

UPHIE Training Guide

Navigation

Menu Bar

- User welcome
- Vault Selection – Home Default Vault
- Data Access - HIE
- Patient search: Quick & Community
- Expandable headers
 - Patient Lists, Work Baskets, Secure Messaging, Links, Customize, Tools
 - Help, Clear, Lock, Log Out

Tabs


- Holding area that retains information from Menu Bar
 - **PL: Patient List(s)** Displays the active **Patient List** Search Results, or the one you have chosen from the **Menu Bar**
 - **PC: (Patient Chart)** – Displays the patient chart chosen from the active **Patient List** in the **PL** tab or the patient chart obtained from the **Search Patients** box in the **Menu Bar**.
 - **WB: (Work Baskets)** – Displays **Reminders** and **Folders** selected from the Menu Bar
 - **MG (Messaging)**: Displays Inbox messages
 - **Adm (Administration)** – Displays administrative tools selected from the Menu Bar under the header **Tools**

Patient Chart

Accessing via search

- **Quick** (your Patients) **vs Community** (HIE)
- **Medical Record Number**
- **Patient name:**
 - **Partial format:** Last name, First Initial (Smith, J)
 - **Full format:** Last name, first name (Smith, John) or First and Last Name (John Smith)
- Click on MRN to view patient clinical data
 - HL7 Data
 - CareExchange Query
 - CCD – Continuity of Care Document Search
- Community Search: Reveals
 - Assured Matches and Potential Matches
 - Vaults contributing data
 - Alias

Patient Demographics

-  Patient ICON - Color coded to signify change in status
- Click to view demographic information detail

Clinical Results > Clinical History

- Reverse chronological list of all patient documentation

- Ability to:

1. Search chart documents

- **Body:** Enter query, click **Search**
- **Title:** Enter document name in field. Click search. Document(s) with that title display
- **Author :** Enter author's name in field .All documents authored by that user display

2. Select specific categories using key command All/My Filters

All: Patient documents

My: User authored document

- From **Clinical History** default view of **All** documents
- Click **My** to display only documents authored by user

3. View document(s)

- Single:
 - Click on a document to view
 - Frame pulls up that document
- Multiple:
 - Check the box next to multiple documents
 - Click Show
 - Documents display

Labs

- Displays Lab Results by Categories
- Available views with ability to select user specific default view
 - Grid (default)
 - Excel
 - Expanded (example shown)
 - Spread
 - Grid view 2
 - Excel view 2
- Option to set a date range
- Out of range values flag as red in color
- View comments (highlighted in Blue)
- Graph individual labs
- Graph trends
- 1. From Patient Chart view select **Clinical History**
- 2. Click **Labs**

3. Click on a category to display history (some labs have sub categories)
4. Hover on a lab value to display units, reference ranges, comments and ordering provider
5. Click **test name** to graph
6. Click on Test Set Name (*Chemistry*) to graph multiple tests
7. Select **Set a Lab Date Range**
 - Manual Select – utilize the calendar to select a date range
 - Quick Select – choose from several options listed
8. Click **Submit**

Fast Labs

- Reverse chronological lab history
- View values, units, reference ranges and comments
- Out of range values flag as red in color
- Show trends
- Graphing capabilities for Results from same vault
- Displays ordering physician
- Categorize by lab name
- 1. From Patient Chart click Clinical Results
- 2. Click Fast Labs
- 3. Date range will display either 3, 6, or 12 months
 - a. To change date range default go to Customize->Preferences
- 4. Click Previous or Next to go between date ranges
- 5. Click Unit & Ranges to display information within fast labs
- 6. Click on a lab value to display trend window
- 7. Click Graph icon to produce a graph-same vault

History > Visits

- Account related Visits
- Quick View of patients Visit History – Pt Type
- Click on Account # to Account specific info & data
- Sort capability: checkmarks

Procedures/Diagnoses

- View Procedure codes & Diagnostic Codes

Immunizations

Medications

Summaries > Patient Summaries

- View Allergies

Actions > New Reminder

- Create a Reminder

Patient Lists

Outpatient Lists

ED Lists

- Select from available ED Units
- Filter using a Dashboard

Inpatient Lists

- Folders containing all user created inpatient lists.

My Inpatient Lists:

- Inpatient lists by Beds, Location, Service, Attending and Group Census.

Rounding List

- Vault specific
- Folder containing provider attending list.
- List defaults for provider login, may customize & add additional providers

Additional Patient Lists

Recent Lookups

- Displays recently viewed patient charts
- Holds up to 75 medical record numbers
- Displays in reverse chronological order
- Displays last accessed time stamp

My Additional Lists

- Folder containing all user owned and granted patient lists

Manage Lists

• Manage Patient Lists

- Create a custom list of patients
- Create an outpatient list by:
- Create an Inpatient Patient List by: Beds, location, Service, Provider, Group Census
- Automatically import pts. By provider or location to Patient List
- Automatically copy pts b/w Pt. Lists

• Manage Rounding List

Create an Inpatient List by Attending Provider(s)

Work Baskets

- View Reminders and documents stored in personal Folders

Secure Messaging

- Settings *
 - Sharing
 - Publish to HPD with location and specialty
 - Receive e-mail notification
 - Share inbox
 - Folders [Create your own]
 - Auto-Forwarding Rules
- New Message
 - To: and CC: - ability to send messages to CarAlign Users within your Vault & Other Vaults and providers in the Healthcare Provider Directory (HPD)
 - Address Book ...local addresses (vault only) and external addresses (HPD/HISP)
 - Upload documents
 - Attach individual Clinical Data documents from Carealign or entire Patient Summary
- Standard Folders
 - Inbox
 - Sent
 - Archive

Links

- Access web based links with the ability to customize

Customize – Personalize settings:

- Preferences - Personalize settings.
- Actions
- Columns

Tools

- Change Password
- Security Questions
- Access administrative tools based on permissions

Notes:

