

1 Authorized User Training Guide

2 HealtheConnections: myConnections

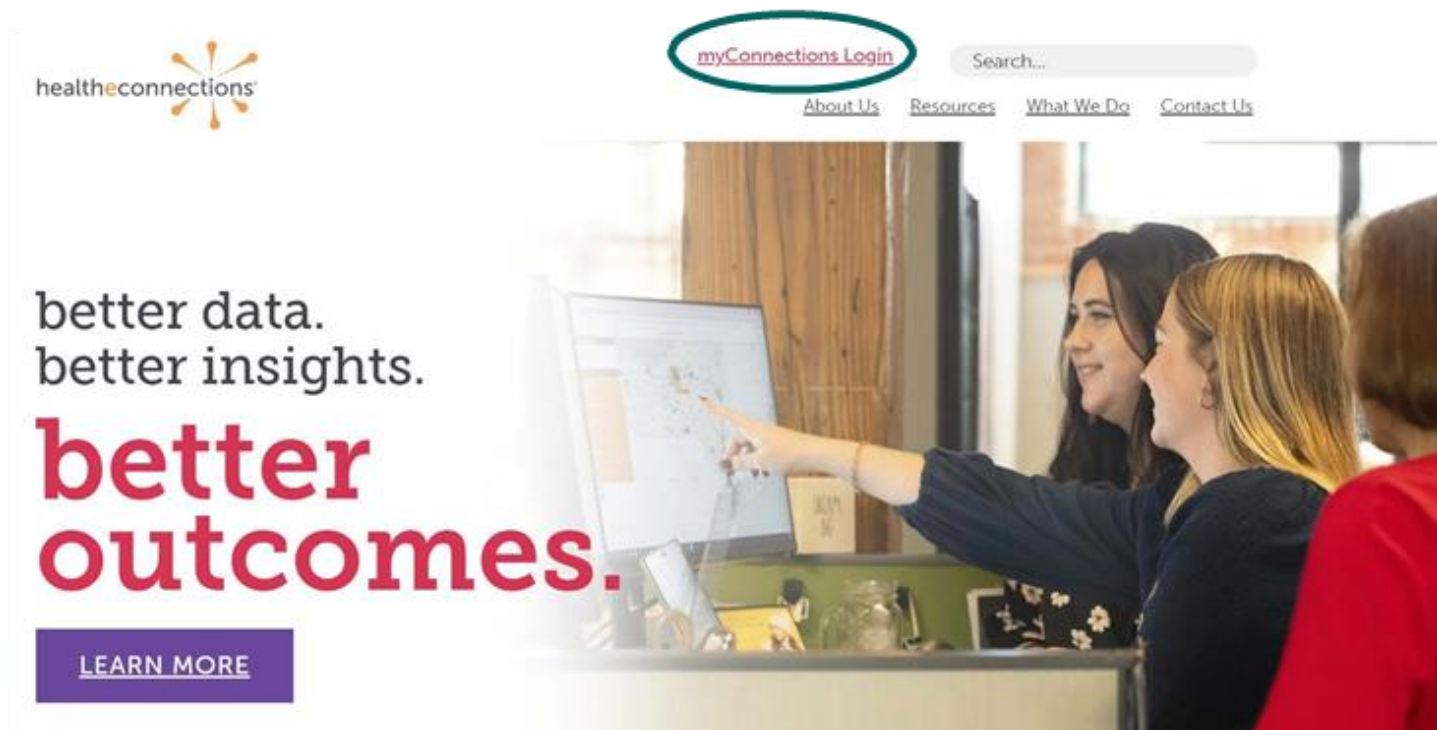
With myConnections, HealtheConnections Authorized Users can:

- Access our services including:
 - Patient Lookup
 - Direct Mail
 - Provider Directory for Direct Mail
 - myAlerts
 - myReferrals
 - myResults
 - myData
- Audit Reports
- Access training materials and forms
- Get updates on what's new with HealtheConnections
- Check for updates or outages
- Access our Participant Map
- Request assistance from our Support Team

In this manual, we will focus on Patient Lookup services. User Guides are also available for the other listed services.

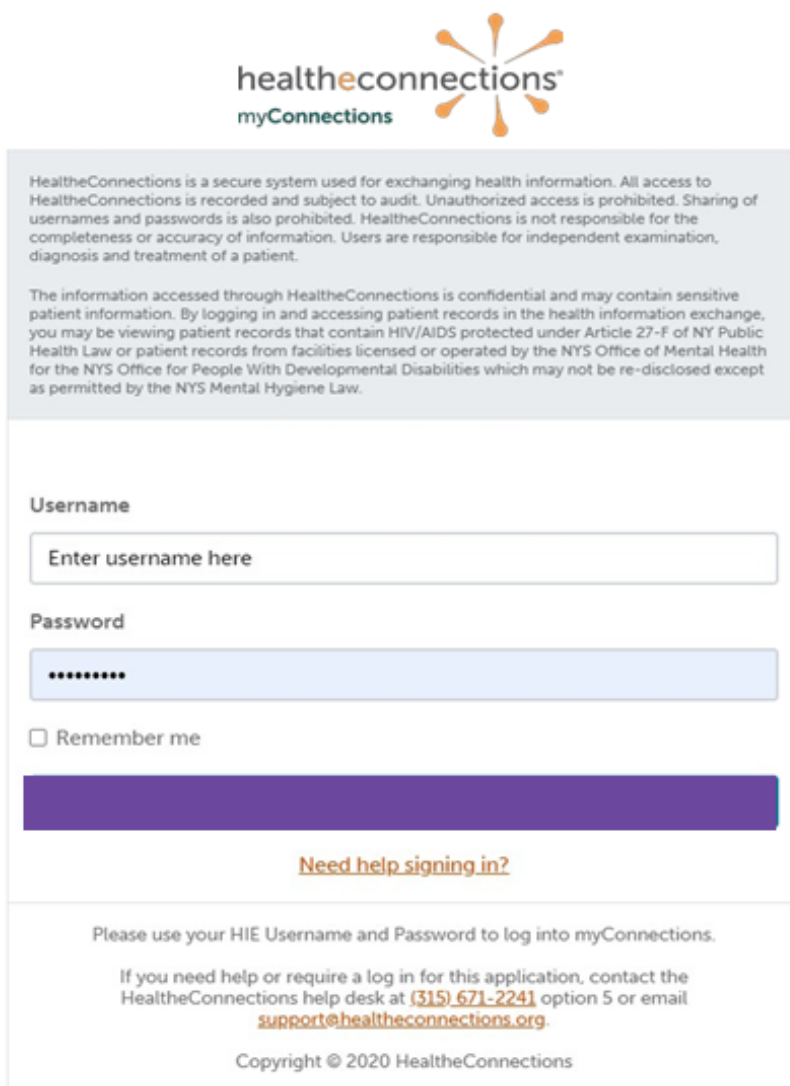
3 Accessing myConnections

You can access myConnections from our website: <https://www.healthconnections.org>.



Alternatively, in your Internet browser at <https://hie.healthconnections.org>.

4 Logging into myConnections



The screenshot shows the login interface for myConnections. At the top is the HealtheConnections logo. Below it is a disclaimer paragraph. The login section includes fields for Username and Password, a 'Remember me' checkbox, and a 'Log In' button. A link for 'Need help signing in?' is also present. At the bottom, there is contact information for the help desk and a copyright notice.

healtheconnections®
myConnections

HealtheConnections is a secure system used for exchanging health information. All access to HealtheConnections is recorded and subject to audit. Unauthorized access is prohibited. Sharing of usernames and passwords is also prohibited. HealtheConnections is not responsible for the completeness or accuracy of information. Users are responsible for independent examination, diagnosis and treatment of a patient.

The information accessed through HealtheConnections is confidential and may contain sensitive patient information. By logging in and accessing patient records in the health information exchange, you may be viewing patient records that contain HIV/AIDS protected under Article 27-F of NY Public Health Law or patient records from facilities licensed or operated by the NYS Office of Mental Health for the NYS Office for People With Developmental Disabilities which may not be re-disclosed except as permitted by the NYS Mental Hygiene Law.

Username

Enter username here

Password

.....

☐ Remember me

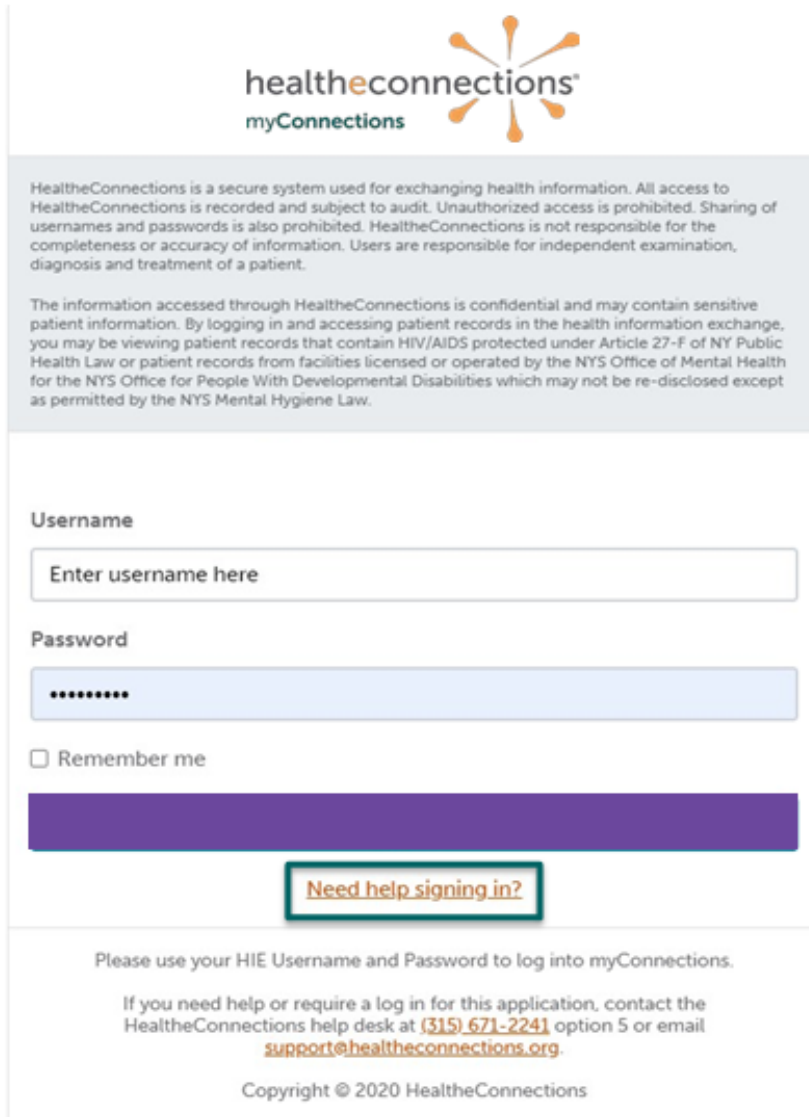
[Need help signing in?](#)

Please use your HIE Username and Password to log into myConnections.

If you need help or require a log in for this application, contact the HealtheConnections help desk at [\(315\) 671-2241](tel:3156712241) option 5 or email support@healtheconnections.org.

Copyright © 2020 HealtheConnections

Type your HealtheConnections Username and Password into the appropriate fields and click **Log In**.



The screenshot shows the login interface for the HealtheConnections myConnections system. At the top, the logo consists of the text "healtheconnections" in a sans-serif font, with "myConnections" in a smaller font below it, and an orange starburst icon to the right. Below the logo, there are two paragraphs of text. The first paragraph states that the system is secure and that access is recorded and audited. The second paragraph states that the information is confidential and may contain sensitive patient information. Below the text, there are two input fields: "Username" with a placeholder "Enter username here" and "Password" with a masked password "*****". Below the password field is a checkbox labeled "Remember me". Below the checkbox is a solid purple rectangular button. Below the button is a link "Need help signing in?" enclosed in a green rectangular box. Below the link, there is a paragraph of text providing instructions on how to use the HIE Username and Password to log into myConnections. Below this text is another paragraph providing contact information for the help desk, including a phone number and an email address. At the bottom, there is a copyright notice.

healtheconnections®
myConnections

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Username

Enter username here

Password

☐ Remember me

Need help signing in?

Please use your HIE Username and Password to log into myConnections.

If you need help or require a log in for this application, contact the HealtheConnections help desk at (315) 671-2241 option 5 or email support@healtheconnections.org.

Copyright © 2020 HealtheConnections

If you forgot your password, click “Need help signing in?” You will receive an email from noreply@okta.com, which may go to your Junk folder. If it is not in your Junk folder, contact our Support team at support@healtheconnections.org.

If you do not currently have a myConnections account contact HealtheConnections support at support@healtheconnections.org or 315.671.2241 x 5 for your credential.

5 myConnections

The screenshot shows the myConnections dashboard interface. Callouts point to the following elements:

- Navigation Bar:** Located at the top, containing links for Home, Training & Documents, Reports, Marketing & Media, and Contact Us.
- Username and Log Out:** Located in the top left, showing the user's name and a log out button.
- Interactive Participant map and Data Contribution table:** Located in the center, showing a map of New York and a table of data contributors.
- Badges:** Located on the left side, showing a list of badges and a "MEET OUR NEW HIE PARTICIPANTS" section.
- Notices:** Located in the center, showing a list of notices with color-coded icons (red, orange, blue, green).
- News:** Located at the bottom, showing a video of Dr. David Kelly, MD, discussing improving workflow with HealtheConnections.

Key statistics displayed on the dashboard include:

- 260,300 unique patients accessed per month
- 270,000 received per month

Notices are front and center within myConnections under the links to our **Participant Map** and **Data Contributors**. There's a color-coded system so you can easily see important updates and general information. Click on the notice to read it.

- ! Red - Critical notice
- ! Orange - Important news
- i Blue - General information
- + Green - Good news!

Your **account information** is right underneath your name in the top left-hand corner. This includes your organizations, RHIO Administrator contacts, and login dates.

News displays the most recent news from the HealtheConnections website (www.healthconnections.org).

6 Service Badges

To rearrange the order of your service badges, scroll to the bottom of the list of services and click the **Reorder Applications** button.

The screenshot shows the top of the user interface with the text "welcome back Christina Carroll!" and "MY ACCOUNT (+)". Below this is a list of three service badges: "Patient Lookup (DEMO)", "Community Referrals v2 (DEMO)", and "myData (Demo)". At the bottom of the list is a button labeled "Reorder Applications" with a four-pointed star icon. A callout box on the left points to this button with the text "1. Click on the **Reorder Applications** button". Another callout box on the right points to the list of badges with the text "2. Drag and drop each badge to order to your preferences."

The screenshot shows the same user interface as the previous one, but the list of service badges has been rearranged: "Community Referrals v2 (DEMO)", "myData (Demo)", and "Patient Lookup (DEMO)". At the bottom of the list is a button labeled "Done Reordering" with a checkmark icon. A callout box on the right points to this button with the text "3. Click on **Done Reordering** button to save your preferences".

7 Navigation Bar



HealthConnections logo:

To navigate back to the home page, click on the HealthConnections logo.

Training:

Click the link to access training documents, including reference sheets, training guides, and any user forms.

Reports:

A “report” is anything that might be generating a specific report for you, for example, our COVID-19 Lab Results Report or Audit Reports. Reports that are available to you will be displayed here in a convenient dropdown list.

Marketing:

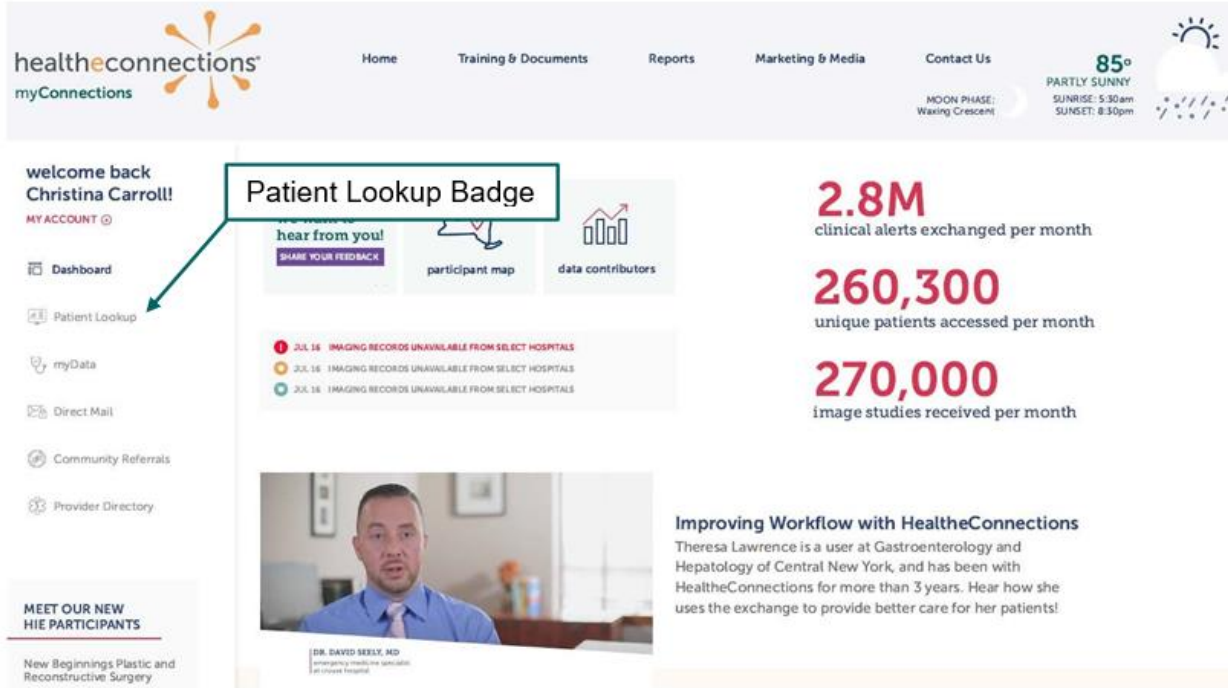
Here you will find information on each of our services and much more. This includes video and sheets that are patient-facing to be used within your office!

Contact us:

Click on "Contact Us" to get in touch with our Support team with your technical questions or feedback.

8 Searching for Patients – Patient Lookup

The **Patient Lookup Badge** will navigate you to the patient query screen.



healthconnections[®] myConnections

Home Training & Documents Reports Marketing & Media Contact Us

85° PARTLY SUNNY
MOON PHASE: Waxing Crescent
SUNRISE: 5:30am
SUNSET: 8:30pm

welcome back Christina Carroll!
MY ACCOUNT @

Dashboard Patient Lookup myData Direct Mail Community Referrals Provider Directory

Patient Lookup Badge

hear from you!
SHARE YOUR FEEDBACK

participant map data contributors

IMAGING RECORDS UNAVAILABLE FROM SELECT HOSPITALS

2.8M clinical alerts exchanged per month

260,300 unique patients accessed per month

270,000 image studies received per month

Improving Workflow with HealtheConnections
Theresa Lawrence is a user at Gastroenterology and Hepatology of Central New York, and has been with HealtheConnections for more than 3 years. Hear how she uses the exchange to provide better care for her patients!

DR. DAVID SEXLY, MD
Emergency Medicine Specialist
at Christus Hospital

MEET OUR NEW HIE PARTICIPANTS
New Beginnings Plastic and Reconstructive Surgery

If you work at more than one organization, you will see *multiple* **Patient Lookup** badges. Click the badge for the organization for which you are accessing the patient.

Advanced Filter: Patients

Clear Search Criteria

Search Requirements:

- Last Name and Date of Birth
- or
- Patient ID

Reason For Search

Search Reason*

Treatment

Demographic Search

Last Name*

First Name

Street 1

City

Country

Gender

Date of Birth*

Street 2

State

ZIP Code

Identifier Search

Patient ID*

Insurance Plan ID

Phone Number

Results

100

Submit

Cancel

There must be a “Reason” selected in order to execute a search. The reason automatically defaults to “Treatment;” however, you can choose other options by clicking the down arrow:

- Emergency Treatment
- Treatment
- Manage Consent
- Quality Improvement Activity

You may search for the patient by using either: **Demographic Search** using “Last Name” and “Date of Birth” or **Identifier Search** using the “Patient ID” which is the patient’s Hospital Medical Record Number (MRN).

The required fields are marked with asterisks. You can further refine your search by filling out the other data elements; however, they are not required.

My Results: **Patients** Advanced Search

Patients

1 item found. Date of Birth: 10/20/1953 Last Name: PATIENTONE [Clear Search](#)

<input type="checkbox"/>	Name	Date of Birth	Gender	Address	City	State	Postal	Voice #	SSN
<input type="checkbox"/>	Patientone, Test	10/20/1953	Male	123 MAIN ST	ANYWHERE	NY	13367	(315) 555-1212	***-**-1212 ***-**-6789 ***-**-9105 ***-**-XXXX

Click on the desired patient.

If multiple patients with the same information are returned (e.g., they have the same last name and date of birth), the system will then display additional criteria (e.g., first name, address, gender, etc.) in order for you to choose your patient.

Click on the desired patient and the **Patient Summary** will be displayed, depending on the patient's consent for your facility.

To clear this search, click the **Clear Search** Button.

9 Consent- Emergency

Default or Emergency Only Access Screen

Patientone, Test Male 10/20/1953 (65 yrs) (HeC ID: 6012204)
 123 MAIN ST, ANYWHERE, NY 13367

You Do Not Have Consent To View This Patient's Data
 Consent in Effect: User Provider Group

This patient has consent data you currently do not have access to view.

You can access clinical and demographic information
 Access will be audited
 Break the Glass

You can manage consent
 Consent Information

Consent Type	Applied To	Authoring Facility
Emergency	Organization: Test Practice 2	Group: Test Practice 2

If the patient does not authorize a change in their consent, you are unable to view the record any further. To search for a new patient, click the **Back to List** request on the **Patient Actions** tab.

Break the Glass is only available for select users. See your RHIO Administrator if you wish to have **Break the Glass** privileges in case of medical emergency.

10 Consent - Deny

Consent Value of "No"

TEST, PATIENT1 Unknown 01/01/1951 (62 yrs) (HHC ID: 3905154)
 109 S. Warren Street, SYRACUSE, NY 12303

This Patient Has Declined Access To Their Data

Patient's have the ability to opt-in or opt-out of HIE data sharing policies. In some cases, a patient may declare their data to be available only declared their information private. You will be required to "break the glass" to view this patient's data. Access to this patient's data will be au

You can manage consent

Consent Information

Consent Type	Active	Applied To	Authoring Facility	Location	Effective O
No	✓	Organization: HealthConnections	HealthConnections RHIO		04-25-2013

+ Add Consent

If patient consent is "No," you will not be able to access their records until the patient signs a new affirmative consent document.

If your organization is sharing medical records electronically with HealthConnections, adding consent may be automated through your EMR. Please check with your RHIO Administrator if you are unsure. If you are directed to add consent manually, please follow the next steps.

11 Adding Consent Value

To add consent manually, click the **Add Consent** button.

The screenshot shows the patient summary page for "Patientone, Test" (Male, 10/20/1953, 65 yrs, HeC ID: 00122, 123 MAIN ST, ANYWHERE, NY 13367). A yellow banner states: "You Do Not Have Consent To View This Patient's Information. Consent In Effect: User Provider Group. This patient has consent data you currently do not have access to view." Below this, it says "You can access clinical and demographic information. Access will be audited." and "You can manage consent. Consent Information." A table lists consent types (Emergency, Yes) and their status (Applied To, Organizational). A green box highlights the "+ Add Consent" button. A green arrow points from this button to the "Add Consent" modal window. The modal has fields for "Consent Type" (a dropdown menu) and "Effective On" (a date field set to 02/01/2019 with a calendar icon). At the bottom of the modal are "Submit" and "Cancel" buttons.

Select **Yes**, **No** or **Emergency**. Change the date if necessary. The date will default to today's date. Select the calendar or type in the date if it needs to be changed.

Click **Submit**.

Then, you will click "**Back to List**" to return to the Patient List. Click the same patient again and the patient's summary page will be displayed.

The screenshot shows the patient summary page for "Patientone, Test" (Male, 10/20/1953, 123 MAIN ST, ANYWHERE, NY 13367). On the left, under the "Patient Actions" section, the "Back to List" button is highlighted with a green box. On the right, there are tabs for "Summary", "More Patient Information", and "External Document".

12 Patient Lookup

Once you have selected the patient and consent has been indicated as affirmative, the Patient **Summary** page will be displayed.

My Results **Patients**

Patient » Patientone, Test

Patient Actions

- Back to List
- Download CCD
- Download CCDA CCD
- Download Summary PDF
- Configure Layout
- Show Next 180 Days of Data
- Show All Data
- Filter Displayed Items By Date

Patientone, Test Male 10/20/1953 (65 yrs) (H&C ID: 6012201)
123 MAIN ST, ANYWHERE, NY 13367

Data Limited to Last 180 Days

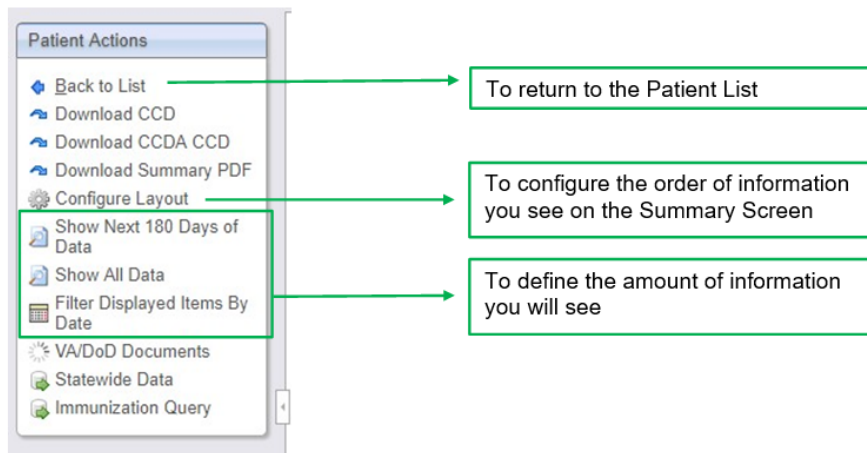
Summary More Patient Information External Document Search View All Images

Laboratories (0) Imaging (0)
No Laboratories to display

Transcriptions (0)
No Transcriptions to display

Ambulatory Encounters (0) More
No Ambulatory Encounters to display

Upon initial search, data will be limited to the last 180 days. If you would like historical data on the patient, you can click **Show Next 180 Days of Data**, **Filter Displayed Items by Date**, or **Show All Data**.

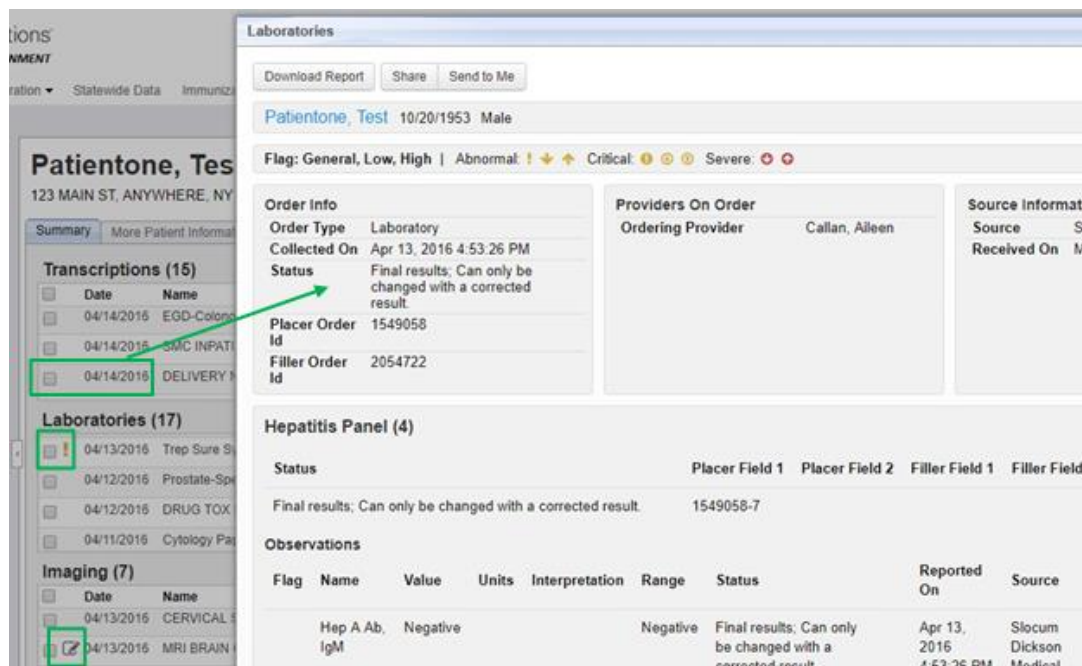


You will see information by **Name**, **Source**, and **Date** for each type of data. Information is defaulted to show in chronological order, with newest results first. Within each type of data, by clicking on the heading (Date, Name, Source) you can re-sort to your preference.

To access an item, click on the descriptor and it will open the document for your review. An **exclamation mark** in front of an item indicates an abnormal result.

A **pencil icon** mark in front of an item indicates a preliminary result.

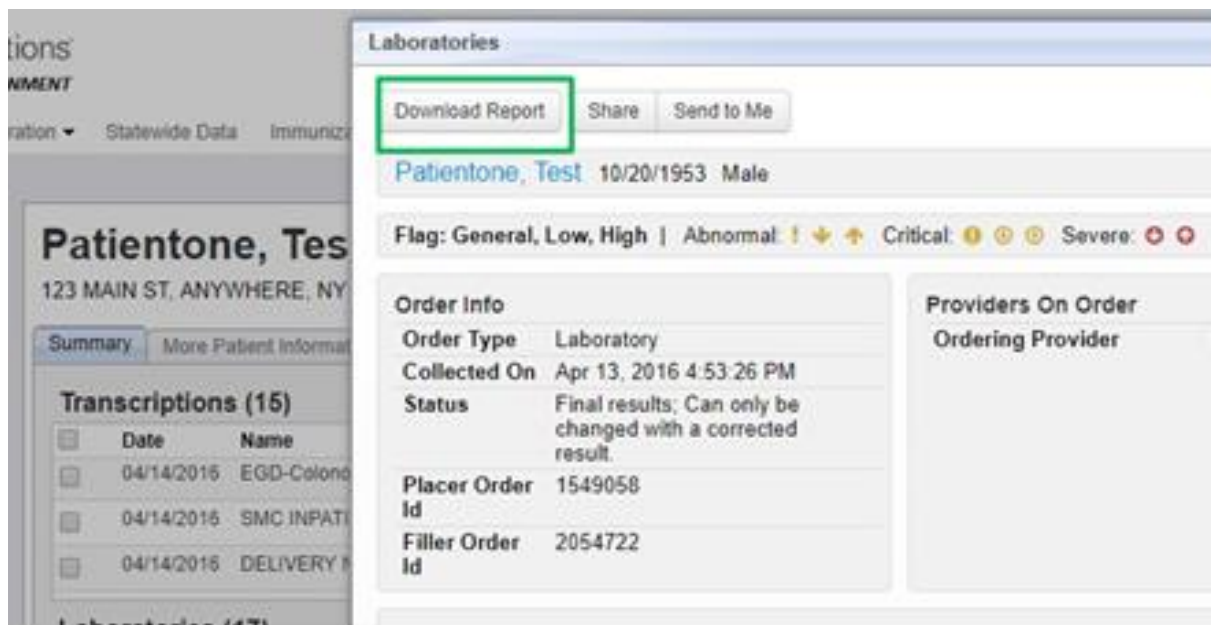
By **hovering** over an item, you can see via a pop-up screen, more information on that item including the source name, rather than the abbreviated identifier.



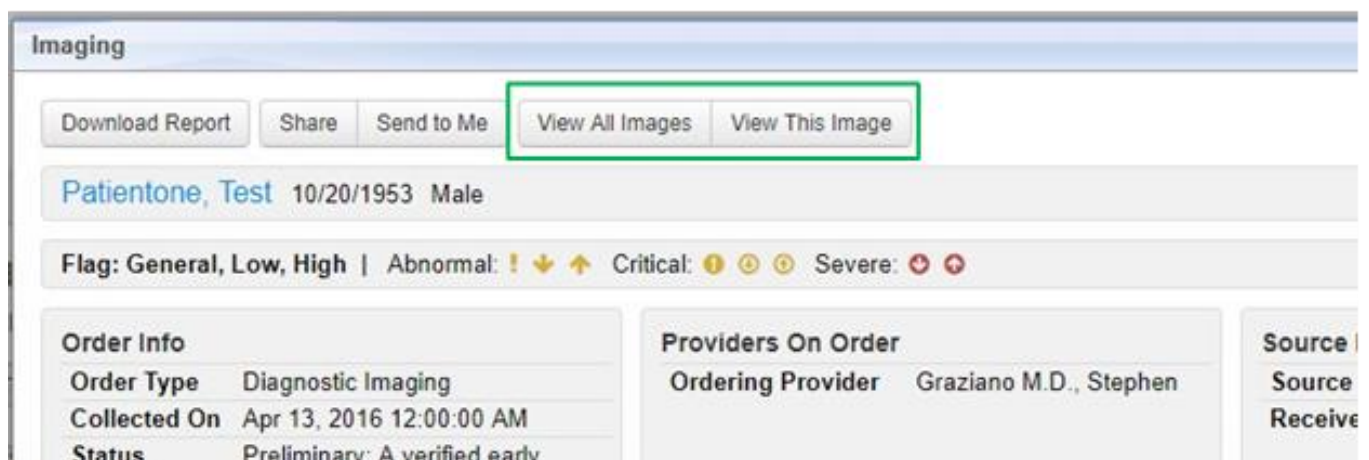
The screenshot shows the patient summary screen for 'Patientone, Test' (10/20/1953 Male). The left sidebar lists various data sections: Transcriptions (15), Laboratories (17), and Imaging (7). The main content area shows a detailed view of a laboratory test, including the following information:

- Order Info**: Order Type (Laboratory), Collected On (Apr 13, 2016 4:53:26 PM), Status (Final results; Can only be changed with a corrected result), Placer Order Id (1549058), Filler Order Id (2054722).
- Providers On Order**: Ordering Provider (Callan, Aileen).
- Source Information**: Source (Slocum Dickson Medical), Received On (Apr 13, 2016 4:53:26 PM).
- Hepatitis Panel (4)**: Status (Final results; Can only be changed with a corrected result), Placer Field 1 (1549058-7).
- Observations**: A table with columns for Flag, Name, Value, Units, Interpretation, Range, Status, Reported On, and Source. The table contains one row for 'Hep A Ab, IgM' with a value of 'Negative' and a status of 'Final results; Can only be changed with a corrected result'.

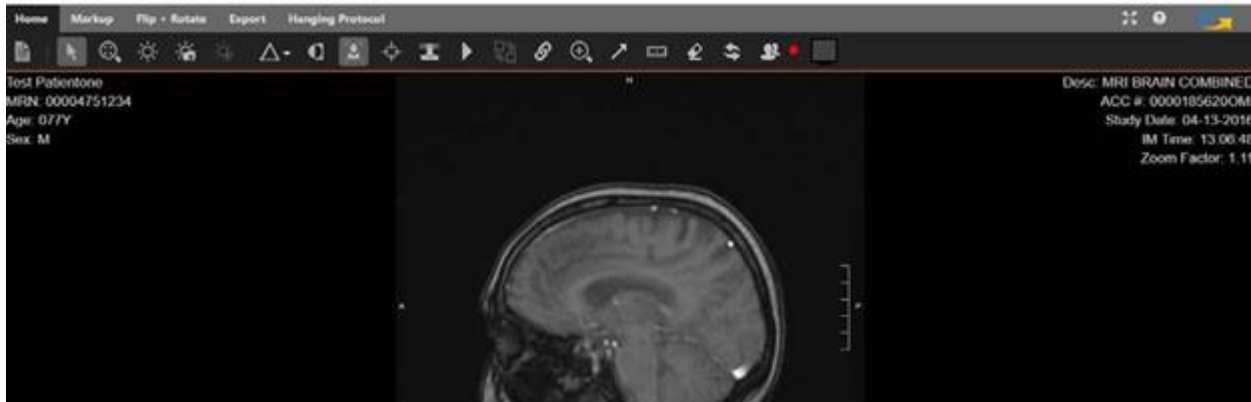
To download or print this document, select **Download Report**. Follow the prompts to print or download to a PDF document.



Imaging reports are available as well as the image itself if **View All Images** or **View This Image** is displayed. You can currently access X-Rays, CT scans, MRI, Sonogram images from many sources. You may receive a notice of the image being blocked. You must disable Pop-Up Blockers to **always allow** these images to load.



Refer to the Imaging guide for explanation of the navigational tools for this screen after selecting **View This Image**.



For **View All Images** you can see all imaging studies for this patient that are stored on the Source server.

Up to four can be selected to perform comparative studies.

HIE Imaging Worklist

Transfer to PACS

Transfer History

Available Studies for This Patient

	Status	MRN	Location	Study Date	Study Description
<input checked="" type="checkbox"/>		82123/1	Northern Radiology Imaging	04/13/2016	CERVICAL SPINE COMPLETE XRAY
<input type="checkbox"/>		00004751234	Oneida Medical Imaging Group	04/13/2016	MRI BRAIN COMBINED
<input checked="" type="checkbox"/>		20800123	Syracuse Orthopedic Specialists	04/12/2016	3 Phase Bone Scan
<input type="checkbox"/>		776123	Upstate University Hospital	03/11/2016	US OB FET AND MAT EVAL
<input checked="" type="checkbox"/>		15444XXXX	Upstate University Hospital	02/26/2015	US BILAT COLOR CARTOID
<input type="checkbox"/>		15444XXXX	Upstate University Hospital	02/06/2015	RIGHT XR LEG-TIBIA/FIBULA
<input checked="" type="checkbox"/>		111111	Crouse Radiology Associates	09/19/2013	CT BRAIN W/O CONTRAST

View Studies

This will open a screen with all selected studies for your review.

Documents section will provide you a summary of a particular provider's record up to the date listed on the document. Select the document you wish to view, **View as HTML** or **Download Original**. View will allow you to see a readable version of this document. **Download** will download the document in CCD format for consumption to your EMR.

Test Patientone
 Created On: April 14, 2016

Patient:	Test Patientone 123 Main St. Anywhere, NY, 13367 tel: +1(315)-555-1212		MRN: 2.16.840.1.1113883.3.227.99.6788.32035.0
Birthdate:	October 20, 1953		Sex: Male
Guardian:			Next of Kin:
Race:	Black Or African American		Ethnicity: Not Hispanic Or Latino
Language:	eng (preferred)		

Table of Contents

- [Exams](#)
- [Problems](#)
- [Family History](#)
- [Social History](#)
- [Allergies, Adverse Reactions, Alerts](#)
- [Medications](#)
- [Vital Signs](#)
- [Results](#)
- [Procedures](#)
- [Encounters](#)
- [Plan of Care](#)

Payers

Type	Date	Identification Numbers	Payment Provider	Subscriber
Medicare Primary		Policy Number: 434425246A	Medicare Upstate	Test Patientone
		PayID: 13282	PO Box 6189	
		Indianapolis, IN 46206		

To exit, Click the X at the top, right-hand corner.

13 More Patient Information

The **More Patient Information** tab will give you Demographic Information regarding your patient. If you are a Demographic Only access user, you will ONLY have access to this tab – no clinical information. Select the topic you wish to view by clicking on the heading.

Patientone, Test Male 10/20/1953 (65 yrs) (HeC ID: 6012201)
123 MAIN ST, ANYWHERE, NY 13367

Summary **More Patient Information** External Document Search View All Images

Data Limited to Last 100 Days

Demographic	Contact	Address
Name TEST PATIENTONE Date of Birth 10/20/1953 Gender Male	Phone (315) 555-1212 Alt. Phone (607) 272-7947 Fax Email Patientone.test@gmail.com	123 MAIN ST ANYWHERE, NY 13367 US

Other Information Advance Directives Consent Facilities Insurance Info Next of Kin Patient Aliases Providers Support Persons

Birth Place Albany, New York Marital Status Married Citizenship UNITED STATES Religion NONE Care Management	Driver's License 657 612 099 Race White Ethnicity Unknown Deceased <input type="checkbox"/> Time of Death
--	--

To search for Veterans Administration (VA), Department of Defense (DOD), other HIE's in NYS data (Statewide Data), select the External Document Search tab. A search was launched upon initial access of the Patient's medical record. If the patient has records in any of these external sources, records you will receive a result here. Click on the result to access.

Patientone, Test Male 10/20/1953 (65 yrs) (HeC ID: 6012201)
123 MAIN ST, ANYWHERE, NY 13367

Summary More Patient Information **External Document Search** View All Images

Search Criteria

Please submit an external document search to find documents for this patient. The details of this search will be audited, so only proceed if you have the proper authorization.

Retrieved Documents

Title	Type	Gateway	Service Dates	Author	Download
-------	------	---------	---------------	--------	----------

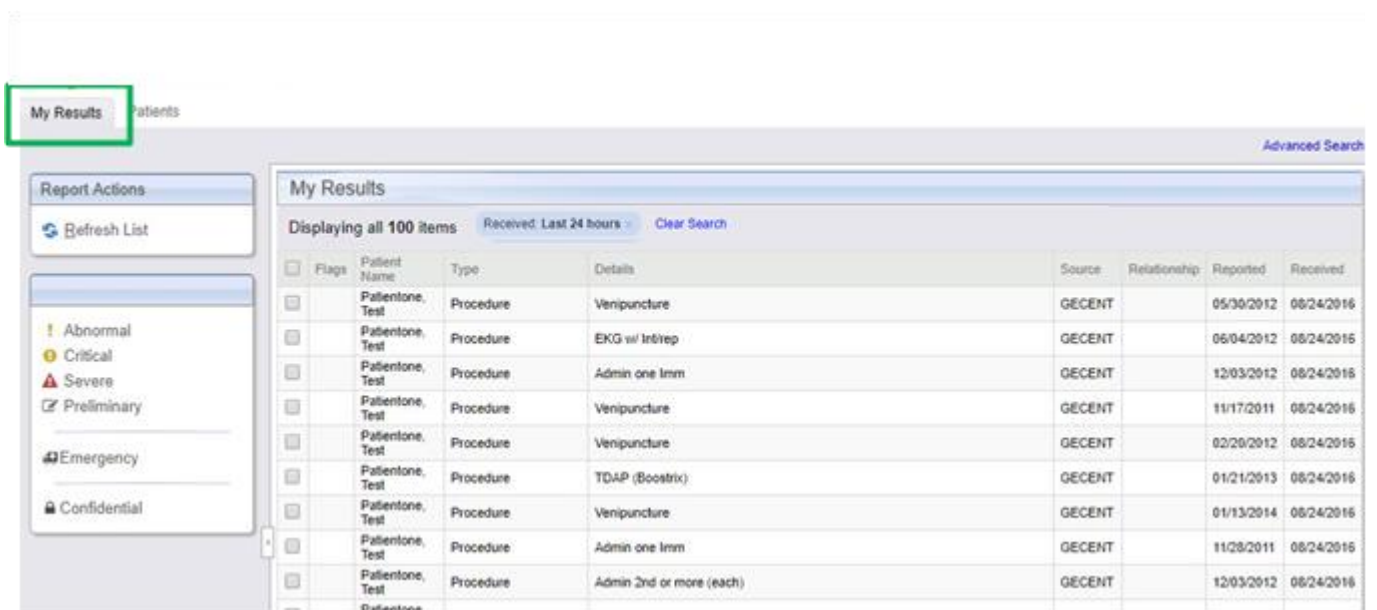
14 MyResults

If you are a named provider, or have been delegated by a named provider, you can receive your results via the **My Results** tab.

You will immediately see the results where you are named as the Ordering, Consulting, Referring, Admitting, Discharging, or other named resource within the previous 24 hours for any patient.

You do not need consent to view these records as you have a treating relationship with the named patient.

This is the same information you would see on the Patient Lookup Summary screen and can be accessed either way.



My Results patients

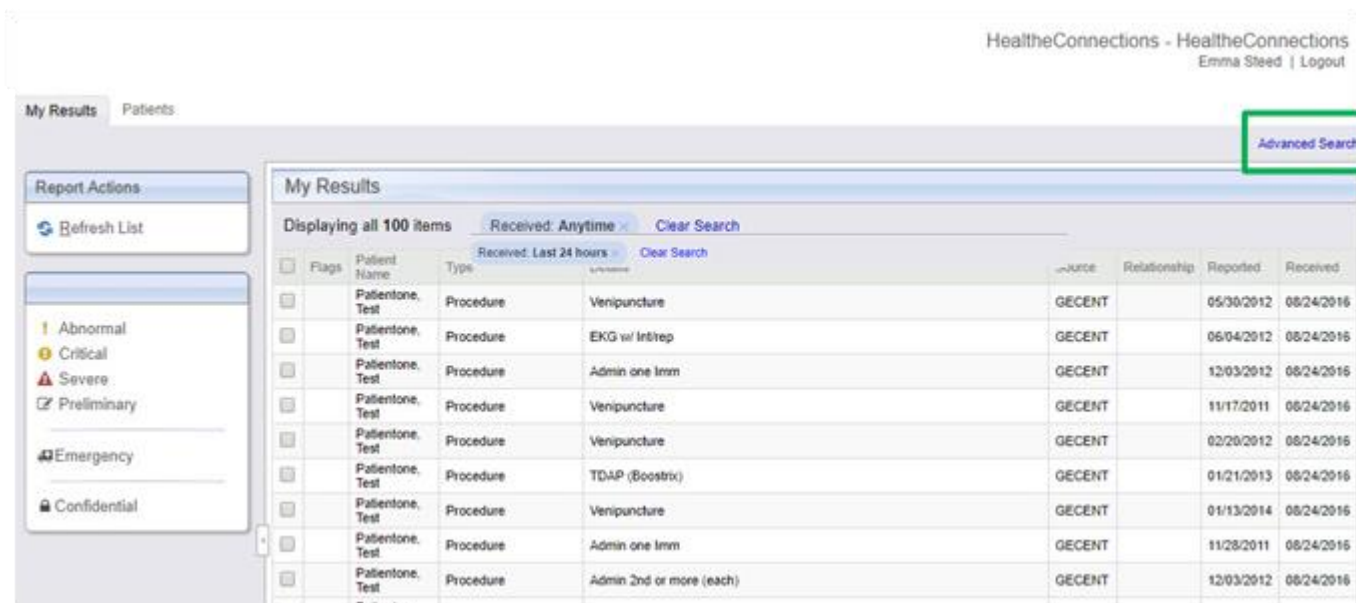
Report Actions
Refresh List

Abnormal
Critical
Severe
Preliminary
Emergency
Confidential

My Results
Displaying all 100 items Received: Last 24 hours Clear Search

Flags	Patient Name	Type	Details	Source	Relationship	Reported	Received
<input type="checkbox"/>	Patientone, Test	Procedure	Venipuncture	GECENT		05/30/2012	05/24/2016
<input type="checkbox"/>	Patientone, Test	Procedure	EKG w/ Int/rep	GECENT		06/04/2012	05/24/2016
<input type="checkbox"/>	Patientone, Test	Procedure	Admin one Imm	GECENT		12/03/2012	05/24/2016
<input type="checkbox"/>	Patientone, Test	Procedure	Venipuncture	GECENT		11/17/2011	05/24/2016
<input type="checkbox"/>	Patientone, Test	Procedure	Venipuncture	GECENT		02/29/2012	05/24/2016
<input type="checkbox"/>	Patientone, Test	Procedure	TDAP (Boostrix)	GECENT		01/21/2013	05/24/2016
<input type="checkbox"/>	Patientone, Test	Procedure	Venipuncture	GECENT		01/13/2014	05/24/2016
<input type="checkbox"/>	Patientone, Test	Procedure	Admin one Imm	GECENT		11/28/2011	05/24/2016
<input type="checkbox"/>	Patientone, Test	Procedure	Admin 2nd or more (each)	GECENT		12/03/2012	05/24/2016

If you would like to see beyond the previous 24 hours, click on the **Advanced Search** button to perform a more defined search.



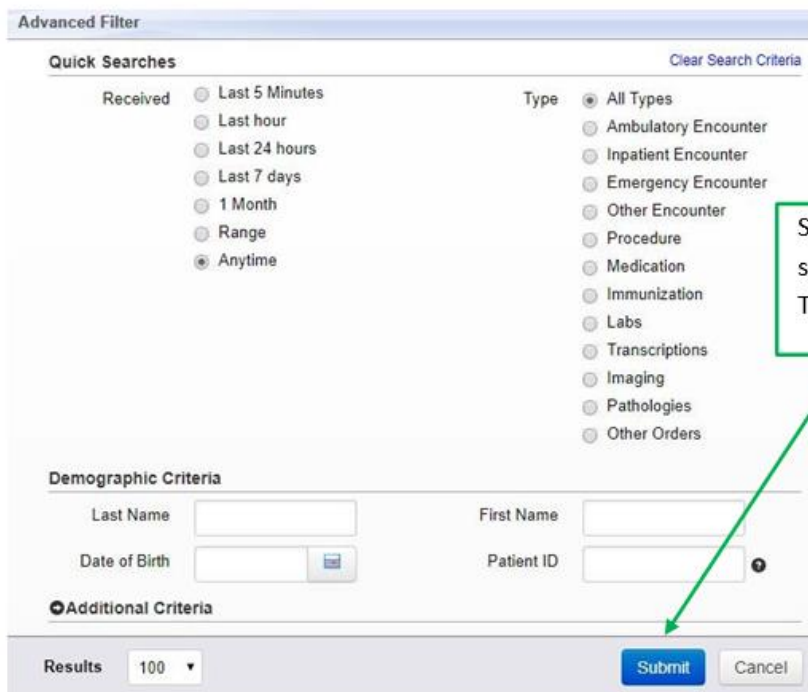
HealthConnections - HealthConnections
Emma Steed | Logout

My Results Patients

Report Actions
Refresh List

My Results
Displaying all 100 items Received: Anytime Clear Search

Flags	Patient Name	Type	Source	Relationship	Reported	Received
	Patientone, Test	Procedure	Venipuncture	GECENT	05/30/2012	08/24/2016
	Patientone, Test	Procedure	EKG w/ Int/rep	GECENT	06/04/2012	08/24/2016
	Patientone, Test	Procedure	Admin one Imm	GECENT	12/03/2012	08/24/2016
	Patientone, Test	Procedure	Venipuncture	GECENT	11/17/2011	08/24/2016
	Patientone, Test	Procedure	Venipuncture	GECENT	02/20/2012	08/24/2016
	Patientone, Test	Procedure	TDAP (Boostrix)	GECENT	01/21/2013	08/24/2016
	Patientone, Test	Procedure	Venipuncture	GECENT	01/13/2014	08/24/2016
	Patientone, Test	Procedure	Admin one Imm	GECENT	11/28/2011	08/24/2016
	Patientone, Test	Procedure	Admin 2nd or more (each)	GECENT	12/03/2012	08/24/2016



Advanced Filter

Quick Searches Clear Search Criteria

Received
☐ Last 5 Minutes
☐ Last hour
☐ Last 24 hours
☐ Last 7 days
☐ 1 Month
☐ Range
☒ Anytime

Type
☒ All Types
☐ Ambulatory Encounter
☐ Inpatient Encounter
☐ Emergency Encounter
☐ Other Encounter
☐ Procedure
☐ Medication
☐ Immunization
☐ Labs
☐ Transcriptions
☐ Imaging
☐ Pathologies
☐ Other Orders

Demographic Criteria
 Last Name First Name
 Date of Birth Patient ID

Additional Criteria

Results 100

Submit Cancel

Select the date frame and type of services you wish to filter the results. Then click **Submit** box.

15 Logging Out

For security purposes, you should always Log Out of your Authorized User account, rather than simply closing the application. Click on Sign Out and then close the application.

Form Reference

The below form is utilized in the configuration of Authorized User account.

Authorized-User-Certification-and-Application

The Authorized User Certification and Application form is utilized for new users requesting credentials for access. This form must be co-signed, and identity verified by a RHIO Administrator or HealtheConnections Community Engagement Specialist.