						Test	Carol		10/25/1987						Test	Charles		12/16/1990						Test	D		3/1/1973
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					Test	Charles		12/16/1990																																							
					Test	D		3/1/1973																																							
<p>2</p>	<p>If submitting an Order for a <u>new patient</u>, click on Create New Patient and follow instructions in Create New Patient.</p>	 <p>Test p</p> <p>Test PATIENT</p> <p>Test Patricia</p> <p>Test Paul</p> <p>1 2</p> <p>Return to Search Create New Patient</p>																																													
<p>3</p>	<p>Select the Physician submitting the Order and the Location of the Order to be filled.</p>	 <p>Date of Order: 6/30/2010</p> <p>Physician: Doctor1, Test</p> <p>Location: Test Hospital 1</p>																																													

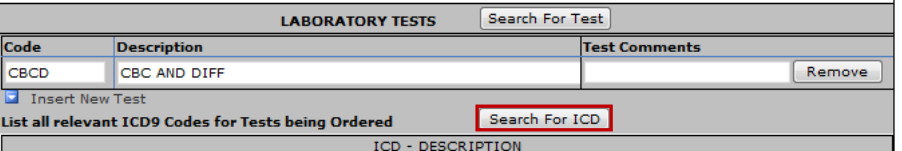
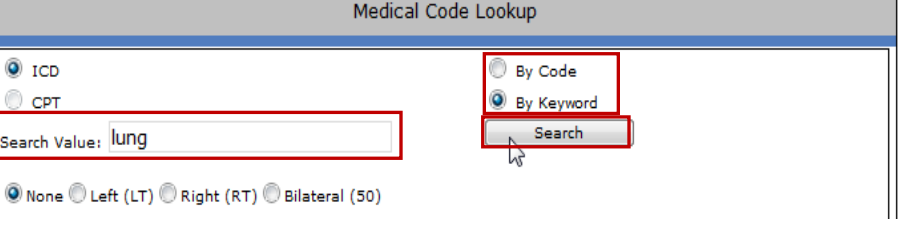
4	<p>A list of available Orders for the selected location will display.</p> <p>Select the checkbox for the Order and then click Create Order.</p> <p>*Multiple Order forms can be selected. A pop-up window will display each individual form selected.</p>	<p>Create Patient Orders</p> <p>Patient Search Clear All</p> <p>Patient Information Patient Name: patient1 , Test DOB: 01/01/1960 Gender: Postal Code: SSN: XXX-XX-6789</p> <p>Order Information</p> <p>Click HERE to see Mercy Imaging Center Locations and Modalities by Location</p> <p>Date of Order: <input type="text" value="6/30/2010"/> Physician: <input type="text" value="Doctor1 , Test"/> Location: <input type="text" value="Test Hospital 1"/></p> <p>Test 1 Lab <input checked="" type="checkbox"/></p> <p>Test 1 - Radiology <input checked="" type="checkbox"/></p> <p>Test 1 - Outpatient Rehabilitation <input type="checkbox"/></p> <p><input checked="" type="button" value="Create Order Form(s)"/></p>
5	<p>* Order Forms are specific to the practice or hospital.</p> <p>Please carefully read the form and complete all required fields defined by an asterisk.</p>	
6	<p>An Order can be originated by performing a Patient Archive Search or from the Orders tab→Create Order→Patient Search. The preferred method is to start with Patient Archive.</p>	

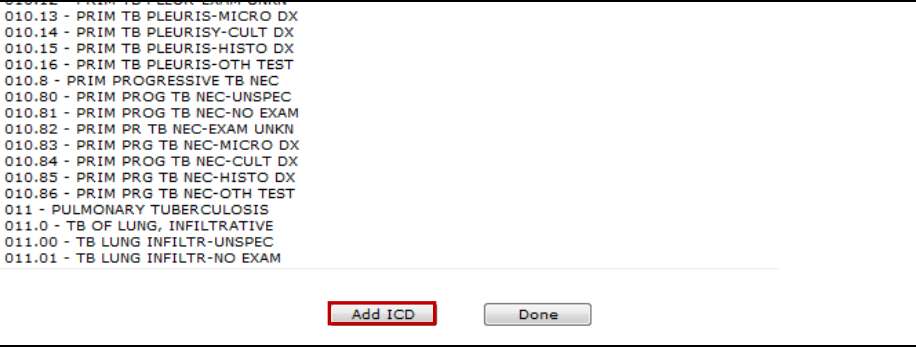
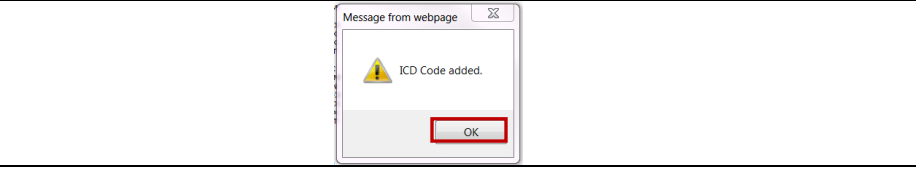

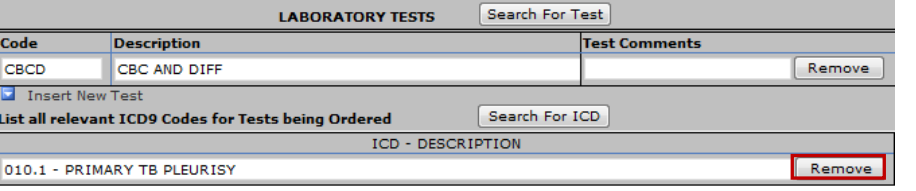
6.2 Test Codes – Lab Orders

Step	Action	Screen Shot									
1	<p>Select Insert New Test to enter a known test code.</p> <p>Enter the correct test code.</p> <p>Select the Tab key on the computer keyboard. The description will auto fill.</p> <p>Repeat steps to add multiple test codes.</p>	 <p>LABORATORY TESTS Search For Test</p> <table border="1"> <thead> <tr> <th>Code</th> <th>Description</th> <th>Test Comments</th> </tr> </thead> <tbody> <tr> <td>8550</td> <td>ALLERGEN TOMATO IgE</td> <td><input type="button" value="Remove"/></td> </tr> <tr> <td>8547</td> <td>ALLERGEN LATEX</td> <td><input type="button" value="Remove"/></td> </tr> </tbody> </table> <p><input checked="" type="button" value="Insert New Test"/></p>	Code	Description	Test Comments	8550	ALLERGEN TOMATO IgE	<input type="button" value="Remove"/>	8547	ALLERGEN LATEX	<input type="button" value="Remove"/>
Code	Description	Test Comments									
8550	ALLERGEN TOMATO IgE	<input type="button" value="Remove"/>									
8547	ALLERGEN LATEX	<input type="button" value="Remove"/>									
2	<p>Search for Tests</p> <p>Select Search for Test.</p>	 <p>LABORATORY TESTS Search For Test</p> <table border="1"> <thead> <tr> <th>Code</th> <th>Description</th> <th>Test Comments</th> </tr> </thead> <tbody> <tr> <td>8550</td> <td>ALLERGEN TOMATO IgE</td> <td><input type="button" value="Remove"/></td> </tr> </tbody> </table>	Code	Description	Test Comments	8550	ALLERGEN TOMATO IgE	<input type="button" value="Remove"/>			
Code	Description	Test Comments									
8550	ALLERGEN TOMATO IgE	<input type="button" value="Remove"/>									
3	<p>The top 25 frequently ordered tests are displayed in Lab Test Lookup or select View Favorites.</p> <p>Highlight the test and then select Add Test.</p>	 <p>Lab Test Lookup</p> <p>Select Category: ALL By Code <input checked="" type="radio"/> By Keyword</p> <p>Search Value: <input type="text"/> <input type="button" value="Search"/> <input type="button" value="View Favorites"/></p> <p>Search Results:</p> <table border="1"> <tbody> <tr> <td>8550 - ALLERGEN TOMATO IgE</td> </tr> <tr> <td>95200 - BLASTOMYCES AB</td> </tr> <tr> <td>95220 - CYTOMEGALOVIRUS AB IGG</td> </tr> <tr> <td>95931 - PHEOCHROMOCYTOMA EVAL</td> </tr> <tr> <td>96262 - STREPTOMYCIN LEVEL</td> </tr> </tbody> </table>	8550 - ALLERGEN TOMATO IgE	95200 - BLASTOMYCES AB	95220 - CYTOMEGALOVIRUS AB IGG	95931 - PHEOCHROMOCYTOMA EVAL	96262 - STREPTOMYCIN LEVEL				
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95200 - BLASTOMYCES AB											
95220 - CYTOMEGALOVIRUS AB IGG											
95931 - PHEOCHROMOCYTOMA EVAL											
96262 - STREPTOMYCIN LEVEL											
4	<p>Select the method of search; By Code or By Keyword.</p>										

	<p>In Search Value field, enter full or partial word or enter test code name.</p> <p>Select Search to execute query.</p>	
5	<p>Select the intended test name from the Search Results.</p> <p>Select Add Test.</p>	
6	<p>A pop-up displays Test added.</p> <p>Select OK to continue.</p>	
7	<p>Select Done to close the Lab Test Lookup box.</p>	
8	<p>Enter Test Comments (if required).</p> <p>Select Remove to remove tests.</p>	

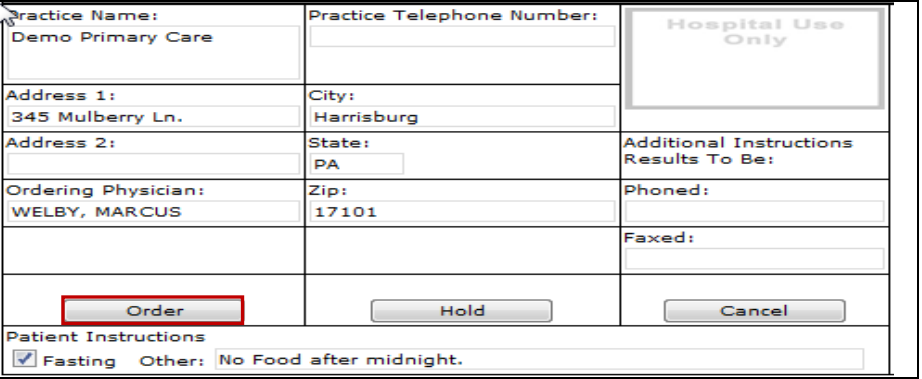
6.3 ICD Codes

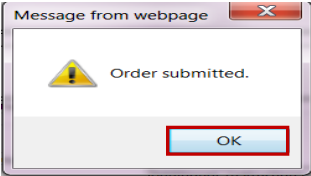
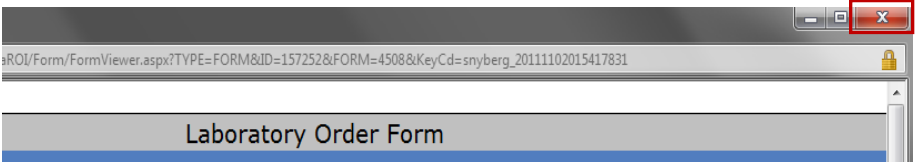
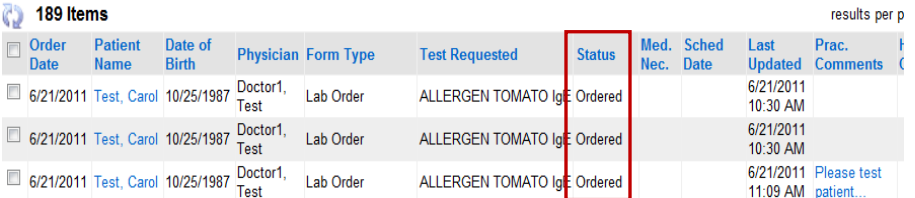
Step	Action	Screen Shot
1	<p>Select Search for ICD to enter ICD9 codes.</p>	
2	<p>Select the method of search; ICD, CPT, By Code or By Keyword.</p> <p>Enter the search value.</p> <p>Select Search to execute query.</p>	

3	<p>Select the intended ICD code name in Search Results.</p> <p>Select Add ICD.</p> <p>Repeat the above steps to add multiple ICD's.</p> <p>*CPT codes - only apply to procedures ordered on non-Lab Orders.</p>	
4	<p>A pop up confirms the ICD Code has been added.</p> <p>Select OK to continue.</p>	
5	<p>Select Done to close the Medical Code Lookup box.</p>	
6	<p>Selected ICD9 Codes are display.</p> <p>Select Remove to remove any incorrect ICD 9 codes.</p>	

6.4 Submit Laboratory Order

Please Note: Facilities and hospitals have multiple types of Order forms. This section provides instructions for submitting a patient Laboratory Order.

Step	Action	Screen Shot
Facilities requiring an eSignature, please skip down to step 5.		
1	<p>Select Order to send the order for processing.</p> <p>Select Hold to save an order or to place an existing order on Hold.</p> <p>Select Cancel to Cancel an order without saving.</p>	

2	<p>If the Test and ICD code do not pass Medical Necessity, please see Medical Necessity Checking.</p> <p>A pop-up confirms the order is submitted.</p> <p>Select OK to continue.</p>	
3	<p>Select the red X in the upper right corner of the form to close the window.</p>	
4	<p>The Order Status is changed to Ordered in the Process Orders Inbox.</p>	
<p><u>The following instructions are for Facilities requiring an eSignature. If the location does not require an eSignature, please skip down to 6.8 Place Order On hold</u></p>		
5	<p>Select Sign and Submit to submit an Order.</p> <p>If the Test and ICD code do not pass Medical Necessity, please see Medical Necessity Checking.</p>	<p>Practice Comments: limited to 300 char</p> <p>For STAT orders, please call facility; please <i>do not submit STAT orders with this form</i></p> <p>Sign & Submit Hold Cancel</p>
6	<p>The Ordering Physician must enter the eSignature password (configured during setup).</p> <p>Select Sign to continue.</p>	<p>Enter eSignature Password: [password field]</p> <p>Sign Cancel</p>
7	<p>Select Cancel to cancel an Order.</p>	<p>For STAT orders, please call facility; please <i>do not submit STAT orders with this form</i></p> <p>Sign & Submit Hold Cancel</p> <p>Electronically signed by Doctor1,Test (Lic# DEMO0001) on 6/30/2010 7:18:47 AM</p>

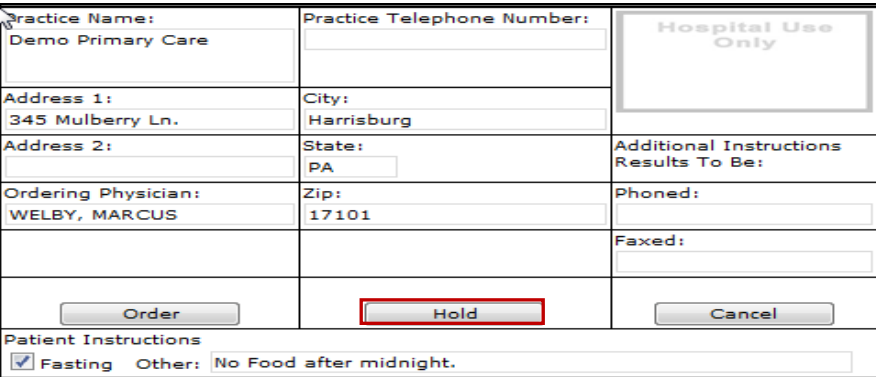
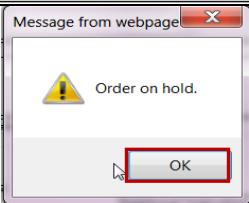
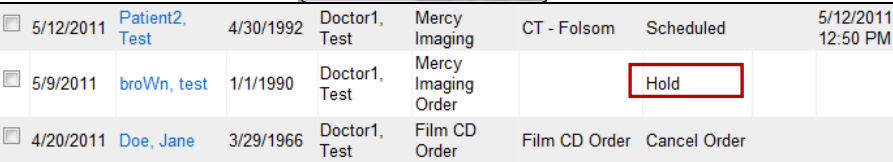
6.5 Medical Necessity Checking

Step	Action	Screen Shot
1	<p>When a patient's insurance is Medicare/Medicaid, Medical Necessity Checking is performed at the time the Order is Signed & Submitted.</p>	

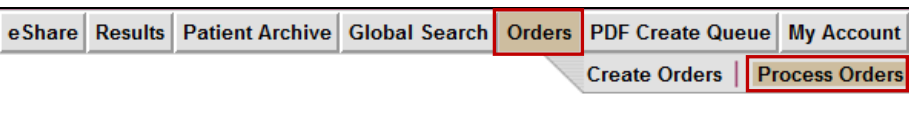
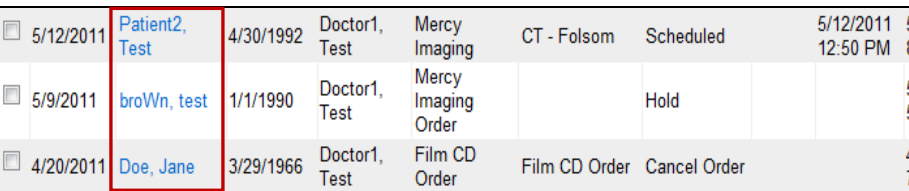
2	Select Sign and Submit to Submit an Order.	<p style="text-align: center;">For STAT orders, please call facility; please do not submit STAT orders with this form</p> <p style="text-align: center;"> <input type="button" value="Sign & Submit"/> <input type="button" value="Hold"/> <input type="button" value="Cancel"/> </p>										
3	If the Test listed on the Order form does not correspond with the ICD code and is not listed as a covered procedure, the procedure is denied as not Medically Necessary.											
4	An <u>Advance Beneficiary Notice of Noncoverage (ABN)</u> form will generate.											
5	Select Display ABN to view the ABN Form.	<p style="text-align: center;">Medical Necessity Check Status</p> <p>Status: Restricted</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Test Code</th> <th>CPT Code</th> <th>ICD Code</th> <th>Status</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>CBC</td> <td>87088</td> <td>798.1</td> <td>2</td> <td>Restricted - NCD</td> </tr> </tbody> </table> <p style="text-align: center;"> <input type="button" value="Display ABN"/> <input type="button" value="Return to Form"/> <input type="button" value="Submit"/> </p>	Test Code	CPT Code	ICD Code	Status	Description	CBC	87088	798.1	2	Restricted - NCD
Test Code	CPT Code	ICD Code	Status	Description								
CBC	87088	798.1	2	Restricted - NCD								
6	<u>Print and provide the form to the patient.</u>	<p style="text-align: center;">ADVANCE BENEFICIARY NOTICE OF NONCOVERAGE (ABN)</p> <p>NOTE: If Medicare doesn't pay for (D) Laboratory test below, you may have to pay. Medicare does not pay for everything, even some care that you or your health care provider have good reason to think you need. We expect Medicare may not pay for the (D) Laboratory test below.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>(D) Laboratory test</th> <th>(E) Reason Medicare May Not Pay:</th> <th>(F) Estimated Cost:</th> </tr> </thead> <tbody> <tr> <td>CBC w/DIFF</td> <td>Restricted - NCD</td> <td>\$100.00 - 150.00</td> </tr> </tbody> </table> <p>WHAT YOU NEED TO DO NOW:</p> <ul style="list-style-type: none"> • Read this notice, so you can make an informed decision about your care. • Ask us any questions that you may have after you finish reading. • Choose an option below about whether to receive the (D) Laboratory test listed above. <p>Note: If you choose Option 1 or 2, we may help you to use any other insurance that you might have, but Medicare cannot require us to do this.</p>	(D) Laboratory test	(E) Reason Medicare May Not Pay:	(F) Estimated Cost:	CBC w/DIFF	Restricted - NCD	\$100.00 - 150.00				
(D) Laboratory test	(E) Reason Medicare May Not Pay:	(F) Estimated Cost:										
CBC w/DIFF	Restricted - NCD	\$100.00 - 150.00										
7	<u>The patient is required to complete the form and provide a signature to authorize the uncovered test.</u>	<div style="border: 2px solid red; padding: 5px;"> <p>(G) OPTIONS: Check only one box. We cannot choose a box for you.</p> <p><input type="checkbox"/> OPTION 1. I want the (D) Laboratory test listed above. You may ask to be paid now, but I also want Medicare billed for an official decision on payment, which is sent to me on a Medicare Summary Notice (MSN). I understand that if Medicare doesn't pay, I am responsible for payment, but I can appeal to Medicare by following the directions on the MSN. If Medicare does pay, you will refund any payments I made to you, less co-pays or deductibles.</p> <p><input type="checkbox"/> OPTION 2. I want the (D) Laboratory test listed above, but I do not bill Medicare. I may ask to be paid now as I am responsible for payment. I cannot appeal if Medicare is not billed.</p> <p><input type="checkbox"/> OPTION 3. I don't want the (D) Laboratory test listed above. I understand with this choice I am not responsible for payment, and I cannot appeal to see if Medicare would pay.</p> <p>(H) Additional Information:</p> </div> <p>This notice gives our opinion, not an official Medicare decision. If you have other questions on this notice or Medicare billing, call 1-800-MEDICARE (1-800-633-4227/TTY: 1-877-486-2048). Signing below means that you have received and understand this notice. You also receive a copy.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 70%;">(I) Signature</td> <td>(J) Date</td> </tr> </table>	(I) Signature	(J) Date								
(I) Signature	(J) Date											
8	Select Return to Form to return to the Order form. Select the Submit button to continue with the order.	<p style="text-align: center;">Medical Necessity Check Status</p> <p>Status: Restricted</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Test Code</th> <th>CPT Code</th> <th>ICD Code</th> <th>Status</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>CBC</td> <td>87088</td> <td>798.1</td> <td>2</td> <td>Restricted - NCD</td> </tr> </tbody> </table> <p style="text-align: center;"> <input type="button" value="Display ABN"/> <input type="button" value="Return to Form"/> <input type="button" value="Submit"/> </p>	Test Code	CPT Code	ICD Code	Status	Description	CBC	87088	798.1	2	Restricted - NCD
Test Code	CPT Code	ICD Code	Status	Description								
CBC	87088	798.1	2	Restricted - NCD								

9	A pop-up confirms the order is submitted. Select OK to continue.	
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6.6 Place Order on Hold

Step	Action	Screen Shot																											
1	Select Hold to save an incomplete Order to finish later. The order will be saved to the Process Order Inbox until it has been ordered or canceled.																												
2	A Pop-up confirms that the order is on hold. Select OK to continue.																												
3	The Order Status is changed to Hold in the Process Orders Inbox.	 <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td><input type="checkbox"/></td> <td>5/12/2011</td> <td>Patient2, Test</td> <td>4/30/1992</td> <td>Doctor1, Test</td> <td>Mercy Imaging</td> <td>CT - Folsom</td> <td>Scheduled</td> <td>5/12/2011 12:50 PM</td> </tr> <tr> <td><input type="checkbox"/></td> <td>5/9/2011</td> <td>broWn, test</td> <td>1/1/1990</td> <td>Doctor1, Test</td> <td>Mercy Imaging Order</td> <td></td> <td>Hold</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>4/20/2011</td> <td>Doe, Jane</td> <td>3/29/1966</td> <td>Doctor1, Test</td> <td>Film CD Order</td> <td>Film CD Order</td> <td>Cancel Order</td> <td></td> </tr> </table>	<input type="checkbox"/>	5/12/2011	Patient2, Test	4/30/1992	Doctor1, Test	Mercy Imaging	CT - Folsom	Scheduled	5/12/2011 12:50 PM	<input type="checkbox"/>	5/9/2011	broWn, test	1/1/1990	Doctor1, Test	Mercy Imaging Order		Hold		<input type="checkbox"/>	4/20/2011	Doe, Jane	3/29/1966	Doctor1, Test	Film CD Order	Film CD Order	Cancel Order	
<input type="checkbox"/>	5/12/2011	Patient2, Test	4/30/1992	Doctor1, Test	Mercy Imaging	CT - Folsom	Scheduled	5/12/2011 12:50 PM																					
<input type="checkbox"/>	5/9/2011	broWn, test	1/1/1990	Doctor1, Test	Mercy Imaging Order		Hold																						
<input type="checkbox"/>	4/20/2011	Doe, Jane	3/29/1966	Doctor1, Test	Film CD Order	Film CD Order	Cancel Order																						

6.7 Cancel Order

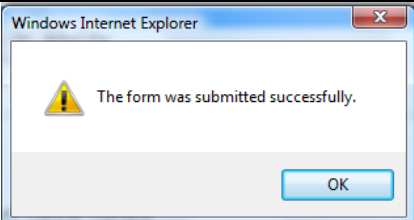
Step	Action	Screen Shot																											
1	Navigate to and select Orders and then Process Orders from the menu bar.																												
2	From Process Orders screen, select the highlighted patient name .	 <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td><input type="checkbox"/></td> <td>5/12/2011</td> <td>Patient2, Test</td> <td>4/30/1992</td> <td>Doctor1, Test</td> <td>Mercy Imaging</td> <td>CT - Folsom</td> <td>Scheduled</td> <td>5/12/2011 12:50 PM</td> </tr> <tr> <td><input type="checkbox"/></td> <td>5/9/2011</td> <td>broWn, test</td> <td>1/1/1990</td> <td>Doctor1, Test</td> <td>Mercy Imaging Order</td> <td></td> <td>Hold</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>4/20/2011</td> <td>Doe, Jane</td> <td>3/29/1966</td> <td>Doctor1, Test</td> <td>Film CD Order</td> <td>Film CD Order</td> <td>Cancel Order</td> <td></td> </tr> </table>	<input type="checkbox"/>	5/12/2011	Patient2, Test	4/30/1992	Doctor1, Test	Mercy Imaging	CT - Folsom	Scheduled	5/12/2011 12:50 PM	<input type="checkbox"/>	5/9/2011	broWn, test	1/1/1990	Doctor1, Test	Mercy Imaging Order		Hold		<input type="checkbox"/>	4/20/2011	Doe, Jane	3/29/1966	Doctor1, Test	Film CD Order	Film CD Order	Cancel Order	
<input type="checkbox"/>	5/12/2011	Patient2, Test	4/30/1992	Doctor1, Test	Mercy Imaging	CT - Folsom	Scheduled	5/12/2011 12:50 PM																					
<input type="checkbox"/>	5/9/2011	broWn, test	1/1/1990	Doctor1, Test	Mercy Imaging Order		Hold																						
<input type="checkbox"/>	4/20/2011	Doe, Jane	3/29/1966	Doctor1, Test	Film CD Order	Film CD Order	Cancel Order																						

3	<p>Select Cancel to cancel a previously ordered test.</p> <p>The Status will change from Ordered to Canceled in the Process Orders screen.</p>	
4	<p>A pop-up confirms the order is canceled.</p> <p>Select Ok to continue.</p> <p>Screen defaults to Process Order Inbox.</p>	
5	<p>The Order Status is changed to Canceled in the Process Orders Inbox.</p>	
6	<p><i>Note: Once Canceled, the order status cannot be changed by the practice unless Returned to Practice by the hospital.</i></p>	

6.8 Change Order Location


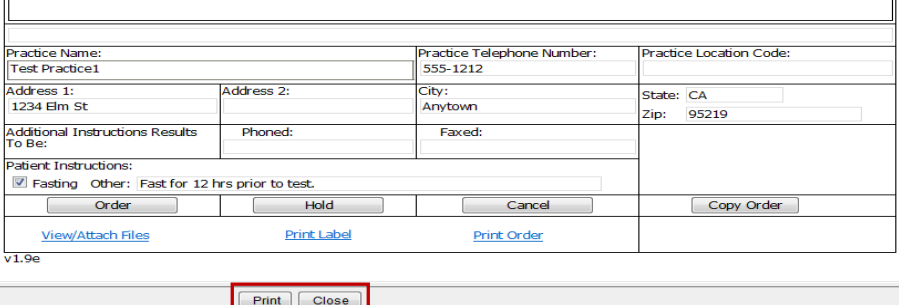
Note: Many Orders are configured for a single location, in which case the Change Location function will not be available.

Step	Action	Screen Shot
1	<p>Select on the highlighted patient name to open the Order.</p>	
2	<p>Select Change Location at the top of the Order form.</p>	
3	<p>Select the New Location and click OK.</p> <p>Select Cancel and/or Close to close the window without any action.</p>	

4	A pop-up window will confirm the location change was submitted successfully. Select Ok to continue.	
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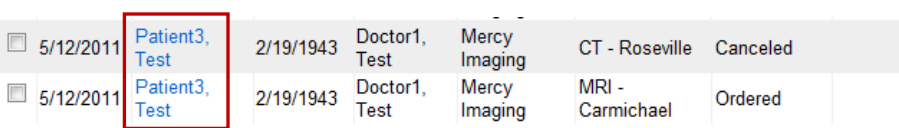
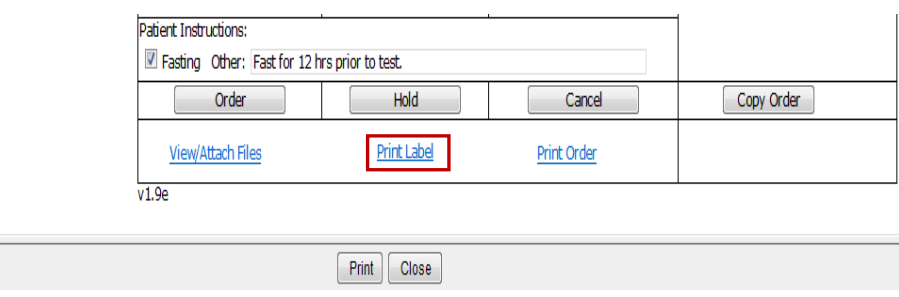
Note: If Scheduled, this action will cancel order and place order for new location.

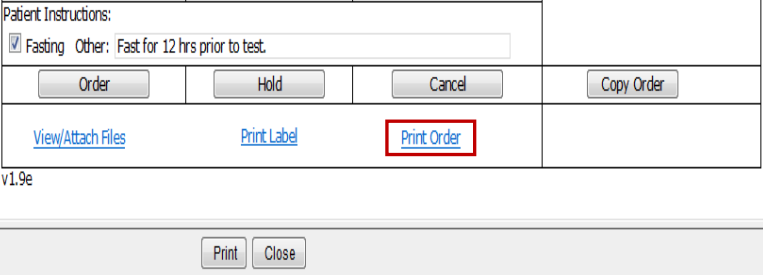
6.9 Print an Order

Step	Action	Screen Shot
1	Select the highlighted patient name to view the order.	
2	Select Print in the viewer box. Select Close to close the window.	

Note: An alternative method for printing is to right mouse click on the order form and select PRINT. Click OK in the print dialogue box.

6.10 Print Labels and Print Order

Step	Action	Screen Shot
1	Labels can only be printed <u>AFTER</u> an Order form has been Submitted or placed on Hold .	
2	Select the highlighted patient name to view the order.	
3	Select Print Labels . The screen will default to pre-formatted patient label . Select the Print icon or Ctrl+P . Select "X" in the upper right corner to close.	

<p>4</p>	<p>Select Print Order. The screen will default to Order form.</p> <p>Select the Print icon or Ctrl+P.</p> <p>Select "X" in the upper right corner to close.</p>	
----------	--	--

Note: An alternative method for printing is to right mouse click on the order form and select PRINT. Click OK in the print dialogue box.

6.11 Order Status Overview

The **Status** identifies the step in the workflow process in which the order currently resides. The status also manages who can access a document for changes.

Statuses and Actions allowed:

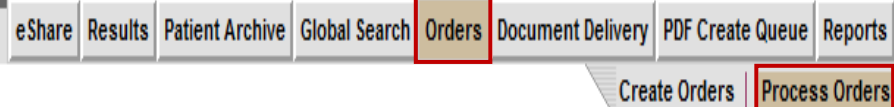
- **Hold** - practice has control of order, not yet signed.
- **Ordered** – both hospital and practice can take action.
- **In-Process** – hospital has control of order, practice cannot take action.
- **Scheduled** – hospital has control of order, practice cannot take action.
- **Action Requested** – hospital has returned order to practice for action, practice has control of order, and hospital cannot take action.
- **Cancel Order** - practice request to hospital to cancel order.
- **Canceled** - Controlling party canceled order.
- **Order Filled** – hospital has filled order.
- **Modified** – order has been modified.

7 Processing the Orders Inbox

The following steps will guide the user through viewing orders that have been submitted to the department inbox.

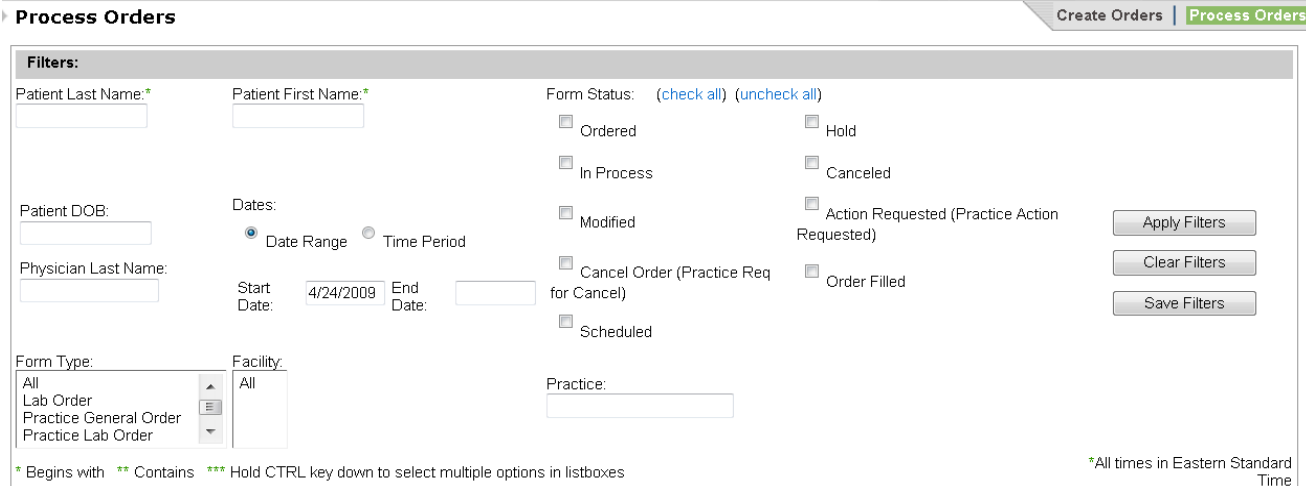
Note: Order Forms are specific to the practice or hospital. Please carefully read the form and complete all required fields defined by an asterisk and any open text fields. Not all fields described below may apply.

7.1 Process Orders Inbox

Step	Action	Screen Shot
1	Select Orders and then Process Orders from the menu bar.	

2	<p>From the Process Orders Inbox the user can:</p> <ul style="list-style-type: none"> • Set and save filters to display specific groups of orders. • Search for orders by patient name. • View order details by clicking patient name. • Enter scheduling information and notes for physician to view. Notes entered in the Scheduling Notes section will show in the workflow screen. • The Process Orders Inbox can be filtered to show specific Orders that require action. See Order Statuses Overview.
3	<p><i>Note: Orders may be changed as needed. If an order is filled, and a change occurs, the order can be subsequently opened and marked as returned to the practice for action or canceled. Once an order is marked as Return to Practice, only the practice can change or edit the order. Once an order is canceled, the order can no longer be changed by the practice without being returned to the practice by the hospital.</i></p>

7.2 Search Filters

Step	Action	Screen Shot
1	<p>Filter the Orders Inbox Documents</p> <p>Select from options available in the drop down lists to refine search results. To select multiple Document Types, Document Categories, Facilities, and Physicians, use the Ctrl key and click the intended items.</p> <p>Filter options include:</p> <ul style="list-style-type: none"> • Patient First and Last Name – Use this filter to locate the patient’s Orders form. • Form Status – Use this filter to show Orders with the same status. • Physician - Use this filter to show documents routed to one or more physicians. • Form Type - Use this filter to show one or more document type, such as Chemistry. • Facility - Use this filter to show documents originating from one or more hospital facilities. • Date Range - Use this filter to show only documents from a specified date range. 	 <p>The screenshot shows the 'Process Orders' interface. At the top right, there are buttons for 'Create Orders' and 'Process Orders'. Below this is a 'Filters' section with several input fields and checkboxes:</p> <ul style="list-style-type: none"> Patient Last Name: [Text Input] Patient First Name: [Text Input] Form Status: (check all) (uncheck all) <ul style="list-style-type: none"> <input type="checkbox"/> Ordered <input type="checkbox"/> In Process <input type="checkbox"/> Modified <input type="checkbox"/> Cancel Order (Practice Req for Cancel) <input type="checkbox"/> Scheduled <input type="checkbox"/> Hold <input type="checkbox"/> Canceled <input type="checkbox"/> Action Requested (Practice Action Requested) <input type="checkbox"/> Order Filled Dates: <ul style="list-style-type: none"> <input checked="" type="radio"/> Date Range <input type="radio"/> Time Period Start Date: 4/24/2009 End Date: [Text Input] Physician Last Name: [Text Input] Form Type: [Dropdown Menu: All, Lab Order, Practice General Order, Practice Lab Order] Facility: [Text Input: All] Practice: [Text Input] <p>Buttons on the right: Apply Filters, Clear Filters, Save Filters.</p> <p>Footnote: *All times in Eastern Standard Time</p>

2	<p>Enter intended search filters into the open fields.</p> <p>Select Apply Filters to execute the search filters.</p> <p>Select Clear Filters to clear the search filters.</p> <p>Select Save Filter to save a default search filters for subsequent use.</p> <p>*Note: to remove a Saved Filter, select Clear Filter and then select Save Filter again. Otherwise, the filter will still be in place at the next log on.</p>																																																																							
3	<p>View Order Form</p> <p>Select the highlighted patient name to view the document.</p>	<p>17 Items</p> <table border="1"> <thead> <tr> <th>Order Date</th> <th>Patient Name</th> <th>Date of Birth</th> <th>Physician</th> <th>Form Type</th> <th>Service Requested</th> <th>Status</th> <th>Med. Nec.</th> </tr> </thead> <tbody> <tr> <td>10/4/2011</td> <td>Test, Patient</td> <td>1/1/1987</td> <td>FUGATE, JEFFREY</td> <td>Lab Order</td> <td>FUNGUS CULTURE BLOOD</td> <td>Order Filled</td> <td></td> </tr> <tr> <td>8/19/2011</td> <td>RAAB, HENRY</td> <td>2/23/1915</td> <td>FUGATE, JEFFREY</td> <td>Lab Order</td> <td>17 KETOSTEROIDS URINE</td> <td>Ordered</td> <td>Pass</td> </tr> <tr> <td>8/10/2011</td> <td>P, R</td> <td>7/7/1974</td> <td>FUGATE, JEFFREY</td> <td>Nursing Home Order</td> <td>VITAMIN B1, PLASMA</td> <td>Ordered</td> <td></td> </tr> <tr> <td>8/10/2011</td> <td>P, R</td> <td>7/7/1974</td> <td>FUGATE, JEFFREY</td> <td>Lab Order</td> <td>1 HR GLUCOSE TOLERANCE</td> <td>Ordered</td> <td></td> </tr> </tbody> </table>	Order Date	Patient Name	Date of Birth	Physician	Form Type	Service Requested	Status	Med. Nec.	10/4/2011	Test, Patient	1/1/1987	FUGATE, JEFFREY	Lab Order	FUNGUS CULTURE BLOOD	Order Filled		8/19/2011	RAAB, HENRY	2/23/1915	FUGATE, JEFFREY	Lab Order	17 KETOSTEROIDS URINE	Ordered	Pass	8/10/2011	P, R	7/7/1974	FUGATE, JEFFREY	Nursing Home Order	VITAMIN B1, PLASMA	Ordered		8/10/2011	P, R	7/7/1974	FUGATE, JEFFREY	Lab Order	1 HR GLUCOSE TOLERANCE	Ordered																															
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<input checked="" type="checkbox"/>	8/10/2011	BOOK, RITAS	12/15/1955	FUGATE, JEFFREY	Nursing Home Order	VITAMIN B1, PLASMA	Order Filled		10/7/2011 8:03 PM																																																															
<input checked="" type="checkbox"/>	10/4/2011	BOOK, RITAS	12/15/1955	FUGATE, JEFFREY	Lab Order	GANGLIOSIDE AB PANEL	Order Filled		10/5/2011 1:47 PM																																																															
<input checked="" type="checkbox"/>	8/19/2011	ALBIZU, ELIZABETH	12/29/1960	FUGATE, JEFFREY	Lab Order	ANTIBODY SCREEN	Ordered	Fail	8/19/2011 9:25 AM																																																															
<input checked="" type="checkbox"/>	8/14/2011	ACKLEY, ARIANE	5/10/1978	FUGATE, JEFFREY	Scheduling Intake	Main OR	Ordered		9/14/2011 12:01 PM																																																															

7.3 Patient Scheduling and Comments

***Note: this section applies to hospital department workers only.**

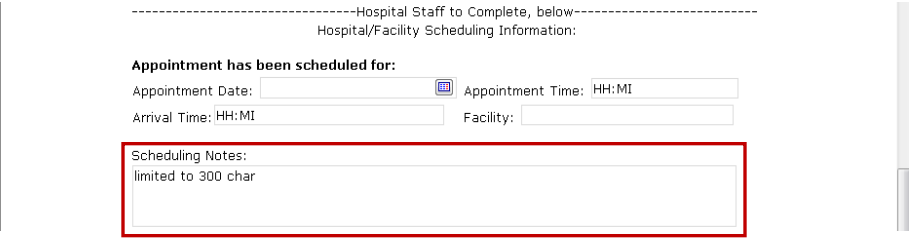
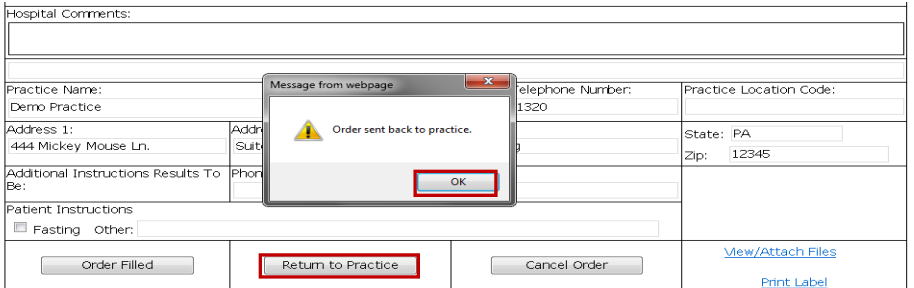
Step	Action	Screen Shot																																				
1	Select on the highlighted patient name to open the Order.	<table border="1"> <tr> <td><input type="checkbox"/></td> <td>8/19/2011</td> <td>BRUNNER, CHARLES</td> <td>10/24/1926</td> <td>FUGATE, JEFFREY</td> <td>Lab Order</td> <td>ANTI-CARDIOLIPIN IGA</td> <td>Ordered</td> <td>Pass</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>9/9/2011</td> <td>Brazelton, Esperanza</td> <td>2/27/1999</td> <td>FUGATE, JEFFREY</td> <td>Lab Order</td> <td>ANTI-CARDIOLIPIN IGA</td> <td>Ordered</td> <td></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>8/10/2011</td> <td>BOOK, RITAS</td> <td>12/15/1955</td> <td>FUGATE, JEFFREY</td> <td>Nursing Home Order</td> <td>VITAMIN B1, PLASMA</td> <td>Order Filled</td> <td></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>10/4/2011</td> <td>BOOK, RITAS</td> <td>12/15/1955</td> <td>FUGATE, JEFFREY</td> <td>Lab Order</td> <td>GANGLIOSIDE AB PANEL</td> <td>Order Filled</td> <td></td> </tr> </table>	<input type="checkbox"/>	8/19/2011	BRUNNER, CHARLES	10/24/1926	FUGATE, JEFFREY	Lab Order	ANTI-CARDIOLIPIN IGA	Ordered	Pass	<input checked="" type="checkbox"/>	9/9/2011	Brazelton, Esperanza	2/27/1999	FUGATE, JEFFREY	Lab Order	ANTI-CARDIOLIPIN IGA	Ordered		<input checked="" type="checkbox"/>	8/10/2011	BOOK, RITAS	12/15/1955	FUGATE, JEFFREY	Nursing Home Order	VITAMIN B1, PLASMA	Order Filled		<input checked="" type="checkbox"/>	10/4/2011	BOOK, RITAS	12/15/1955	FUGATE, JEFFREY	Lab Order	GANGLIOSIDE AB PANEL	Order Filled	
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<input checked="" type="checkbox"/>	10/4/2011	BOOK, RITAS	12/15/1955	FUGATE, JEFFREY	Lab Order	GANGLIOSIDE AB PANEL	Order Filled																															
2	<p>Scroll down to section marked Hospital Staff to Complete.</p> <p>Enter the Scheduling information into the open text fields.</p> <p>Enter comments into Scheduling Notes, if required. Notes can include additional patient information, incorrect test code, etc.</p>	<p>-----Hospital Staff to Complete, below----- Hospital/Facility Scheduling Information:</p> <p>Appointment has been scheduled for:</p> <p>Appointment Date: <input type="text"/> Appointment Time: <input type="text"/> HH:MI</p> <p>Arrival Time: <input type="text"/> Facility: <input type="text"/></p> <p>Scheduling Notes: <input type="text" value="limited to 300 char"/></p> <p><input type="button" value="Schedule"/> <input type="button" value="Return for Action"/> <input type="button" value="In-Process"/> <input type="button" value="Cancel Order"/></p>																																				
3	<p>Select Schedule to complete.</p> <p>A dialog window will confirm order is scheduled.</p> <p>Select Okay to continue.</p>	<p>-----Hospital Staff to Complete, below----- Hospital/Facility Scheduling Information:</p> <p>Appointment has been scheduled for:</p> <p>Appointment Date: <input type="text" value="10/12/2011"/> Appointment Time: <input type="text" value="10:30"/> HH:MI</p> <p>Arrival Time: <input type="text"/> Facility: <input type="text"/></p> <p>Scheduling Notes: <input type="text" value="Patient will be in for the test"/></p> <p><input checked="" type="button" value="Schedule"/> <input type="button" value="Return for Action"/> <input type="button" value="In-Process"/> <input type="button" value="Cancel Order"/></p>																																				

*Note: Orders may be changed as needed. If an order is scheduled, and a change occurs, the order can be opened and marked as **In Process**, **Cancelled** or **Returned to the practice for action**. The location can also be changed, if the patient decides to go to a different location for the testing. See [Change Order Location](#).*

7.4 Return Order for Action

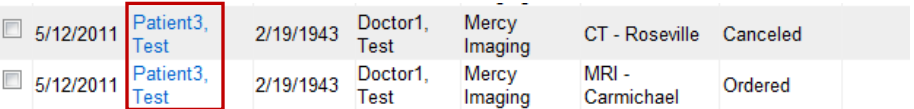
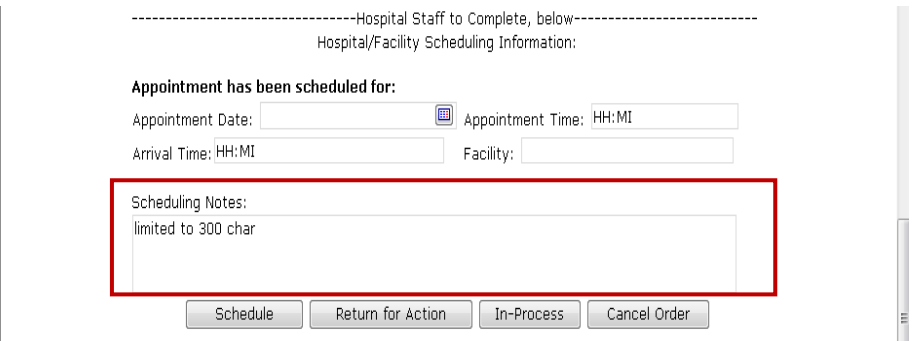
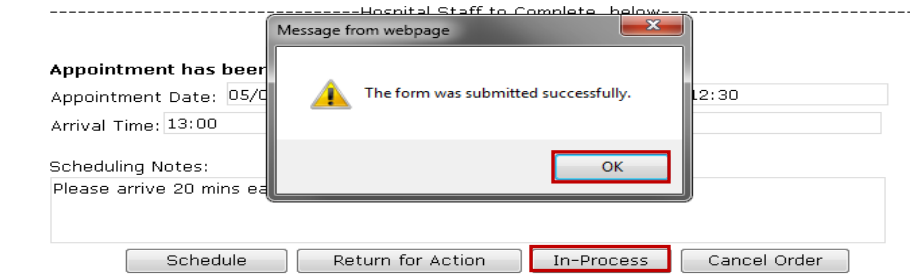
***Note: this section applies to hospital department workers only.**

Step	Action	Screen Shot																		
1	Select on the highlighted patient name to open the Order.	<table border="1"> <tr> <td><input type="checkbox"/></td> <td>5/12/2011</td> <td>Patient3, Test</td> <td>2/19/1943</td> <td>Doctor1, Test</td> <td>Mercy Imaging</td> <td>CT - Roseville</td> <td>Canceled</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>5/12/2011</td> <td>Patient3, Test</td> <td>2/19/1943</td> <td>Doctor1, Test</td> <td>Mercy Imaging</td> <td>MRI - Carmichael</td> <td>Ordered</td> <td></td> </tr> </table>	<input type="checkbox"/>	5/12/2011	Patient3, Test	2/19/1943	Doctor1, Test	Mercy Imaging	CT - Roseville	Canceled		<input type="checkbox"/>	5/12/2011	Patient3, Test	2/19/1943	Doctor1, Test	Mercy Imaging	MRI - Carmichael	Ordered	
<input type="checkbox"/>	5/12/2011	Patient3, Test	2/19/1943	Doctor1, Test	Mercy Imaging	CT - Roseville	Canceled													
<input type="checkbox"/>	5/12/2011	Patient3, Test	2/19/1943	Doctor1, Test	Mercy Imaging	MRI - Carmichael	Ordered													

<p>2</p>	<p>Enter comments into Scheduling Notes, if required.</p> <p>Notes can include additional patient information, incorrect test code, etc.</p>	
<p>3</p>	<p>Select Return for action to complete.</p> <p>A dialog window will confirm order sent back to practice.</p> <p>Select Okay to continue.</p>	

7.5 Order In-Process

***Note: this section applies to hospital department workers only.**

Step	Action	Screen Shot
<p>1</p>	<p>Select on the highlighted patient name to open the Order.</p>	
<p>2</p>	<p>Enter comments into Scheduling Notes, if required.</p> <p>Notes can include additional patient information, incorrect test code, etc.</p>	
<p>3</p>	<p>Select In-Process to complete.</p> <p>A dialog window will confirm order sent back to practice.</p> <p>Select Okay to continue.</p> <p>Active Status will change to In-Process in the inbox.</p>	

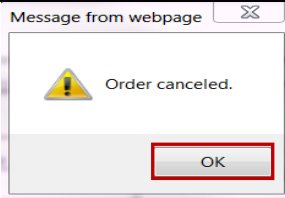
7.6 Order Filled

***Note: this section applies to hospital department workers only.**

Step	Action	Screen Shot																
1	Select on the highlighted patient name to open the Order.	<table border="1"> <tr> <td><input type="checkbox"/></td> <td>5/12/2011</td> <td>Patient3, Test</td> <td>2/19/1943</td> <td>Doctor1, Test</td> <td>Mercy Imaging</td> <td>CT - Roseville</td> <td>Canceled</td> </tr> <tr> <td><input type="checkbox"/></td> <td>5/12/2011</td> <td>Patient3, Test</td> <td>2/19/1943</td> <td>Doctor1, Test</td> <td>Mercy Imaging</td> <td>MRI - Carmichael</td> <td>Ordered</td> </tr> </table>	<input type="checkbox"/>	5/12/2011	Patient3, Test	2/19/1943	Doctor1, Test	Mercy Imaging	CT - Roseville	Canceled	<input type="checkbox"/>	5/12/2011	Patient3, Test	2/19/1943	Doctor1, Test	Mercy Imaging	MRI - Carmichael	Ordered
<input type="checkbox"/>	5/12/2011	Patient3, Test	2/19/1943	Doctor1, Test	Mercy Imaging	CT - Roseville	Canceled											
<input type="checkbox"/>	5/12/2011	Patient3, Test	2/19/1943	Doctor1, Test	Mercy Imaging	MRI - Carmichael	Ordered											
2	Enter comments into Scheduling Notes , if required. Notes can include additional patient information, incorrect test code, etc.	<p>-----Hospital Staff to Complete, below----- Hospital/Facility Scheduling Information:</p> <p>Appointment has been scheduled for:</p> <p>Appointment Date: <input type="text"/> Appointment Time: HH:MI <input type="text"/></p> <p>Arrival Time: HH:MI <input type="text"/> Facility: <input type="text"/></p> <p>Scheduling Notes: limited to 300 char</p>																
3	Select Order Filled to complete. A dialog window will confirm order sent back to practice. Select Okay to continue. Active Status will change to Order Filled in the inbox.	<p>Hospital Comments:</p> <p>Electronically signed by FUGATE,JEFFREY (L) 4:46 PM</p> <p>Practice Name: Demo Practice Practice Telephone Number: 420-1320 Practice Location Code:</p> <p>Address 1: 444 Mickey Mouse Ln. Address 2: Suite 999 Harrisburg State: PA Zip: 12345</p> <p>Additional Instructions Results To Be: Phoned: Faxed:</p> <p>Patient Instructions <input type="checkbox"/> Fasting Other:</p> <p>Order Filled Return to Practice Cancel Order View/Attach Files Print Label</p>																


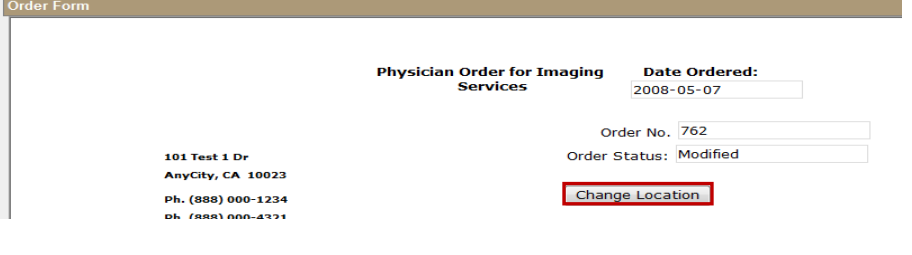
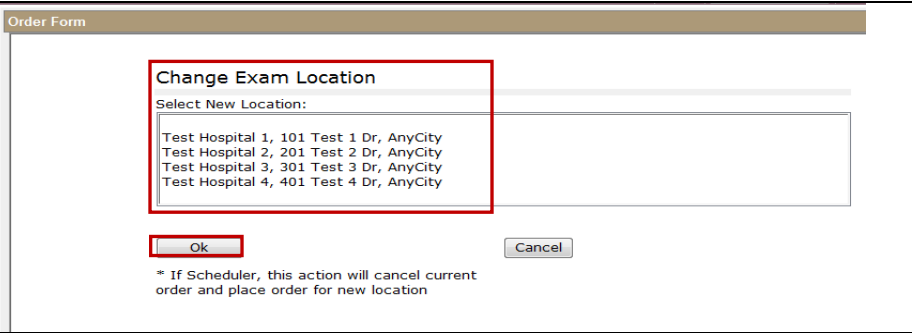
7.7 Cancel Order

Step	Action	Screen Shot																											
1	Select Orders and then Process Orders from the menu bar.	<p>eShare Results Patient Archive Global Search Orders PDF Create Queue My Account</p> <p>Create Orders Process Orders</p>																											
2	From Process Orders screen, select the highlighted patient name .	<table border="1"> <tr> <td><input type="checkbox"/></td> <td>5/12/2011</td> <td>Patient2, Test</td> <td>4/30/1992</td> <td>Doctor1, Test</td> <td>Mercy Imaging</td> <td>CT - Folsom</td> <td>Scheduled</td> <td>5/12/2011 12:50 PM</td> </tr> <tr> <td><input type="checkbox"/></td> <td>5/9/2011</td> <td>broWn, test</td> <td>1/1/1990</td> <td>Doctor1, Test</td> <td>Mercy Imaging Order</td> <td></td> <td>Hold</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>4/20/2011</td> <td>Doe, Jane</td> <td>3/29/1966</td> <td>Doctor1, Test</td> <td>Film CD Order</td> <td>Film CD Order</td> <td>Cancel Order</td> <td></td> </tr> </table>	<input type="checkbox"/>	5/12/2011	Patient2, Test	4/30/1992	Doctor1, Test	Mercy Imaging	CT - Folsom	Scheduled	5/12/2011 12:50 PM	<input type="checkbox"/>	5/9/2011	broWn, test	1/1/1990	Doctor1, Test	Mercy Imaging Order		Hold		<input type="checkbox"/>	4/20/2011	Doe, Jane	3/29/1966	Doctor1, Test	Film CD Order	Film CD Order	Cancel Order	
<input type="checkbox"/>	5/12/2011	Patient2, Test	4/30/1992	Doctor1, Test	Mercy Imaging	CT - Folsom	Scheduled	5/12/2011 12:50 PM																					
<input type="checkbox"/>	5/9/2011	broWn, test	1/1/1990	Doctor1, Test	Mercy Imaging Order		Hold																						
<input type="checkbox"/>	4/20/2011	Doe, Jane	3/29/1966	Doctor1, Test	Film CD Order	Film CD Order	Cancel Order																						
3	Select Cancel . Note: The Cancel button may be in a different location depending on the type of order.	<p>Practice Name: Demo Primary Care Practice Telephone Number: Hospital Use Only</p> <p>Address 1: 345 Mulberry Ln. City: Harrisburg</p> <p>Address 2: State: PA</p> <p>Ordering Physician: WELBY, MARCUS Practice Zip: 17101</p> <p>View/Attach Files Print Label</p> <p>Order Hold Cancel</p> <p>Patient Instructions <input checked="" type="checkbox"/> Fasting Other: No Food after midnight.</p>																											

4	<p>A pop-up confirms that the Order is canceled. Select Ok to continue. Screen defaults to Process Order Inbox.</p>																	
5	<p>The Order Status is changed to Canceled in the Process Orders Inbox.</p>	<table border="1"> <tr> <td><input type="checkbox"/></td> <td>5/12/2011</td> <td>Patient3, Test</td> <td>2/19/1943</td> <td>Doctor1, Test</td> <td>Mercy Imaging</td> <td>CT - Roseville</td> <td>Canceled</td> </tr> <tr> <td><input type="checkbox"/></td> <td>5/12/2011</td> <td>Patient3, Test</td> <td>2/19/1943</td> <td>Doctor1, Test</td> <td>Mercy Imaging</td> <td>MRI - Carmichael</td> <td>Ordered</td> </tr> </table>	<input type="checkbox"/>	5/12/2011	Patient3, Test	2/19/1943	Doctor1, Test	Mercy Imaging	CT - Roseville	Canceled	<input type="checkbox"/>	5/12/2011	Patient3, Test	2/19/1943	Doctor1, Test	Mercy Imaging	MRI - Carmichael	Ordered
<input type="checkbox"/>	5/12/2011	Patient3, Test	2/19/1943	Doctor1, Test	Mercy Imaging	CT - Roseville	Canceled											
<input type="checkbox"/>	5/12/2011	Patient3, Test	2/19/1943	Doctor1, Test	Mercy Imaging	MRI - Carmichael	Ordered											
6	<p><i>Note: Once Canceled, the order status cannot be changed by the practice unless Returned to Practice by the hospital.</i></p>																	

7.8 Change Order Location

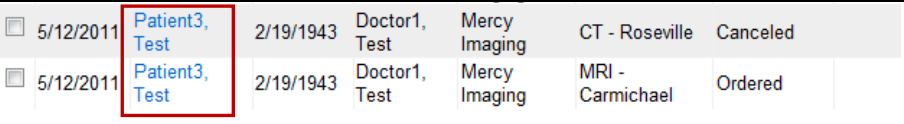
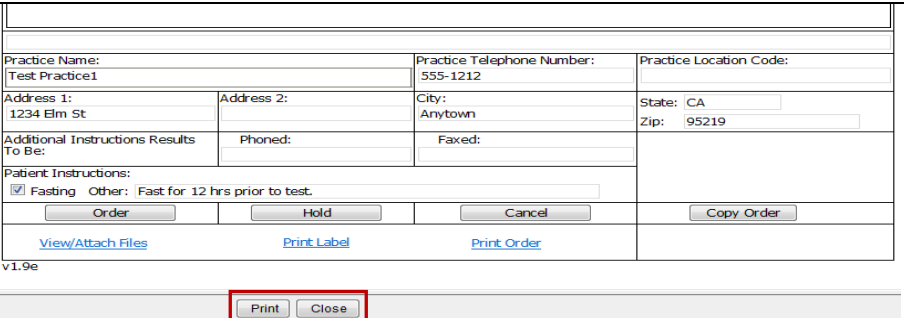
Many Orders are configured for a single location, in which case the Change Location function will not be available.

Step	Action	Screen Shot
1	<p>Select on the highlighted patient name to open the Order.</p>	
2	<p>Select Change Location.</p>	
3	<p>Select the New Location and click OK. Select Cancel and/or Close to close the window without any action.</p>	
4	<p>A pop-up window will confirm the form was submitted successfully. Select Ok to continue.</p>	

Note: If Scheduled, this action will cancel order and place order for new location.

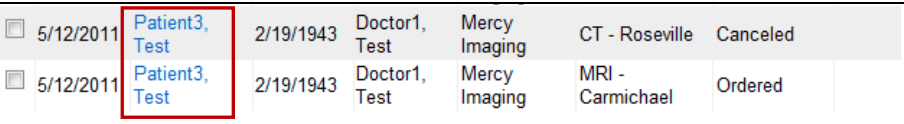
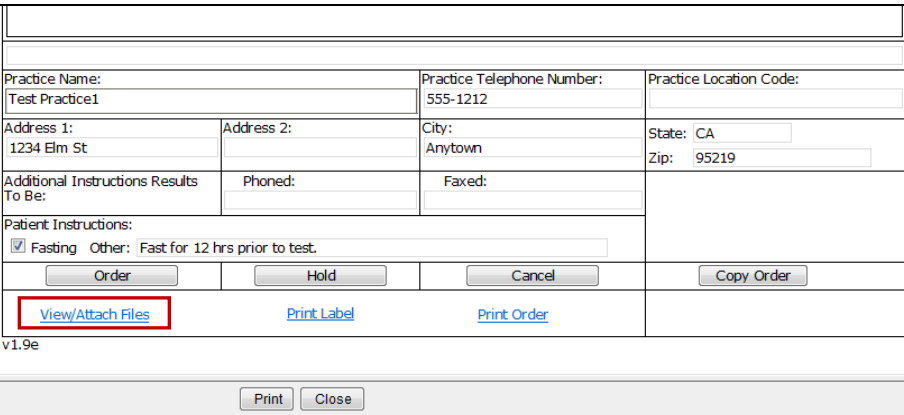
7.9 Print an Order

Step	Action	Screen Shot
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1	Select the highlighted patient name to view the order.	
2	Select Print in the viewer box. Select Close to close the window.	

Note: An alternative method for printing is to right mouse click on the order form and select PRINT. Click OK in the print dialogue box.

7.10 View and Attach Files

Step	Action	Screen Shot
1	Select the highlighted patient name to view the order.	
2	Select View/Attach Files .	
3	Enter a Description and then select Browse . Browse through computer files and select the intended file to attach. Select Open .	<p>View and Attach Files</p> <p>Close window by selecting 'X' in upper right corner</p> <p>Description: *</p> <input type="text"/> <p>Please select a file: *</p> <input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Upload"/> <p>Files uploaded to this order:</p>
4	Select Upload and complete the order form.	
5	Close window by selecting the 'X' in the upper right corner.	
6	The order form will show a paperclip icon as the attachment in the Form Type column located in the Orders Inbox.	

7.11 Print Labels and Print Order

Step	Action	Screen Shot																
1	Labels can only be printed <u>AFTER</u> an Order form has been Submitted or placed on Hold .																	
2	Select the highlighted patient name to view the order.	<table border="1"> <tr> <td><input type="checkbox"/></td> <td>5/12/2011</td> <td>Patient3, Test</td> <td>2/19/1943</td> <td>Doctor1, Test</td> <td>Mercy Imaging</td> <td>CT - Roseville</td> <td>Canceled</td> </tr> <tr> <td><input type="checkbox"/></td> <td>5/12/2011</td> <td>Patient3, Test</td> <td>2/19/1943</td> <td>Doctor1, Test</td> <td>Mercy Imaging</td> <td>MRI - Carmichael</td> <td>Ordered</td> </tr> </table>	<input type="checkbox"/>	5/12/2011	Patient3, Test	2/19/1943	Doctor1, Test	Mercy Imaging	CT - Roseville	Canceled	<input type="checkbox"/>	5/12/2011	Patient3, Test	2/19/1943	Doctor1, Test	Mercy Imaging	MRI - Carmichael	Ordered
<input type="checkbox"/>	5/12/2011	Patient3, Test	2/19/1943	Doctor1, Test	Mercy Imaging	CT - Roseville	Canceled											
<input type="checkbox"/>	5/12/2011	Patient3, Test	2/19/1943	Doctor1, Test	Mercy Imaging	MRI - Carmichael	Ordered											
3	Select Print Labels . The screen will default to pre-formatted patient label . Select the Print icon or Ctrl+P . Select "X" in the upper right corner to close.	<p>Practice Name: Test Practice1 Practice Telephone Number: 555-1212 Practice Location Code:</p> <p>Address 1: 1234 Elm St Address 2: City: Anytown State: CA Zip: 95219</p> <p>Additional Instructions Results To Be: Phoned: Faxed:</p> <p>Patient Instructions: <input checked="" type="checkbox"/> Fasting Other: Fast for 12 hrs prior to test.</p> <p>Order Hold Cancel Copy Order</p> <p>View/Attach Files Print Label Print Order</p> <p>Print Close</p>																
4	Select Print Order . The screen will default to Order form . Select the Print icon or Ctrl+P . Select "X" in the upper right corner to close.	<p>Patient Instructions: <input checked="" type="checkbox"/> Fasting Other: Fast for 12 hrs prior to test.</p> <p>Order Hold Cancel Copy Order</p> <p>View/Attach Files Print Label Print Order</p> <p>Print Close</p>																

Note: An alternative method for printing is to right mouse click on the order form and select PRINT. Click OK in the print dialogue box.

7.12 Archive Order

Step	Action	Screen Shot																																								
1	Select Orders and then Process Orders from the menu bar.	<p>eShare Results Patient Archive Global Search Orders PDF Create Queue My Account</p> <p>Create Orders Process Orders</p>																																								
2	Select the Archive tab to view the archived Orders.	<p>Inbox Archived Items</p> <p>9 Items</p> <table border="1"> <thead> <tr> <th>Order Date</th> <th>Patient Name</th> <th>Date of Birth</th> <th>Physician</th> <th>Form Type</th> <th>Service Requested</th> <th>Status</th> <th>Med. Nec.</th> <th>Sched Date</th> <th>Last Updated</th> </tr> </thead> <tbody> <tr> <td>8/10/2011</td> <td>P, R</td> <td>7/7/1974</td> <td>FUGATE, JEFFREY</td> <td>Lab Order</td> <td>1 HR GLUCOSE TOLERANCE</td> <td>Canceled</td> <td></td> <td></td> <td>8/11/2011 8:27 AM</td> </tr> <tr> <td>8/10/2011</td> <td>WICKARD, CHRISTY</td> <td>11/24/1959</td> <td>FUGATE, JEFFREY</td> <td>Lab Order</td> <td>1 HR GLUCOSE TOLERANCE</td> <td>Canceled</td> <td></td> <td></td> <td>8/11/2011 8:27 AM</td> </tr> <tr> <td>7/20/2011</td> <td>WICKARD, CHRISTY</td> <td>11/24/1959</td> <td>FUGATE, JEFFREY</td> <td>Lab Order</td> <td>LIVER KIDNEY MICROSOME AB IGG</td> <td>Ordered</td> <td></td> <td></td> <td>8/11/2011 8:27 AM</td> </tr> </tbody> </table>	Order Date	Patient Name	Date of Birth	Physician	Form Type	Service Requested	Status	Med. Nec.	Sched Date	Last Updated	8/10/2011	P, R	7/7/1974	FUGATE, JEFFREY	Lab Order	1 HR GLUCOSE TOLERANCE	Canceled			8/11/2011 8:27 AM	8/10/2011	WICKARD, CHRISTY	11/24/1959	FUGATE, JEFFREY	Lab Order	1 HR GLUCOSE TOLERANCE	Canceled			8/11/2011 8:27 AM	7/20/2011	WICKARD, CHRISTY	11/24/1959	FUGATE, JEFFREY	Lab Order	LIVER KIDNEY MICROSOME AB IGG	Ordered			8/11/2011 8:27 AM
Order Date	Patient Name	Date of Birth	Physician	Form Type	Service Requested	Status	Med. Nec.	Sched Date	Last Updated																																	
8/10/2011	P, R	7/7/1974	FUGATE, JEFFREY	Lab Order	1 HR GLUCOSE TOLERANCE	Canceled			8/11/2011 8:27 AM																																	
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7.13 Order Status Overview

The **Status** identifies the step in the workflow process in which the order currently resides. The status also manages who can access a document for changes.

Statutes and Actions allowed:

- **Hold** - practice has control of order, not yet signed.
- **Ordered** – both hospital and practice can take action.
- **In-Process** – hospital has control of order, practice cannot take action.
- **Scheduled** – hospital has control of order, practice cannot take action.
- **Action Requested** – hospital has returned order to practice for action, practice has control of order, and hospital cannot take action.
- **Cancel Order** - practice request to hospital to cancel order.
- **Canceled** - Controlling party canceled order.
- **Order Filled** – hospital has filled order.
- **Modified** – order has been modified.

7.14 Order Notifications Summary

The following table provides a summary of the different email alerts that can be generated based on an Orders Status change.

Status Alert	Event Description	Email Recipient	Email Alert Type
Ordered	When the Practice submits a complete Order to the Hospital.	Hospital User	Ordered Email Alert
Action Requested	When the Hospital returns the Order to the Practice with a request for more information.	Practice User	Action Requested Email Alert
Modified	When the Practice re-submits the Order following an Action Request.	Hospital User	Modified Email Alert
Scheduled	When a Hospital reschedules an appointment.	Practice User	Scheduled Email Alert
Cancel Order	When the Practice requests an Order be canceled after it is returned for action.	Hospital User	Cancel Email Alert


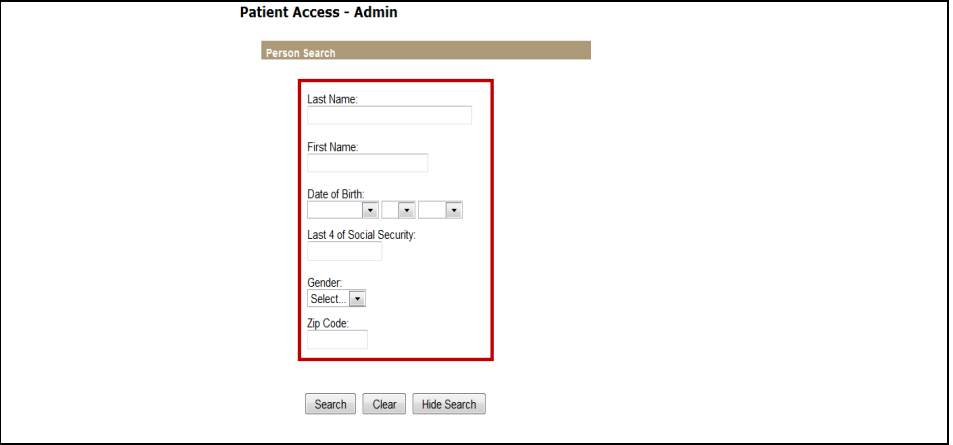

8 Provisioning Patient Access



















The following sections will guide the user through the steps to provision and grant patients with access to the Patient Access Portal.

8.1 Patient Access Terms and Conditions

Step	Action	Screen Shot
1	The patient must agree and sign the Terms and Conditions of use before using the portal.	PLEASE READ THE FOLLOWING PATIENT PORTAL TERMS AND CONDITIONS OF USE BEFORE USING XYZ Medical Center – Houston Patient Portal (THE "PATIENT PORTAL"). BY SIGNING THIS ACKNOWLEDGEMENT IN THE SPACE BELOW AND USING THE PATIENT PORTAL, YOU ARE AGREEING TO BE BOUND BY THE PATIENT PORTAL TERMS AND CONDITIONS OF USE. IF YOU DO NOT AGREE TO THE PATIENT PORTAL TERMS AND CONDITIONS OF USE, YOU MAY ELECTRONICALLY, CLICK "DISAGREE/DECLINE".
2	If the patient does not agree to these Terms of Use, they select Disagree/Decline and do not use the Patient Portal.	
3	The Terms and Conditions is both an AGREEMENT between the Facility providing the Patient Portal and the Patient.	

8.2 Create New Patient Access Account

Step	Action	Screen Shot
1	Select the Patient Access tab located in the menu bar.	
2	Search for patient by entering patient identifying information . i.e. Last Name, First Name, Date of Birth, Last 4 of SSN, Gender or Zip Code. Select Search to execute query. Note - Search Results will only display enrolled Patient Access Accounts.	
3	Select Create New Person if patient is <u>NOT</u> found. Continue to section Patient Access Account Search if patient is found.	

<p>4</p>	<p>Enter patient User Demographics.</p>	<p>Patient Access - Admin</p> <p>User Demographics</p> <p>Last Name: <input type="text" value="Smith"/> First Name: <input type="text"/></p> <p>Middle Name: <input type="text"/></p> <p>Date of Birth: <input type="text"/> <input type="text"/> <input type="text"/> Last 4 of Social Security: <input type="text"/></p> <p>Gender: <input type="text" value="Select..."/></p> <p>Documentation Presented: <input type="text" value="Select..."/></p> <p>Address 1: <input type="text"/></p> <p>Address 2: <input type="text"/></p> <p>City: <input type="text"/> State: <input type="text" value="Select..."/></p> <p>Zip Code: <input type="text"/> Country: <input type="text" value="United States"/></p>																														
<p>5</p>	<p>Enter patient Contact Information. Select Preferred Contact Method.</p>	<p>Contact Information</p> <p>Home Phone: <input type="text"/> <input type="checkbox"/> Primary Mobile Phone: <input type="text"/> <input type="checkbox"/> Primary</p> <p>Work Phone: <input type="text"/> <input type="checkbox"/> Primary</p> <p>Primary Email: <input type="text"/> Secondary Email: <input type="text"/></p> <p>Preferred Contact Method: <input type="text" value="Select..."/></p>																														
<p>6</p>	<p>Select Link New Accounts. Screen defaults to Patient Record Lookup.</p>	<p>Linked Accounts</p> <p>Account Name Relationships</p> <p>No accounts linked</p> <p><input type="button" value="Link New Account"/></p>																														
<p>7</p>	<p>Enter the patient's Last Name and either DOB, MRN, SSN or Gender and Zip Code. Or select the checkbox next to Same as Provisioned User. Select Search to execute query. Screen defaults to search results.</p>	<p>Patient Record Lookup</p> <p>* Last Name: <input type="text" value="Test"/> <input checked="" type="checkbox"/> Same as Provisioned User?</p> <p>First Name: <input type="text" value="James"/></p> <p>Date of Birth: <input type="text"/> <input type="text"/> <input type="text"/></p> <p>* Last 4 of Social Security: <input type="text"/></p> <p>* Medical Record Number: <input type="text"/></p> <p>* Gender: <input type="text" value="Male"/></p> <p>* Zip Code: <input type="text" value="16507"/></p> <p>* Last Name and either (DOB, MRN, SSN, or Gender and Zip Code) are required for searching the Patient repository</p> <p><input type="button" value="Search"/> <input type="button" value="Clear"/></p>																														
<p>8</p>	<p>Select the Patient Summary icon to view the Patient Summary page in the Search Results.</p>	<p>4 Search Results</p> <table border="1"> <thead> <tr> <th></th> <th></th> <th>Last Name</th> <th>First Name</th> <th>Date of Birth</th> <th>Social Security Number</th> </tr> </thead> <tbody> <tr> <td>Select</td> <td></td> <td>BOOK</td> <td>RITA M</td> <td>12/15/1955</td> <td>XXX-XX-8772</td> </tr> <tr> <td>Select</td> <td></td> <td>BOOK</td> <td>RITA</td> <td>08/08/1954</td> <td></td> </tr> <tr> <td>Select</td> <td></td> <td>BOOK</td> <td>RITAS</td> <td>12/15/1955</td> <td>XXX-XX-8772</td> </tr> <tr> <td>Select</td> <td></td> <td>BOOK</td> <td>RITA</td> <td>12/15/1955</td> <td>XXX-XX-8772</td> </tr> </tbody> </table>			Last Name	First Name	Date of Birth	Social Security Number	Select		BOOK	RITA M	12/15/1955	XXX-XX-8772	Select		BOOK	RITA	08/08/1954		Select		BOOK	RITAS	12/15/1955	XXX-XX-8772	Select		BOOK	RITA	12/15/1955	XXX-XX-8772
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<p>9</p>	<p>Select the Face Sheet icon to view patient information. Select Close to return to the</p>	<p>Visits</p> <table border="1"> <thead> <tr> <th>Visit Type</th> <th>Visit Date</th> <th>Facility</th> <th>Account Number</th> <th>Face Sheet</th> </tr> </thead> <tbody> <tr> <td>Inpatient</td> <td>9/21/2011 12:06:00 AM</td> <td>Community General Osteopathic Hospital</td> <td>100000194</td> <td></td> </tr> <tr> <td>Inpatient</td> <td>11/12/2010 7:43:00 AM</td> <td>Harrisburg Hospital</td> <td>119000001</td> <td></td> </tr> </tbody> </table>	Visit Type	Visit Date	Facility	Account Number	Face Sheet	Inpatient	9/21/2011 12:06:00 AM	Community General Osteopathic Hospital	100000194		Inpatient	11/12/2010 7:43:00 AM	Harrisburg Hospital	119000001																
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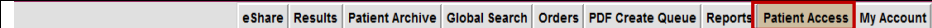
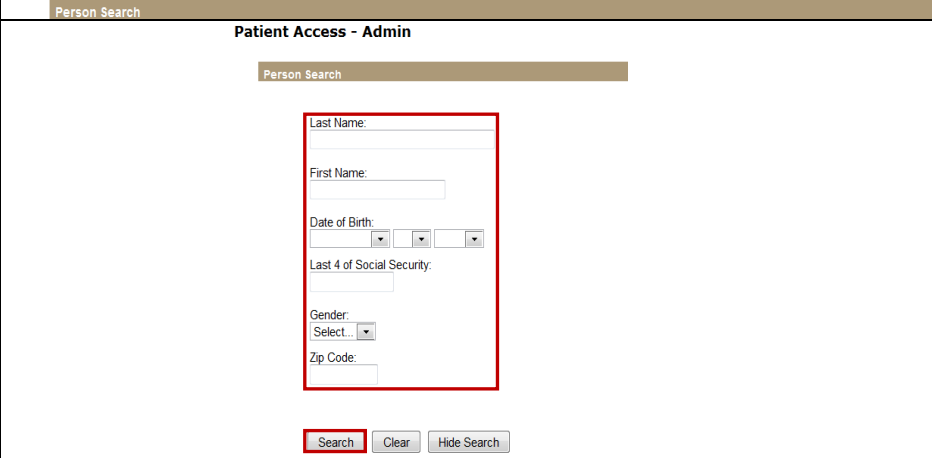
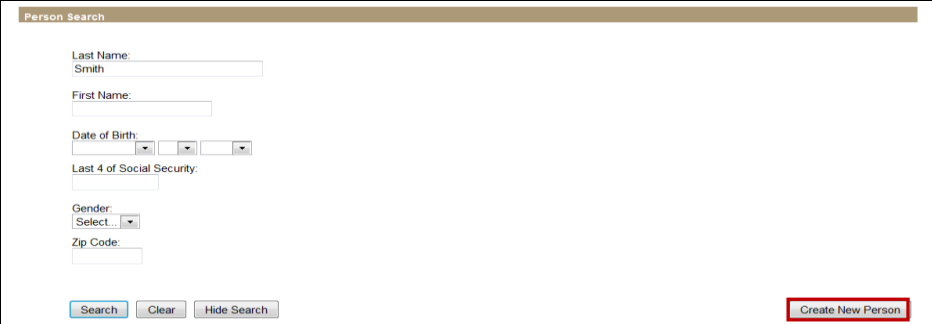
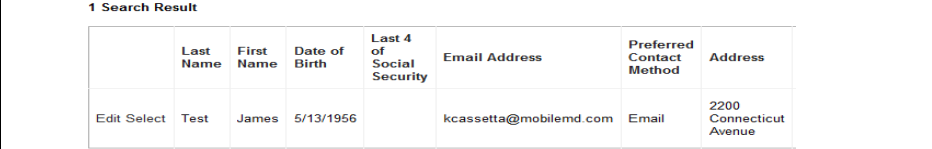
	Patient Record Lookup.																			
10	Select to link the search result to the Patient Account.	<p>4 Search Results</p> <table border="1"> <thead> <tr> <th></th> <th></th> <th>Last Name</th> <th>First Name</th> <th>Date of Birth</th> <th>Social Security Number</th> </tr> </thead> <tbody> <tr> <td>Select</td> <td></td> <td>BOOK</td> <td>RITA M</td> <td>12/15/1955</td> <td>XXX-XX-8772</td> </tr> <tr> <td>Select</td> <td></td> <td>BOOK</td> <td>RITA</td> <td>08/08/1954</td> <td></td> </tr> </tbody> </table>			Last Name	First Name	Date of Birth	Social Security Number	Select		BOOK	RITA M	12/15/1955	XXX-XX-8772	Select		BOOK	RITA	08/08/1954	
		Last Name	First Name	Date of Birth	Social Security Number															
Select		BOOK	RITA M	12/15/1955	XXX-XX-8772															
Select		BOOK	RITA	08/08/1954																
11	To link additional Medical Record Numbers to the patient, repeat the above steps.																			
12	Select Complete to finish.																			
13	Select the drop down arrow to select the relationship to the patient.	<p>Account Name: RITA BOOK</p> <p>Relationships: </p> <p></p> <p></p>																		
14	Select Create Provision to link the accounts to the Patient.	<p>Linked Accounts</p> <p>Account Name: No accounts linked</p> <p>Relationships:</p> <p></p> <p></p>																		
15	<p>The Confirmation page contains the Patient Access Account User Validation Key Code.</p> <p><u>Print the User Validation Key Code for the patient.</u></p> <p>Select the Print icon located on the dialog screen.</p> <p>Select Complete to close.</p>	<p>MobileMD HIE Patient Access Portal</p> <p>User Validation Key Code: o6AFd5</p> <p><i>Self-Registration email.</i> An email message has been sent from the Patient Access portal to the primary email account you provided during the Patient Authentication process. The email message contains instructions to complete the self-registration process and setup your user account within the MobileMD HIE Patient Access portal. If you haven't received an email to complete the registration process, please contact the office which setup your account.</p> <p><i>How to use the Validation Code.</i> The user validation key code displayed above is a secure key generated during the Patient Access authentication process. You must enter this validation key code exactly as it appears after following the link contained in the self-registration email in order to access your health records within the MobileMD HIE.</p> <p>Contact the office that provided this information if you experience any problems during the registration process.</p> <p></p> <p>Additional help is available online within the MobileMD HIE Patient</p> <p></p>																		

8.3 New Patient User Registration

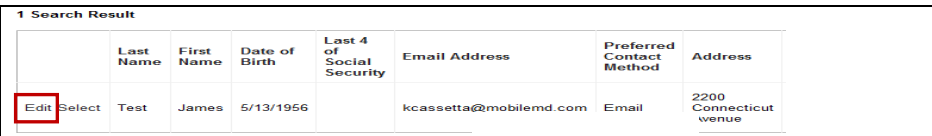
Step	Action	Screen Shot
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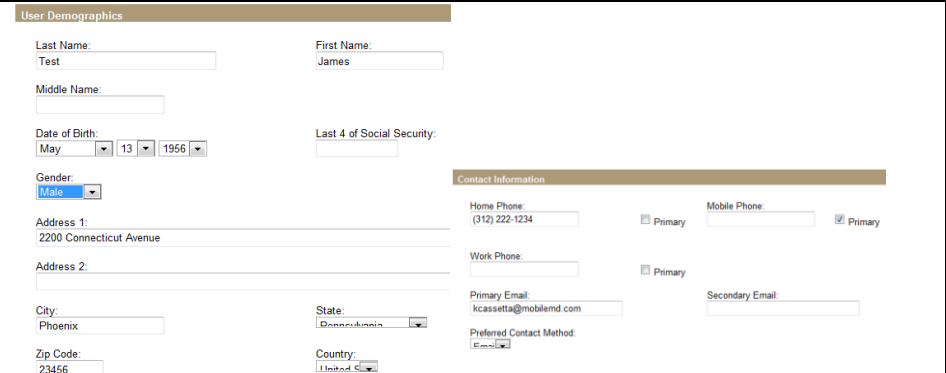
<p>1</p>	<p>Upon receipt of the personalized User Validation Code, a secure email containing a link to the Patient Access portal is sent to the patient's email address provided.</p>	<p>Welcome new user to the MobileMD Patient Access Web site.</p> <p>noreply@mobilemd.com</p> <p>Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.</p> <p>Sent: Wed 11/2/2011 4:04 PM To: snyberg@mobilemd.com</p> <hr/> <p>Hello Rita Book,</p> <p>This email message was sent by MobileMD Hie to the email account(s) you provided to the Health Information Department during your user authentication process. To complete the self-registration process and setup your user account within the MobileMD Hie Patient Access portal click here</p> <p>Contact the Health Information Department at the numbers listed below if you experience any problems creating your account. Additional help is available online via the Help menu at the Patient Access Portal</p>
<p>2</p>	<p>The patient will select the link within the secure email and enter the secure User Validation Code. Select Submit to continue.</p>	<p>Patient Access Portal</p> <hr/> <p>This page allows you to complete the self-registration process and setup a user account with the MobileMD Hie Patient Access Portal.</p> <p>How to use the Validation Code Enter your validation key code in the box below exactly as provided to you. You will be directed to a self-registration page allowing you to create a user account with access to your authorized health records within the MobileMD Hie Patient Access Portal.</p> <div style="border: 1px solid red; padding: 5px;"> <p>Enter your Validation Code:</p> <input type="text"/> <input type="button" value="Submit"/> </div> <p>Need Help? Contact the office that provided this User Validation Key Code should you experience any problems during the self-registration process. Additional help is available online within the HIE Patient Access portal.</p>
<p>3</p>	<p>Patient can accept the Default User ID or enter a personalized User ID. Enter a personalized password and then enter password again to confirm. Select Create to continue.</p>	<p>There are no usernames or passwords associated with you at this time. Please create a username and password below.</p> <div style="border: 1px solid red; padding: 5px;"> <p>Username: <input type="text" value="BookR"/></p> <p>Password: <input type="password"/></p> <p>Confirm Password: <input type="password"/></p> </div> <p style="text-align: right;"> <input style="border: 1px solid red;" type="button" value="Create"/> <input type="button" value="Cancel"/> </p>
<p>4</p>	<p>A pop-up will confirm that the provisioning request is successfully completed. Select the X in the upper right corner to close page. User Registration is complete. Patient can continue to log on.</p>	

8.4 Patient Access Search

Step	Action	Screen Shot
1	Select the Patient Access tab located in the menu bar.	
2	Search for patient by entering patient identifying information . i.e. Last Name, First Name, Date of Birth, Last 4 of SSN, Gender or Zip Code. Select Search to execute query. Note - Search Results will only display enrolled Patient Access Accounts.	
3	Select Create New Person if patient is <u>NOT</u> found.	
4	Search results will display at the bottom of the page.	

8.5 Edit Patient Access

Step	Action	Screen Shot
1	Complete a Patient Access Search .	
2	Select Edit .	

3	<p>Complete updates to the patient's User Demographics and Contact Information.</p> <p>Select Save to continue.</p> <p>A pop-up window will confirm any changes to the patient's profile.</p> <p>Select Complete.</p>	
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8.6 Reset Patient Access Password

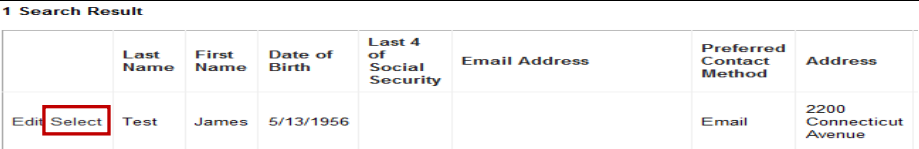
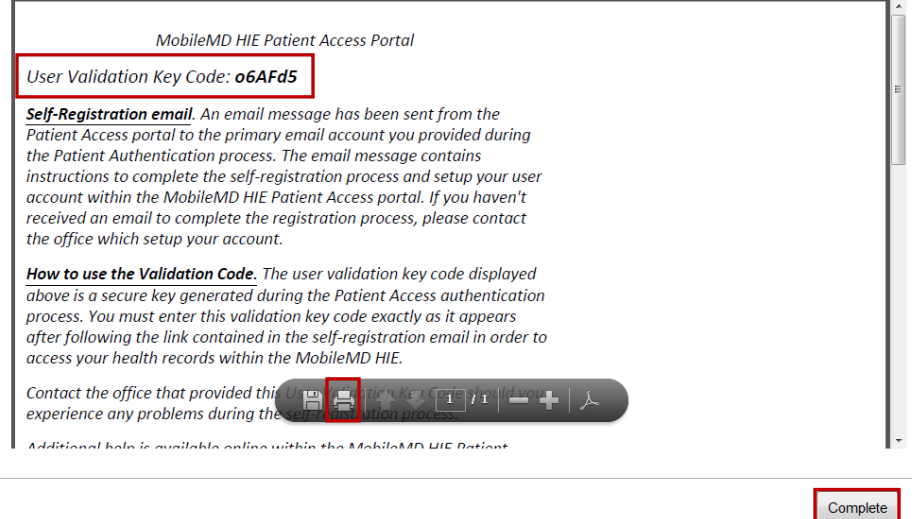
Step	Action	Screen Shot																														
1	Complete a Patient Access Search .																															
2	Select Reset Password . The password is reset instantly.																															
3	User can also reset password from the Patient Access Admin Page by clicking Select and then selecting Reset Password .	<p>1 Search Result</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th></th> <th>Last Name</th> <th>First Name</th> <th>Date of Birth</th> <th>Last 4 of Social Security</th> <th>Email Address</th> <th>Preferred Contact Method</th> <th>Address</th> <th>City</th> <th>State</th> <th>Zip Code</th> <th>Username</th> <th>Date User Created</th> <th>User Status</th> <th></th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">Edit Select</td> <td>Test</td> <td>James</td> <td>5/13/1956</td> <td></td> <td>kcassetta@mobilemd.com</td> <td>Email</td> <td>2200 Connecticut Avenue</td> <td>Phoenix</td> <td>Pa</td> <td>23456</td> <td>TestJames</td> <td>6/15/2011</td> <td>Active</td> <td style="text-align: right;"> <input type="button" value="Reset Password"/> <input type="button" value="Disable User"/> </td> </tr> </tbody> </table>		Last Name	First Name	Date of Birth	Last 4 of Social Security	Email Address	Preferred Contact Method	Address	City	State	Zip Code	Username	Date User Created	User Status		Edit Select	Test	James	5/13/1956		kcassetta@mobilemd.com	Email	2200 Connecticut Avenue	Phoenix	Pa	23456	TestJames	6/15/2011	Active	<input type="button" value="Reset Password"/> <input type="button" value="Disable User"/>
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Edit Select	Test	James	5/13/1956		kcassetta@mobilemd.com	Email	2200 Connecticut Avenue	Phoenix	Pa	23456	TestJames	6/15/2011	Active	<input type="button" value="Reset Password"/> <input type="button" value="Disable User"/>																		
4	A pop-up confirms that the password is reset and an email has been sent to the patient's primary email address. Select Ok to continue.																															

8.7 Disable Patient Access User

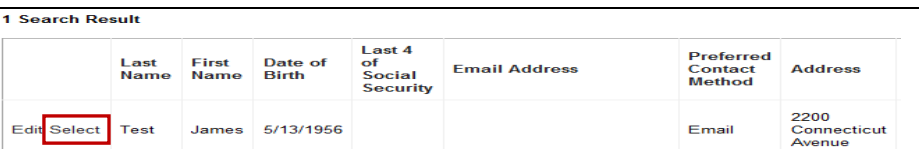
Step	Action	Screen Shot																														
1	Complete a Patient Access Search .																															
2	Select Disable User to deactivate the patient's portal account.																															
3	User can also disable user from the Patient Access Admin Page by clicking Select and then selecting Disable User .	<p>1 Search Result</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th></th> <th>Last Name</th> <th>First Name</th> <th>Date of Birth</th> <th>Last 4 of Social Security</th> <th>Email Address</th> <th>Preferred Contact Method</th> <th>Address</th> <th>City</th> <th>State</th> <th>Zip Code</th> <th>Username</th> <th>Date User Created</th> <th>User Status</th> <th></th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">Edit Select</td> <td>Test</td> <td>James</td> <td>5/13/1956</td> <td></td> <td>kcassetta@mobilemd.com</td> <td>Email</td> <td>2200 Connecticut Avenue</td> <td>Phoenix</td> <td>Pa</td> <td>23456</td> <td>TestJames</td> <td>6/15/2011</td> <td>Active</td> <td style="text-align: right;"> <input type="button" value="Reset Password"/> <input type="button" value="Disable User"/> </td> </tr> </tbody> </table>		Last Name	First Name	Date of Birth	Last 4 of Social Security	Email Address	Preferred Contact Method	Address	City	State	Zip Code	Username	Date User Created	User Status		Edit Select	Test	James	5/13/1956		kcassetta@mobilemd.com	Email	2200 Connecticut Avenue	Phoenix	Pa	23456	TestJames	6/15/2011	Active	<input type="button" value="Reset Password"/> <input type="button" value="Disable User"/>
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4	The User Status will change from Active to Logon Disabled .																															
5	A pop-up will confirm that the user is permanently disabled from the Patient Account. Select Yes to continue.	<p>1 Search Result</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th></th> <th>Last Name</th> <th>First Name</th> <th>Date of Birth</th> <th>Last 4 of Social Security</th> <th>Email Address</th> <th>Preferred Contact Method</th> <th>Address</th> <th>City</th> <th>State</th> <th>Zip Code</th> <th>Username</th> <th>Date User Created</th> <th>User Status</th> <th></th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">Edit Select</td> <td>Smith</td> <td>John</td> <td>1/1/1950</td> <td>1234</td> <td>kcassetta@mobilemd.com</td> <td>Email</td> <td>123 Nevada Avenue</td> <td>Reno</td> <td>Nv</td> <td>89501</td> <td>Smith1234J</td> <td>4/20/2011</td> <td>Logon Disabled</td> <td style="text-align: right;"> <input type="button" value="Reset Password"/> <input type="button" value="Disable User"/> </td> </tr> </tbody> </table>		Last Name	First Name	Date of Birth	Last 4 of Social Security	Email Address	Preferred Contact Method	Address	City	State	Zip Code	Username	Date User Created	User Status		Edit Select	Smith	John	1/1/1950	1234	kcassetta@mobilemd.com	Email	123 Nevada Avenue	Reno	Nv	89501	Smith1234J	4/20/2011	Logon Disabled	<input type="button" value="Reset Password"/> <input type="button" value="Disable User"/>
	Last Name	First Name	Date of Birth	Last 4 of Social Security	Email Address	Preferred Contact Method	Address	City	State	Zip Code	Username	Date User Created	User Status																			
Edit Select	Smith	John	1/1/1950	1234	kcassetta@mobilemd.com	Email	123 Nevada Avenue	Reno	Nv	89501	Smith1234J	4/20/2011	Logon Disabled	<input type="button" value="Reset Password"/> <input type="button" value="Disable User"/>																		

	Select No to close window with no action.	
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8.8 Lost User Validate Code

Step	Action	Screen Shot																
1	Complete a Patient Access Search .																	
2	Click Select to enter the Patient Access account.																	
3	Select Lost Passcode to generate a <u>new Validation Code</u> for the patient.	 <p>1 Search Result</p> <table border="1"> <thead> <tr> <th></th> <th>Last Name</th> <th>First Name</th> <th>Date of Birth</th> <th>Last 4 of Social Security</th> <th>Email Address</th> <th>Preferred Contact Method</th> <th>Address</th> </tr> </thead> <tbody> <tr> <td>Edit Select</td> <td>Test</td> <td>James</td> <td>5/13/1956</td> <td></td> <td></td> <td>Email</td> <td>2200 Connecticut Avenue</td> </tr> </tbody> </table>		Last Name	First Name	Date of Birth	Last 4 of Social Security	Email Address	Preferred Contact Method	Address	Edit Select	Test	James	5/13/1956			Email	2200 Connecticut Avenue
	Last Name	First Name	Date of Birth	Last 4 of Social Security	Email Address	Preferred Contact Method	Address											
Edit Select	Test	James	5/13/1956			Email	2200 Connecticut Avenue											
4	<p>The Confirmation page contains the Patient Access Account User Validation Key Code.</p> <p>Print the User Validation Key Code for the patient.</p> <p>Select the Print icon located on the dialog screen.</p> <p>Select Close.</p>	 <p style="text-align: center;">MobileMD HIE Patient Access Portal</p> <p>User Validation Key Code: o6AFd5</p> <p>Self-Registration email. An email message has been sent from the Patient Access portal to the primary email account you provided during the Patient Authentication process. The email message contains instructions to complete the self-registration process and setup your user account within the MobileMD HIE Patient Access portal. If you haven't received an email to complete the registration process, please contact the office which setup your account.</p> <p>How to use the Validation Code. The user validation key code displayed above is a secure key generated during the Patient Access authentication process. You must enter this validation key code exactly as it appears after following the link contained in the self-registration email in order to access your health records within the MobileMD HIE.</p> <p>Contact the office that provided this information if you experience any problems during the self-registration process.</p> <p>Additional help is available online within the MobileMD HIE Patient Access Portal.</p> <p style="text-align: right;">Complete</p>																

8.9 Resend Secure Email

Step	Action	Screen Shot																
1	Complete a Patient Access Search .																	
2	Click Select to enter the Patient Access account.	 <p>1 Search Result</p> <table border="1"> <thead> <tr> <th></th> <th>Last Name</th> <th>First Name</th> <th>Date of Birth</th> <th>Last 4 of Social Security</th> <th>Email Address</th> <th>Preferred Contact Method</th> <th>Address</th> </tr> </thead> <tbody> <tr> <td>Edit Select</td> <td>Test</td> <td>James</td> <td>5/13/1956</td> <td></td> <td></td> <td>Email</td> <td>2200 Connecticut Avenue</td> </tr> </tbody> </table>		Last Name	First Name	Date of Birth	Last 4 of Social Security	Email Address	Preferred Contact Method	Address	Edit Select	Test	James	5/13/1956			Email	2200 Connecticut Avenue
	Last Name	First Name	Date of Birth	Last 4 of Social Security	Email Address	Preferred Contact Method	Address											
Edit Select	Test	James	5/13/1956			Email	2200 Connecticut Avenue											
3	Select Resend Email to resend the secure email to the primary email provided.																	
4	A pop-up screen will confirm that a secure email has been sent to the patient's primary email address provide.																	

8.10 Cancel Patient Access Request

Step	Action	Screen Shot																		
1	Complete a Patient Access Search .																			
2	Click Select to enter the Patient Access account.	<table border="1"> <caption>1 Search Result</caption> <thead> <tr> <th>Last Name</th> <th>First Name</th> <th>Date of Birth</th> <th>Last 4 of Social Security</th> <th>Email Address</th> <th>Preferred Contact Method</th> <th>Address</th> </tr> </thead> <tbody> <tr> <td>Test</td> <td>James</td> <td>5/13/1956</td> <td></td> <td>-</td> <td>Email</td> <td>2200 Connecticut Avenue</td> </tr> </tbody> </table>	Last Name	First Name	Date of Birth	Last 4 of Social Security	Email Address	Preferred Contact Method	Address	Test	James	5/13/1956		-	Email	2200 Connecticut Avenue				
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Test	James	5/13/1956		-	Email	2200 Connecticut Avenue														
3	Select Cancel Request to cancel the request for Patient Access. This will deactivate the secure email registration and User Validation code.	<table border="1"> <thead> <tr> <th>Documentation Type</th> <th>Documentation Data</th> <th>Status</th> <th>Activated Date</th> <th>Email Address</th> <th>Account Creator</th> <th>Create Date</th> <th>Linked Records</th> <th>Instant Commands</th> </tr> </thead> <tbody> <tr> <td>Driver's License</td> <td>12121212</td> <td>Pending</td> <td></td> <td>snyberg@mobilemd.com</td> <td>Nyberg, Sarah [snyberg]</td> <td>6/6/2011</td> <td>1</td> <td> <input type="button" value="Lost Passcode"/> <input type="button" value="Resend Email"/> <input type="button" value="Cancel Request"/> </td> </tr> </tbody> </table>	Documentation Type	Documentation Data	Status	Activated Date	Email Address	Account Creator	Create Date	Linked Records	Instant Commands	Driver's License	12121212	Pending		snyberg@mobilemd.com	Nyberg, Sarah [snyberg]	6/6/2011	1	<input type="button" value="Lost Passcode"/> <input type="button" value="Resend Email"/> <input type="button" value="Cancel Request"/>
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4	A pop-up screen will confirm that a secure email has been sent to the patient's primary email address provide.																			

9 Document Delivery Module

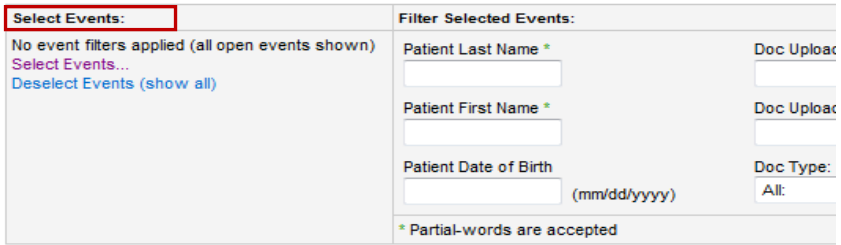
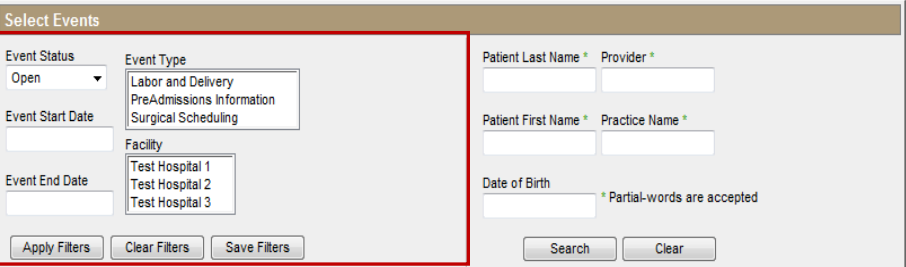
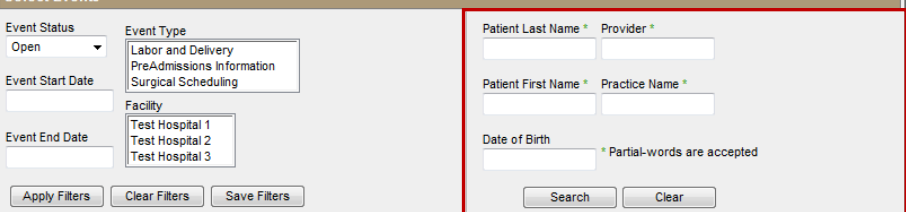
Note: The Document Delivery Module is being phased out in favor of the more flexible eShare module.

9.1 Upload Patient Documents



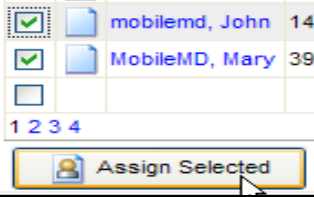
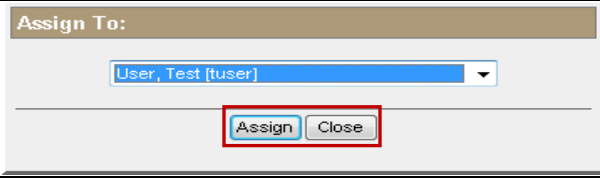

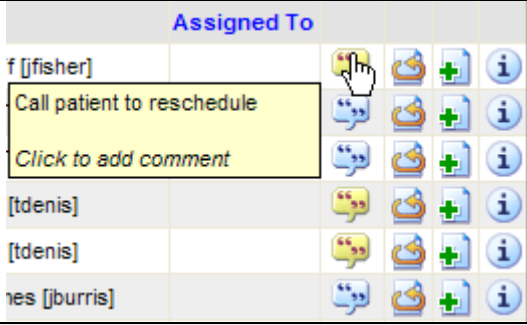

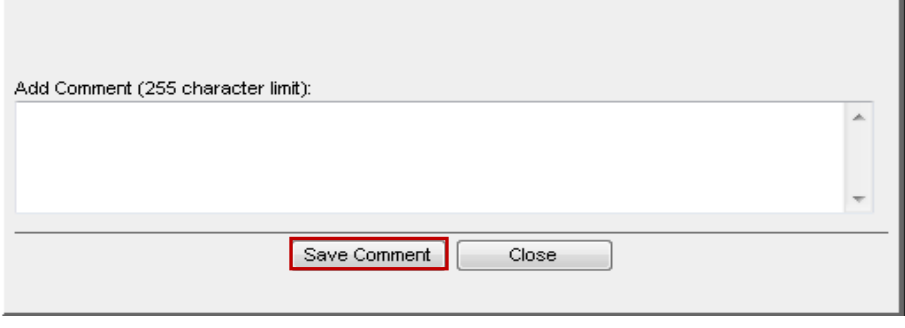
Step	Action	Screen Shot																																																
1	Preform a Patient Archive Search for an existing patient. Select Add Document . Select Create New Patient if adding documents for a new patient.	<p>Patient Archive Search</p> <p>3 Item(s)</p> <table border="1"> <thead> <tr> <th>Document Tree</th> <th>Print Tree</th> <th>Patient Summary</th> <th>eShare</th> <th>Add Document</th> <th>Last Name</th> <th>First Name</th> <th>Middle Name</th> <th>DOB</th> <th>SSN</th> <th>Gender</th> <th>Zip Code</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td><input type="button" value="+"/></td> <td>patient1</td> <td>Test</td> <td></td> <td>1/1/1960</td> <td>XXX-XX-6789</td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td><input type="button" value="+"/></td> <td>Patient1</td> <td>Test</td> <td></td> <td>8/12/1979</td> <td>XXX-XX-7766</td> <td>Female</td> <td>95832</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td><input type="button" value="+"/></td> <td>Patient1</td> <td>John</td> <td></td> <td>8/12/1979</td> <td>XXX-XX-7766</td> <td></td> <td></td> </tr> </tbody> </table> <p><input type="button" value="Return to Search"/> <input type="button" value="Create New Patient"/></p>	Document Tree	Print Tree	Patient Summary	eShare	Add Document	Last Name	First Name	Middle Name	DOB	SSN	Gender	Zip Code					<input type="button" value="+"/>	patient1	Test		1/1/1960	XXX-XX-6789							<input type="button" value="+"/>	Patient1	Test		8/12/1979	XXX-XX-7766	Female	95832					<input type="button" value="+"/>	Patient1	John		8/12/1979	XXX-XX-7766		
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2	Select Find an Event to select a patient event to upload documents.	<p>Upload Patient Documents</p> <p>Find a Patient</p> <p><input type="button" value="Find a Patient"/></p> <p>Selected Patient:</p> <table border="1"> <tr> <td>Patient1</td> <td>Test</td> <td>08/12/1979</td> <td>XXX-XX-7766</td> </tr> </table> <p>Find an Event</p> <p><input type="button" value="Find an Event"/></p>	Patient1	Test	08/12/1979	XXX-XX-7766																																												
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<p>3</p>	<p>Click Select to choose an existing patient event to upload documents to.</p> <p>Select the Create a New Event link at the bottom of the grid to locate the event.</p>	<p>Choose an Event</p> <table border="1"> <thead> <tr> <th>ID</th> <th>Type</th> <th>Patient</th> <th>Date</th> <th>Status</th> <th>Docs</th> <th>Description</th> </tr> </thead> <tbody> <tr><td>41</td><td>Labor and Delivery</td><td>Patient1, Test</td><td>4/30/2009 12:00:00 AM</td><td>Open</td><td>1</td><td>Preganancy</td></tr> <tr><td>38</td><td>Surgical Scheduling</td><td>Patient1, Test</td><td>3/27/2009 12:00:00 AM</td><td>Open</td><td>1</td><td>hysterectomy</td></tr> <tr><td>33</td><td>Surgical Scheduling</td><td>Patient1, Test</td><td>3/20/2009 12:00:00 AM</td><td>Open</td><td>0</td><td>GI</td></tr> <tr><td>29</td><td>Labor and Delivery</td><td>Patient1, Test</td><td>2/26/2009 12:00:00 AM</td><td>Closed</td><td>3</td><td>Normal Delivery</td></tr> <tr><td>28</td><td>PreAdmissions Information</td><td>Patient1, Test</td><td>2/13/2009 12:00:00 AM</td><td>Open</td><td>1</td><td>Surgery</td></tr> <tr><td>23</td><td>Labor and Delivery</td><td>Patient1, Test</td><td>2/2/2009 12:00:00 AM</td><td>Open</td><td>3</td><td>C Section</td></tr> <tr><td>26</td><td>Labor and Delivery</td><td>Patient1, Test</td><td>1/30/2009 12:00:00 AM</td><td>Open</td><td>2</td><td>Normal Birth</td></tr> <tr><td>27</td><td>Surgical Scheduling</td><td>Patient1, Test</td><td>1/30/2009 12:00:00 AM</td><td>Open</td><td>1</td><td>Heart surgery</td></tr> <tr><td>22</td><td>Surgical Scheduling</td><td>Patient1, Test</td><td>1/15/2009 12:00:00 AM</td><td>Open</td><td>2</td><td>right ankle surgery</td></tr> <tr><td>16</td><td>Surgical Scheduling</td><td>Patient1, Test</td><td>12/26/2008 12:00:00 AM</td><td>Closed</td><td>1</td><td>spine surgery</td></tr> </tbody> </table> <p>If you can't locate your event, click here to create a new event.</p>	ID	Type	Patient	Date	Status	Docs	Description	41	Labor and Delivery	Patient1, Test	4/30/2009 12:00:00 AM	Open	1	Preganancy	38	Surgical Scheduling	Patient1, Test	3/27/2009 12:00:00 AM	Open	1	hysterectomy	33	Surgical Scheduling	Patient1, Test	3/20/2009 12:00:00 AM	Open	0	GI	29	Labor and Delivery	Patient1, Test	2/26/2009 12:00:00 AM	Closed	3	Normal Delivery	28	PreAdmissions Information	Patient1, Test	2/13/2009 12:00:00 AM	Open	1	Surgery	23	Labor and Delivery	Patient1, Test	2/2/2009 12:00:00 AM	Open	3	C Section	26	Labor and Delivery	Patient1, Test	1/30/2009 12:00:00 AM	Open	2	Normal Birth	27	Surgical Scheduling	Patient1, Test	1/30/2009 12:00:00 AM	Open	1	Heart surgery	22	Surgical Scheduling	Patient1, Test	1/15/2009 12:00:00 AM	Open	2	right ankle surgery	16	Surgical Scheduling	Patient1, Test	12/26/2008 12:00:00 AM	Closed	1	spine surgery
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<p>5</p>	<p>Enter Document Description and Document Type.</p> <p>An asterisk identifies required fields.</p> <p>Select Browse to find the file from the local directory.</p> <p>Select Upload to upload documents to the Patient Event.</p> <p>Repeat steps to add additional documents.</p>	<p>Upload Document</p> <p>Document Date: * <input type="text" value="7/29/2009"/> Description: * <input type="text"/></p> <p>Comment: <input type="text"/> Document Type: * <input type="text" value="Uploaded Patient Document"/></p> <p>Please select a file: * <input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Upload"/></p> <p>Documents uploaded to this event:</p> <table border="1"> <thead> <tr> <th>Date</th> <th>Type</th> <th>Status</th> </tr> </thead> <tbody> <tr><td>3/2/2009</td><td>prenatal</td><td>New</td></tr> <tr><td>2/25/2009</td><td>CBC</td><td>New</td></tr> <tr><td>2/2/2009</td><td>GBS</td><td>Complete</td></tr> </tbody> </table>	Date	Type	Status	3/2/2009	prenatal	New	2/25/2009	CBC	New	2/2/2009	GBS	Complete																																																																	
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<h2>9.2 Document Delivery Inbox</h2>		
Step	Action	Screen Shot
1	<p>Select the Document Delivery tab and then select Document Delivery Inbox.</p>	<p>eShare Results Patient Archive Global Search Orders Document Delivery PDF Create Queue Reports</p> <p>Patient Document Upload Document Delivery Inbox</p>

<p>2</p>	<p>Click Select Events to filter the patient events and their associated documents.</p>	<p>Document Delivery Inbox</p> 																																																																						
<p>3</p>	<p>Filter Events by selecting one or more of the filter fields: Event Status, Event Type, Event Start / End Date, Facility.</p> <p>Select Apply Filters to filter the results.</p> <p>Select Save Filters to save and apply the filter criteria for subsequent visits to this page.</p> <p>Select Clear Filters to remove all filter criteria.</p>	 <table border="1" data-bbox="597 760 1497 1096"> <thead> <tr> <th>ID</th> <th>Patient</th> <th>Description</th> <th>Event Type</th> <th>Date</th> <th>Status</th> <th>Docs</th> </tr> </thead> <tbody> <tr> <td>50</td> <td>Patient4, Test</td> <td>Lab Results - Blood...</td> <td>Surgical Scheduling</td> <td>9/17/2009 12:00 AM</td> <td>Open</td> <td>1</td> </tr> <tr> <td>49</td> <td>Patient1, Test</td> <td>Rt Sh Surgery</td> <td>Surgical Scheduling</td> <td>8/25/2009 12:00 AM</td> <td>Open</td> <td>1</td> </tr> <tr> <td>48</td> <td>test, as</td> <td>28 week labs</td> <td>Labor and Delivery</td> <td>7/31/2009 12:00 AM</td> <td>Open</td> <td>2</td> </tr> <tr> <td>47</td> <td>Patient4, Test</td> <td>EDD Normal Delivery</td> <td>Labor and Delivery</td> <td>7/11/2009 12:00 AM</td> <td>Open</td> <td>2</td> </tr> <tr> <td>46</td> <td>patient1, Test</td> <td>Rt Sh Surgery</td> <td>Surgical Scheduling</td> <td>6/24/2009 12:00 AM</td> <td>Open</td> <td>0</td> </tr> <tr> <td>45</td> <td>Patient4, Test</td> <td>Colorectal Surgery</td> <td>Surgical Scheduling</td> <td>6/12/2009 12:00 AM</td> <td>Open</td> <td>9</td> </tr> <tr> <td>44</td> <td>Patient1, John</td> <td>Rt Shoulder Surger</td> <td>Surgical Scheduling</td> <td>5/28/2009 12:00 AM</td> <td>Open</td> <td>0</td> </tr> <tr> <td>42</td> <td>patient1, Test</td> <td>Left Knee Surgery</td> <td>Surgical Scheduling</td> <td>5/13/2009 12:00 AM</td> <td>Open</td> <td>1</td> </tr> <tr> <td>43</td> <td>patient1, Test</td> <td>Rt Shoulder Surgery</td> <td>Surgical Scheduling</td> <td>5/12/2009 12:00 AM</td> <td>Open</td> <td>4</td> </tr> </tbody> </table>	ID	Patient	Description	Event Type	Date	Status	Docs	50	Patient4, Test	Lab Results - Blood...	Surgical Scheduling	9/17/2009 12:00 AM	Open	1	49	Patient1, Test	Rt Sh Surgery	Surgical Scheduling	8/25/2009 12:00 AM	Open	1	48	test, as	28 week labs	Labor and Delivery	7/31/2009 12:00 AM	Open	2	47	Patient4, Test	EDD Normal Delivery	Labor and Delivery	7/11/2009 12:00 AM	Open	2	46	patient1, Test	Rt Sh Surgery	Surgical Scheduling	6/24/2009 12:00 AM	Open	0	45	Patient4, Test	Colorectal Surgery	Surgical Scheduling	6/12/2009 12:00 AM	Open	9	44	Patient1, John	Rt Shoulder Surger	Surgical Scheduling	5/28/2009 12:00 AM	Open	0	42	patient1, Test	Left Knee Surgery	Surgical Scheduling	5/13/2009 12:00 AM	Open	1	43	patient1, Test	Rt Shoulder Surgery	Surgical Scheduling	5/12/2009 12:00 AM	Open	4
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6	<p>The page will refresh to display the documents associated with the selected events.</p>	
7	<p>Select the Document icon to view documents associated with the selected events.</p>	
8	<p>Select Deselect Events (show all) link to clear the selected events filters.</p>	
9	<p>Users can Filter Searched Events by entering search criteria within any of the available filter fields available search fields.</p> <ul style="list-style-type: none"> • Patient Last Name • Patient First Name • Date of Birth • Document Upload Start Date • Document Upload End Date • Document Type • Practice Name • Provider Last Name <p>Select Apply Filters to filter the grid using the selected criteria.</p> <p>Save Filters saves and applies the filter criteria for subsequent visits to this page.</p> <p>Clear Filters removes all filter criteria.</p>	
10	<p>Change the status of a document by selecting the status entry and then changing the radio button.</p>	
11	<p>Select the individual documents and select Change Status to change the status of multiple documents.</p> <p>Select the Document Status from the drop down list.</p>	
12	<p>Select the Re-Index icon to change document index values.</p>	


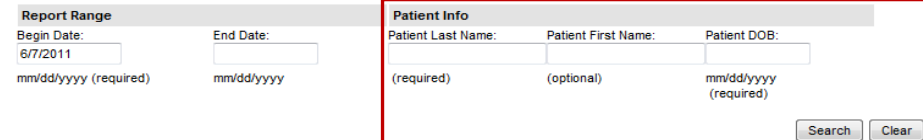
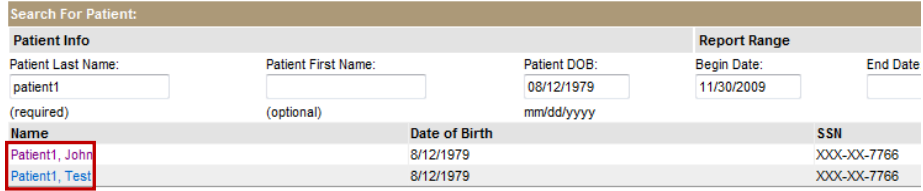
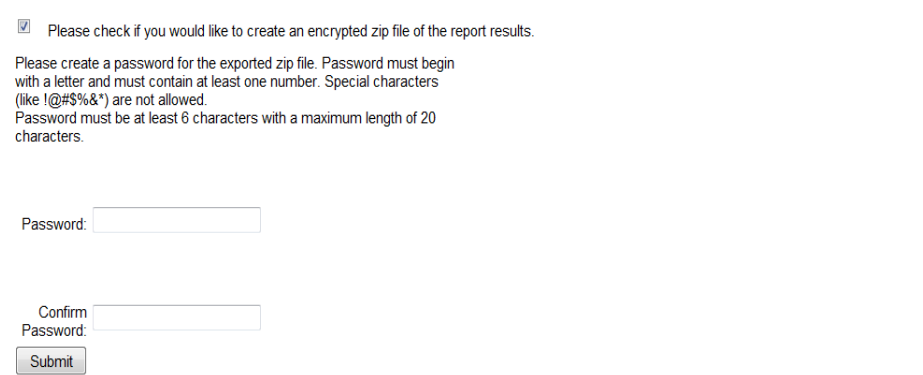
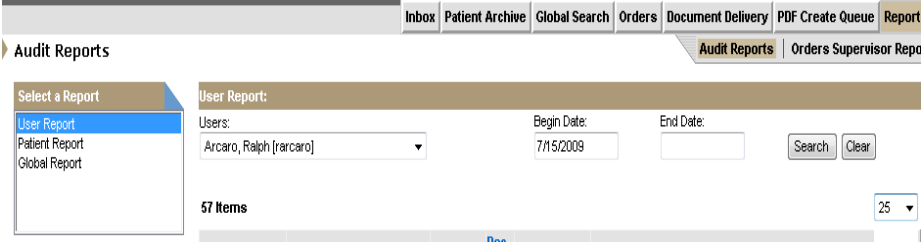
13	Select the Add another document icon to add another document to patient event.	
14	Position the mouse pointer over the Information icon to view Document and Event information.	
15	Select the intended documents and select Assigned Selected to assign document(s) to internal users.	
16	Select the internal user to assign the document(s) to and select Assign . Select Close to close window.	
17	Documents with assigned comments are indicated by a yellow Comments icon.  Position the mouse pointer over the Comments icon to view the most recent comment.	
18	Select the Comments icon  to add a new comment to a document. Enter comments in the Add Comment box and select Save Comment or Close to return without saving the comments.	

10 Report Module

10.1 Audit Reports

The following steps will guide the user through running patient, user and global audit reports. The following describes some of the basic audit reports.

User authorization is required for access to additional Reports.

Step	Action	Screen Shot
1	Select the Reports tab, and then Audit Reports .	
2	Users with Audit Reports privileges will be able to run reports for Active Users, Global Reports, Patient Reports and User Reports .	
3	Reports allow users to view all of the activity within their practice, and within Global Search, if applicable, for that particular patient, including searching, viewing, printing, comments and assign to.	
4	Enter a last name and a DOB in order to search for a report by patient.	
5	Select the highlighted patient name to view a patient report.	
6	The user can create reports that are password protected. Select the checkbox at the bottom of the report results to create an encrypted zip file . Select Export icon to export results without password protecting the report.	
7	Select users from the drop down list to execute reports within a practice. Enter a date range .	
8	Leave the End Date blank to provide a report on activity after a specific date. Leave the Begin Date blank for a report up to a specific date. Select Search .	

9	Select the number of rows to view on a page via the pull down selection in the upper right hand corner, just above the report results.	
10	<ul style="list-style-type: none"> Global Reports can be run on all users within a group practice. If the user is a member of a parent group, the user will see Global Search activity for all users in the group and sub-groups. <p>All Global Search activities are displayed.</p>	

10.2 Orders Supervisor Report

Step	Action	Screen Shot																																																								
1	Select Reports and then select Orders Supervisor .																																																									
2	The report shows order detail for orders that are inactive for over 1 day.																																																									
3	Select Run Report to execute a query.																																																									
4	Sort results view by selecting the column header.	<table border="1" style="font-size: small;"> <thead> <tr> <th>Hospital</th> <th>Service Location</th> <th>Order Id</th> <th>Practice</th> <th>Patient</th> <th>Document Type</th> <th>Test Requested</th> </tr> </thead> <tbody> <tr> <td>CHW Mercy Imaging Center</td> <td>Mercy Imaging Centers</td> <td>1386</td> <td>Test Practice1</td> <td>Patient2_Test</td> <td>Mercy Imaging</td> <td>PET/CT - Carmichael</td> </tr> <tr> <td>CHW Mercy Imaging Center</td> <td>Mercy Imaging Centers</td> <td>1387</td> <td>Test Practice1</td> <td>Patient3_Test</td> <td>Mercy Imaging</td> <td>X-Ray - Roseville</td> </tr> <tr> <td>CHW Mercy Imaging Center</td> <td>Mercy Imaging Centers</td> <td>1388</td> <td>Test Practice1</td> <td>Patient5_Test</td> <td>Mercy Imaging</td> <td>CT - Folsom</td> </tr> <tr> <td>CHW Mercy Imaging Center</td> <td>Mercy Imaging Centers</td> <td>1389</td> <td>Test Practice1</td> <td>Patient2_Test</td> <td>Mercy Imaging</td> <td>CT - Roseville</td> </tr> <tr> <td>CHW Mercy Imaging Center</td> <td>Mercy Imaging Centers</td> <td>1322</td> <td>Test Practice1</td> <td>Test,James</td> <td>Mercy Imaging Order</td> <td>X-Rays</td> </tr> <tr> <td>CHW Mercy Imaging Center</td> <td>Mercy Imaging Centers</td> <td>1384</td> <td>Test Practice1</td> <td>Patient3_Test</td> <td>Mercy Imaging</td> <td>MRI - Carmichael</td> </tr> <tr> <td>CHW Mercy Imaging Center</td> <td>Mercy Imaging Centers</td> <td>1385</td> <td>Test Practice1</td> <td>Patient2_Test</td> <td>Mercy Imaging</td> <td>CT - Folsom</td> </tr> </tbody> </table>	Hospital	Service Location	Order Id	Practice	Patient	Document Type	Test Requested	CHW Mercy Imaging Center	Mercy Imaging Centers	1386	Test Practice1	Patient2_Test	Mercy Imaging	PET/CT - Carmichael	CHW Mercy Imaging Center	Mercy Imaging Centers	1387	Test Practice1	Patient3_Test	Mercy Imaging	X-Ray - Roseville	CHW Mercy Imaging Center	Mercy Imaging Centers	1388	Test Practice1	Patient5_Test	Mercy Imaging	CT - Folsom	CHW Mercy Imaging Center	Mercy Imaging Centers	1389	Test Practice1	Patient2_Test	Mercy Imaging	CT - Roseville	CHW Mercy Imaging Center	Mercy Imaging Centers	1322	Test Practice1	Test,James	Mercy Imaging Order	X-Rays	CHW Mercy Imaging Center	Mercy Imaging Centers	1384	Test Practice1	Patient3_Test	Mercy Imaging	MRI - Carmichael	CHW Mercy Imaging Center	Mercy Imaging Centers	1385	Test Practice1	Patient2_Test	Mercy Imaging	CT - Folsom
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11 System Downtime Access

This section will provide users with instructions for using the HIE in a system outage, upgrade or downtime at a hospital.

11.1 Downtime Log In

Step	Action	Screen Shot
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<p>1</p>	<p>Select the downtime hyperlink provided by the hospital.</p> <p>Enter domain username and password.</p> <p>Select Logon.</p>	
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11.2 Downtime Patient Search

Step	Action	Screen Shot
<p>1</p>	<p>During Downtime, users can search for patients and display patient medical records by referring to prior sections Patient Archive and Global Search for detailed user instructions.</p>	
<p>2</p>	<p>View the Patient Summary while in the patient's Document Tree.</p> <p>Select the Patient Summary icon located in the top right corner of the Document Tree Page.</p> <p>Select the red X to close the page.</p>	

11.3 Downtime Patient Summary

Step	Action	Screen Shot										
<p>1</p>	<p>Display patient information by selecting the Patient Summary icon.</p>	<table border="1"> <thead> <tr> <th>Last Name</th> <th>First Name</th> <th>Middle Name</th> <th>DOB</th> <th>SSN</th> </tr> </thead> <tbody> <tr> <td>MMDTESTNB</td> <td>INPATIENT</td> <td>MN</td> <td>3/7/1985</td> <td></td> </tr> </tbody> </table>	Last Name	First Name	Middle Name	DOB	SSN	MMDTESTNB	INPATIENT	MN	3/7/1985	
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<p>2</p>	<p>The Patient Summary contains patient key Demographic information.</p>	<p>Patient Summary</p> <p>INPATIENT MMDTESTNB</p> <p>Gender: M DOB: 03/07/1985 SSN: [Edit]</p> <p>Home Phone: 2222222222 Address: 555 NEW ROAD SACRAMENTO, CA 95829</p>										
<p>3</p>	<p>The Patient Summary contains the Medical Record Number.</p>	<p>Medical Record Numbers</p> <table border="1"> <thead> <tr> <th>Patient MRN</th> <th>Facility</th> <th>Last Visit</th> </tr> </thead> <tbody> <tr> <td>NBMRN001</td> <td>Mercy General Hospital</td> <td>5/20/2011 10:45:02 AM</td> </tr> </tbody> </table>	Patient MRN	Facility	Last Visit	NBMRN001	Mercy General Hospital	5/20/2011 10:45:02 AM				
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6	If the Face Sheet is more than 90 days old (some sites configured at 120 days or more), position the mouse over the icon will display the message, Expired face sheet.																																																																																		
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	Select Close .		<input type="button" value="Print"/>	<input type="button" value="Go Back"/>	<input type="button" value="Close"/>	
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