1 Authorized User Training Guide
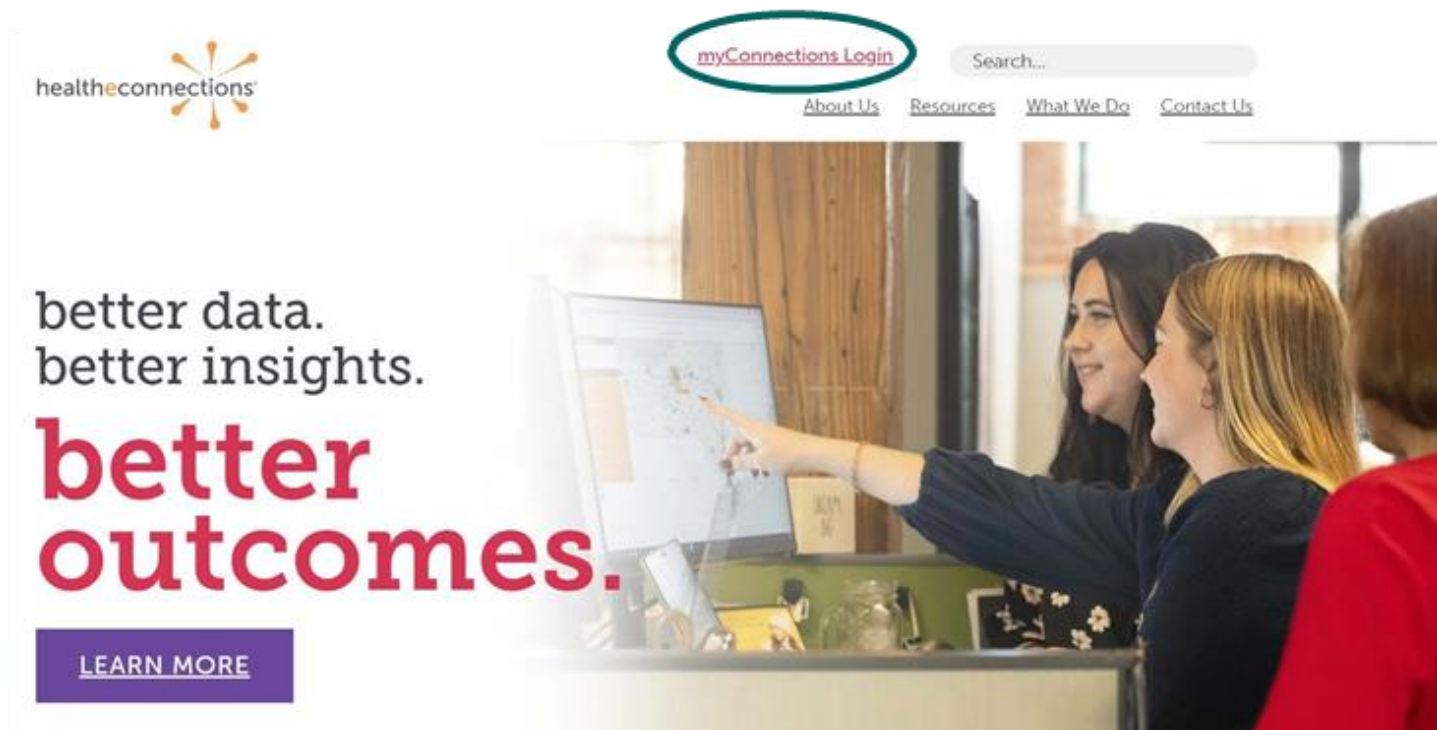
2 HealtheConnections: myConnections

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.
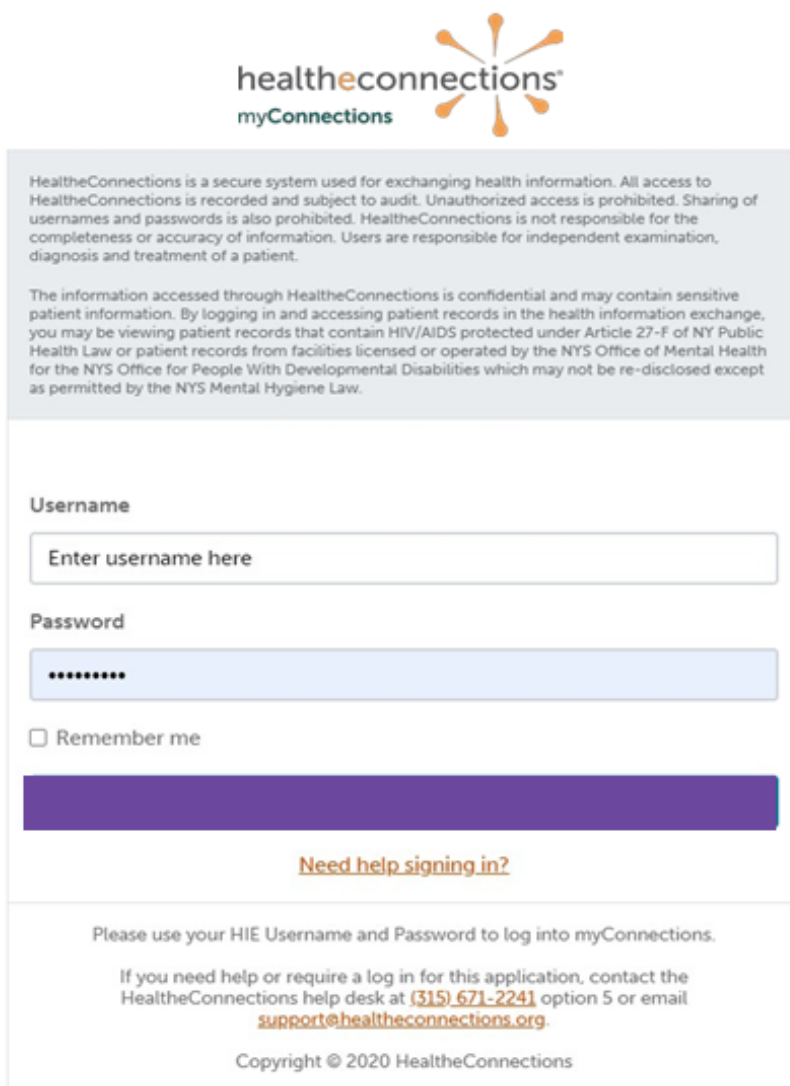
![healtheconnections logo]

3   Accessing myConnections

You can access myConnections from our website: **https://www.healtheconnections.org**.

Alternatively, in your Internet browser at **https://hie.healtheconnections.org**.

4 Logging into myConnections

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

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healtheconnections

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
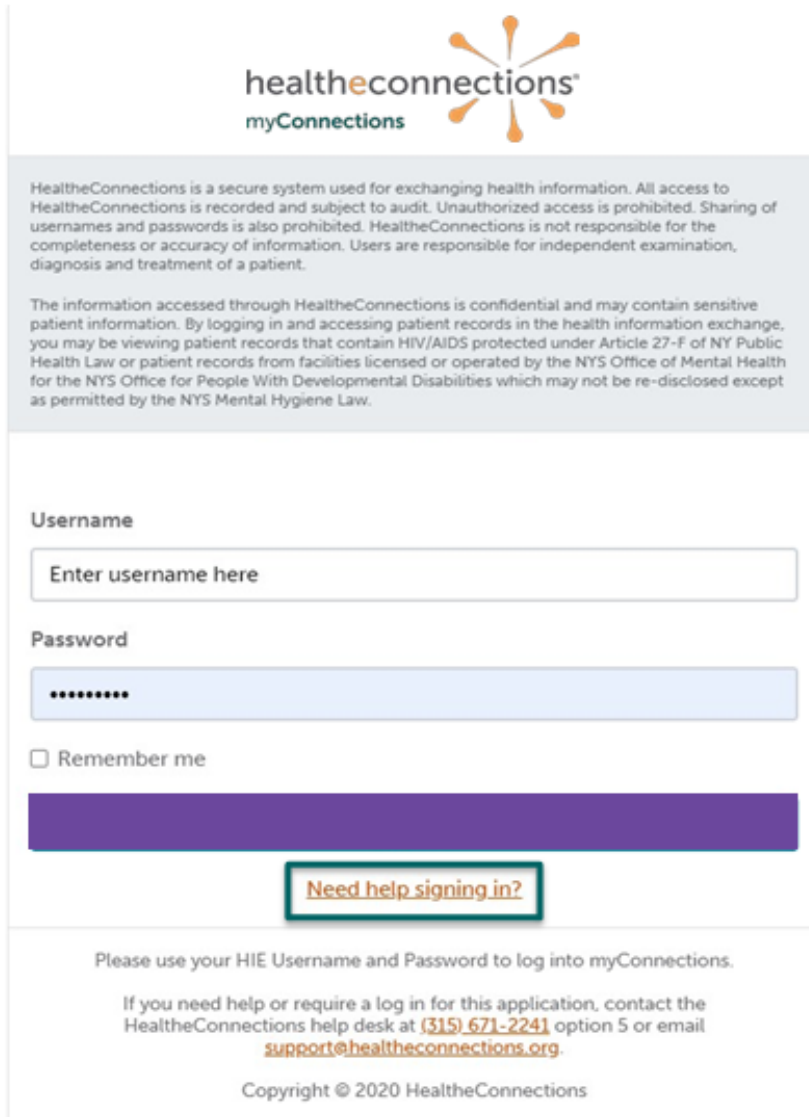
Enter username here

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 option 5 or email support@healtheconnections.org.

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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.*

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5   myConnections

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   🔵 Blue – General information
🟠 Orange – Important news   🟢 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.healtheconnections.org**).

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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.

1. Click on the **Reorder Applications** button

**welcome back
Christina Carroll!**

MY ACCOUNT ⊕

Patient Lookup (DEMO)

Community Referrals v2 (DEMO)

myData (Demo)

⊹ Reorder Applications

2. Drag and drop each badge to order to your preferences.

**welcome back
Christina Carroll!**

MY ACCOUNT ⊕

Community Referrals v2 (DEMO)

myData (Demo)

Patient Lookup (DEMO)

✔ Done Reordering

3. Click on **Done Reordering** button to save your preferences

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7 Navigation Bar

HealtheConnections logo:
To navigate back to the home page, click on the HealtheConnections 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.
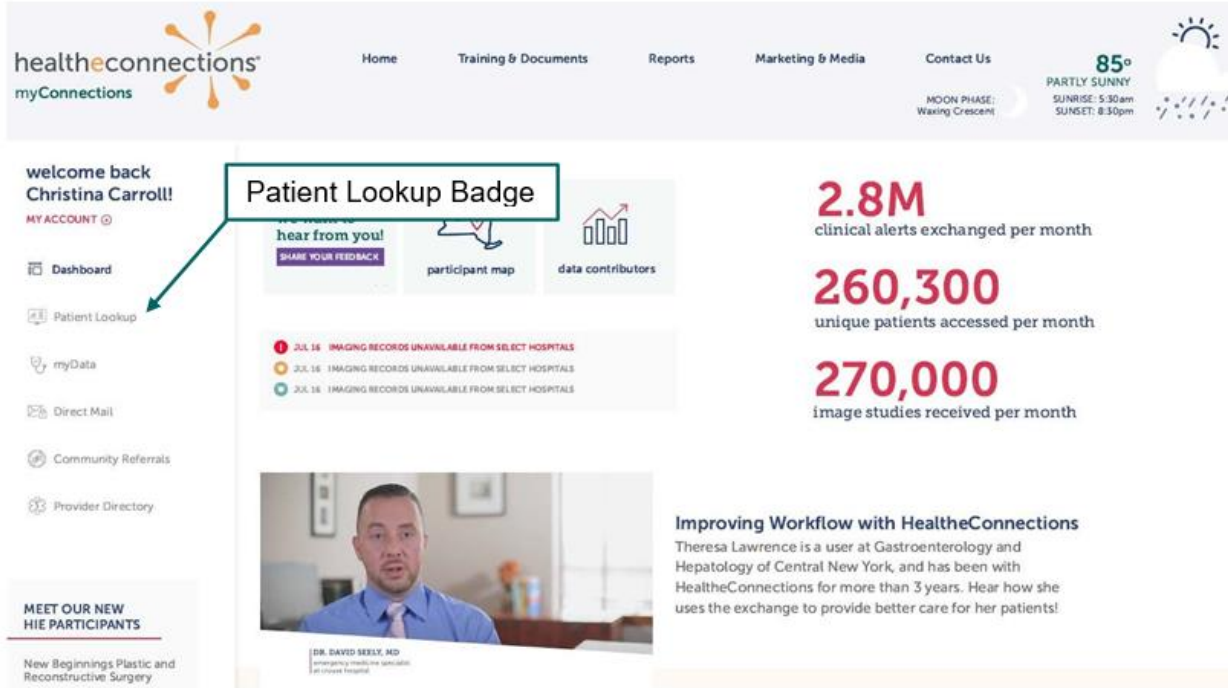
Marketing:
Here you will find information on each of our services and much more. This includes video and sheets that are patient-facing to be used within your office!

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.

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.

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.

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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.

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9   Consent- Emergency

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"

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 HealtheConnections, 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.

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.

![healtheconnections logo]

12 Patient Lookup

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

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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.**
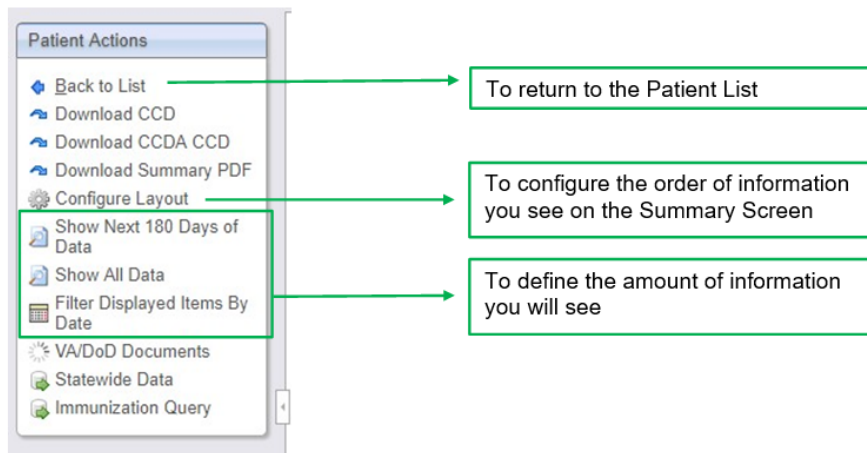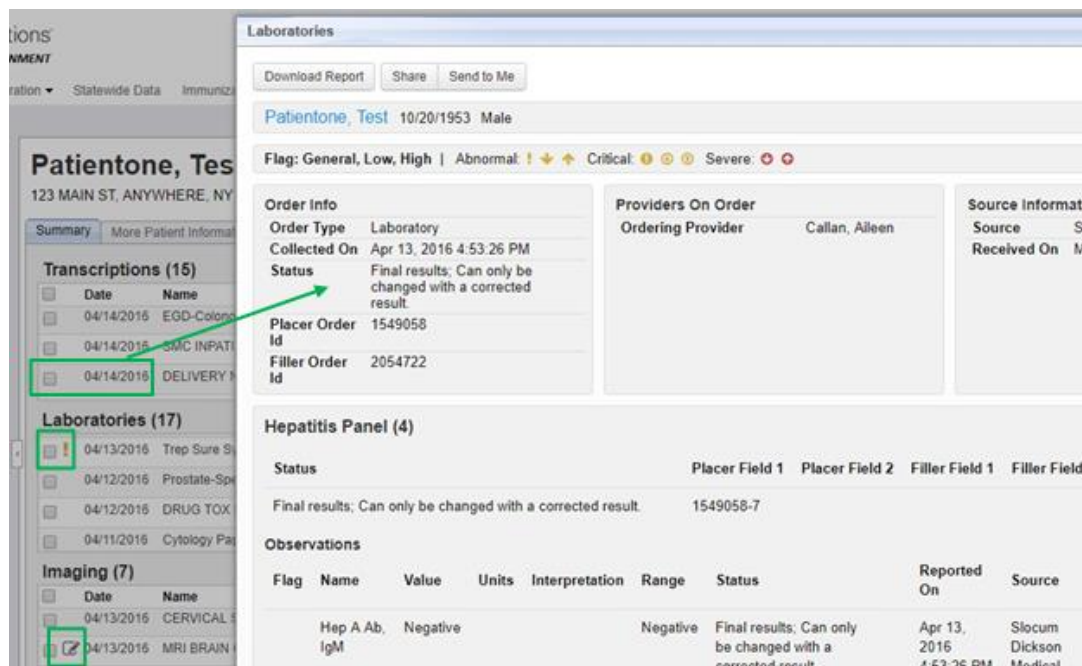

You will see information by **Name, Source**, and **Date** for each type of data. Information is defaulted to show in chronological order, with newest results first. Within each type of data, by clicking on the heading (Date, Name, Source) you can re-sort to your preference.

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.

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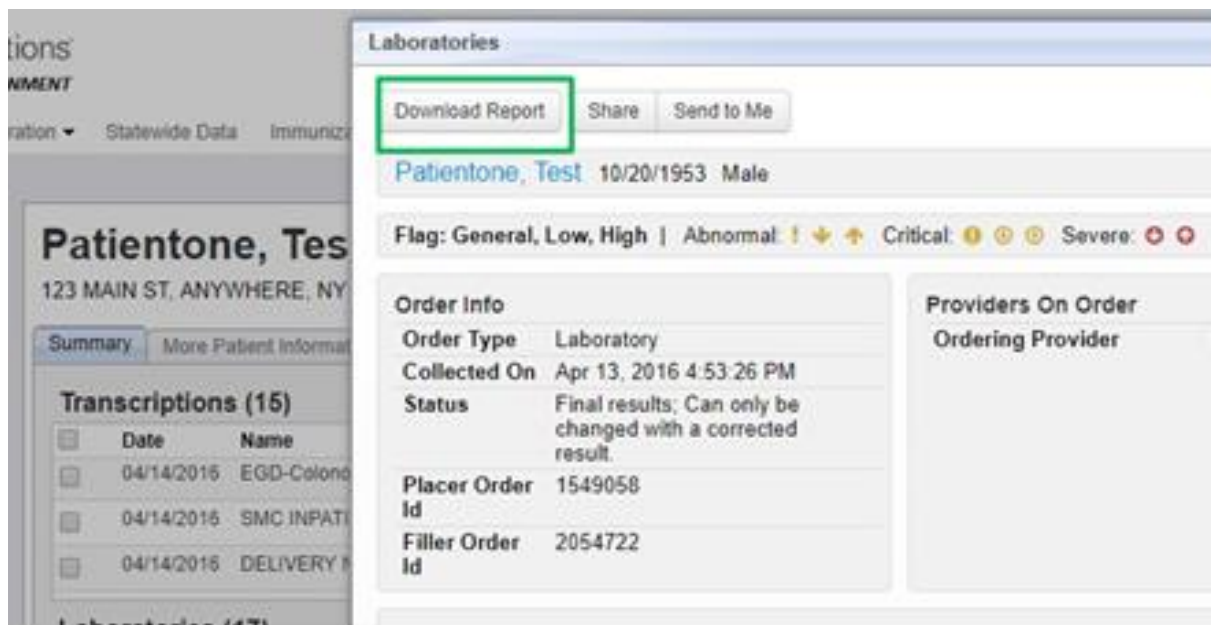
Imaging reports are available as well as the image itself if **View All Images** or **View This Image** is displayed. You can currently access X-Rays, CT scans, MRI, Sonogram images from many sources. You may receive a notice of the image being blocked. You must disable Pop-Up Blockers to **always allow**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

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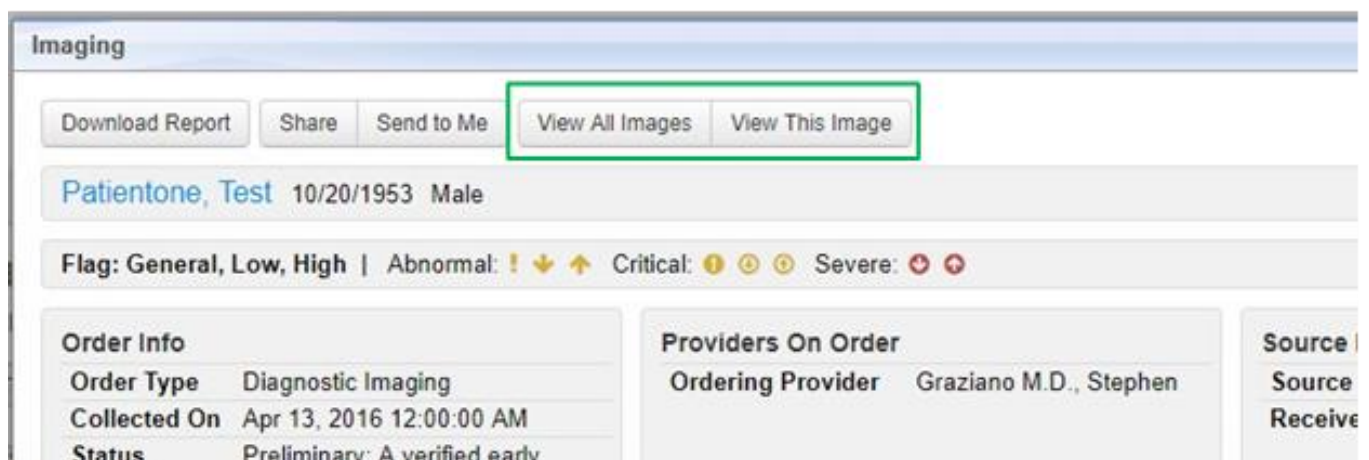
Refer to the Imaging guide for explanation of the navigational tools for this screen after selecting **View This Image.**
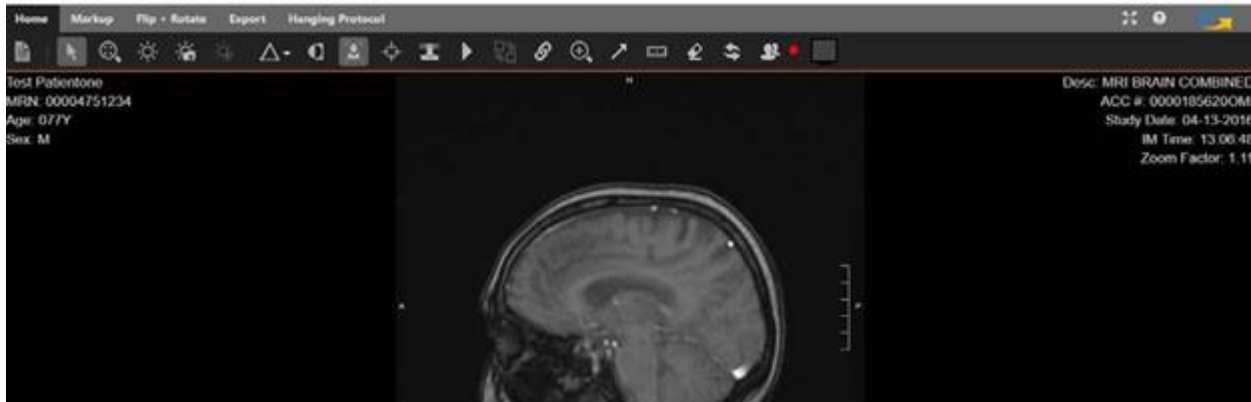
For **View All Images** you can see all imaging studies for this patient that are stored on the Source server.

Up to four can be selected to perform comparative studies.

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

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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: 2.16.840.1.113883.3.227.99.6788.32035.0 |
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

- Payers
- 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
PayID: 13282	Medicare Upstate
PO Box 6189
Indianapolis, IN 46206	Test Patientone

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.

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.
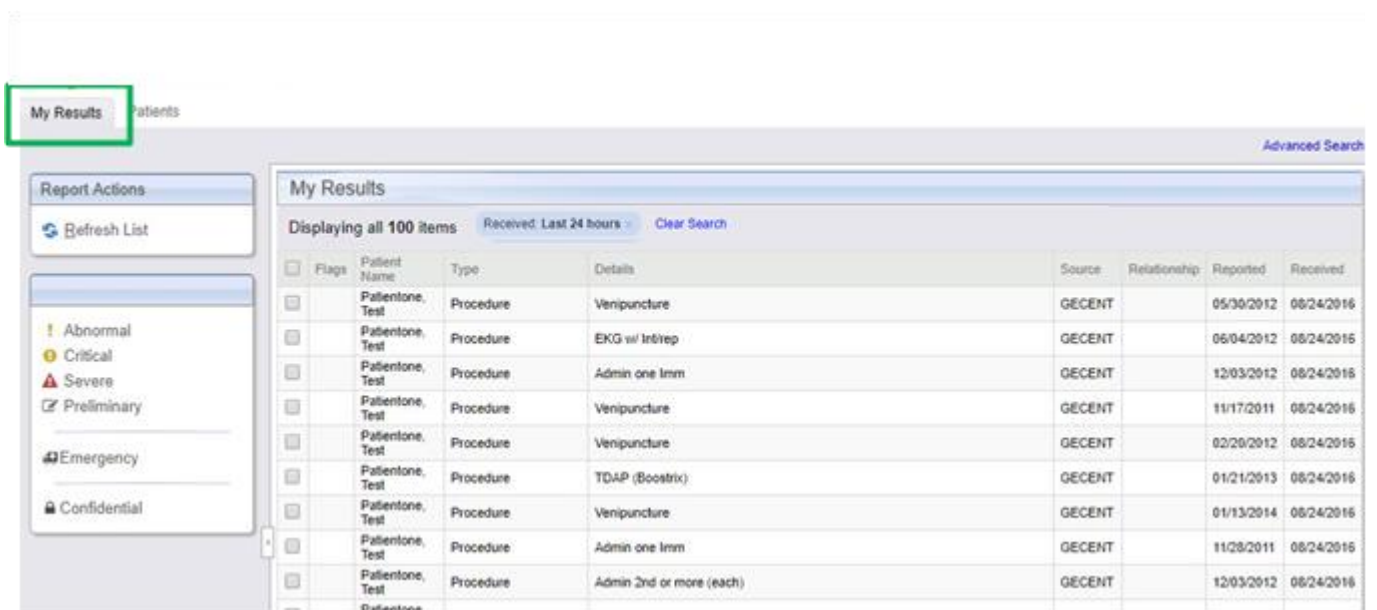
14 MyResults

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.

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

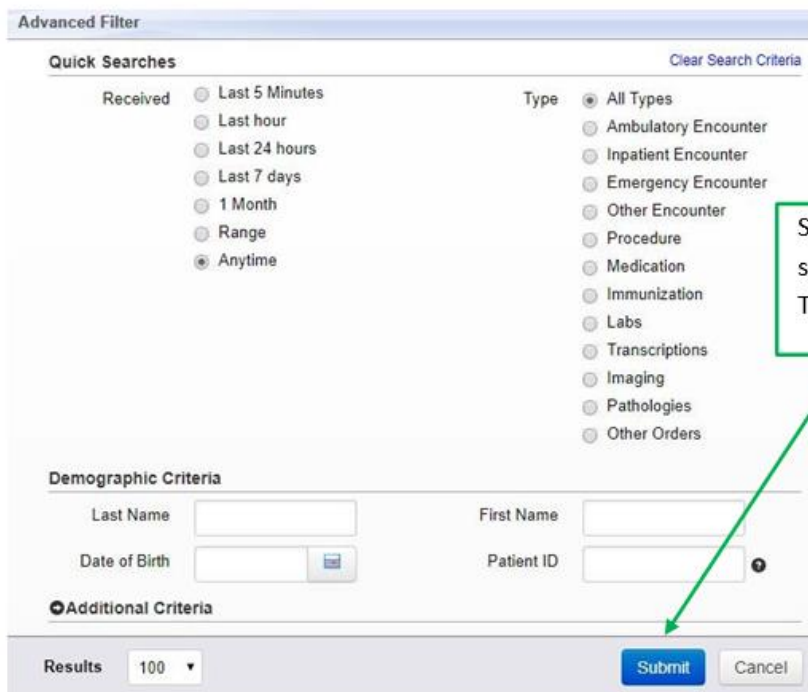Select the date frame and type of services you wish to filter the results. Then click **Submit** box.

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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.

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