MyCareCorner

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by Evident

PATIENT CENTERED.
COMMUNITY FOCUSED.

MyCareCorner

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Chapter 1 Introduction

1.1 Attestation Disclaimer

Promoting Interoperability Program attestation confirms the use of a certified Electronic Health Record (EHR) to regulatory standards over a specified period of time. Evident and TruBridge Promoting Interoperability Program certified products, recommended processes and supporting documentation are based on Evident’s interpretation of the Promoting Interoperability Program regulations, technical specifications and vendor specifications provided by CMS, ONC and NIST. Each client is solely responsible for its attestation being a complete and accurate reflection of its EHR use during the attestation period and that any records needed to defend the attestation in an audit are maintained. With the exception of vendor documentation that may be required in support of a client’s attestation, Evident and TruBridge bear no responsibility for attestation information submitted by the client.

1.2 What's New

This section introduces the new features and improvements for the MyCareCorner for release Version 20. A brief summary of each enhancement is given referencing its particular location if applicable. As new branches of Version 20 are made available, the original enhancements will be moved to the Previous Work Requests section. The enhancements related to the most current branch available will be listed under the main What's New section.

Each enhancement includes the Work Request (WR) Number and the description. If further information is needed, please contact the **Software Services** Support.

Chapter 2 Overview

The MyCareCorner is a purchased application that allows patients to view their patient summaries online at MyCareCorner.net, via facility-purchased applications (i.e., Clinical Summary, Online Bill Pay, Secure Messaging, etc.)

MyCareCorner must be utilized in order to achieve the Promoting Interoperability objectives for MU Stage 1 2014, MU Stage 2 and Promoting Interoperability Stage 3.

Chapter 3 Registering for MyCareCorner

MyCareCorner provides patients with access to their electronic health record. There are several option for registering for MyCareCorner: Email Registration, Printed Instructions and Self registration.

3.1 Self-Registation

A patient may self register for MyCareCorner by going to MyCareCorner.net and creating an account. Once an account has been created an invitation code (as seen in Step 8 in the Self-Registration section) to access the patient's health record and those of their family members. Patient's may contact the hospital or clinic to request a registration invitation for MyCareCorner.The following document can be customized for the facility and used to be distributed as patient guides:

1. Select the link: Self Registration

2. Download the PDF document to the PC.

3. Open the document in Adobe Acrobat.

4. Insert the facility logo.

5. Save and use to distribute to patients.

3.2 Email Registration

A patient may receive an email inviting them to register for MyCareCorner. For patients to receive the email, their email address will need to be populated on the profile to copy over to each newly created visit. If an email is entered on the profile, and no visit is created, the patient will still receive an email to register on MyCareCorner, but there will not be any clinical information to view. Once the patient has a visit, the clinical information for that visit will be available to view within MyCareCorner.

The email sent to the patient will include a hyperlink to access MyCareCorner. as well as instructions on how to access the account. The email invite will expire 90 days after being sent to the patient. A new email invite will need to be resent if the patient does not access prior to the invite expiring. An email may be added to the patients account by accessing the Portal Management 11 screen or the following locations:

Select **Hospital Base Menu** > **Profile Listing** > **Select Patient** > **Enter the patient's email within the Email field**
Or
Select **Hospital Base Menu** > **Profile Listing** > **Select Patient** > **Create New Visit** > **Ok** > **Enter the patient's email within the Email field**

When creating a new visit, an authorized representative may be entered to also receive an email to have access to the patient's account including all clinical information. If an authorized representative is entered, MyCareCorner will display all of their personal visits plus any visits where they are entered as the authorized representative. For example, John Reed has been to the hospital multiple times in the past two months. His wife, Grace Reed, is being registered today and has John loaded as her authorized representative. The next time John logs in to the MyCareCorner, he will see his visits plus Grace's visit for today where he is loaded as the authorized representative. The Authorized Representative may be added in the following location:

Select **Hospital Base Menu** > **Profile Listing** > **Select Patient** > **Create New Visit** > **OK** > **Contact** > **Enter the Patient Portal Authorized Representative.**

The entering of an email address for the patient or authorized representative will also facilitate the automatic creation of a Release of Information request entry for Patient Possesses Information to Access Portal when a patient is discharged from a room. Only one entry will be created if both the patient and authorized representative have an email address listed. If the account already has a Patient Possesses Information to Access Portal ROI entry, a new one will not be created. An example would be if a reverse discharge has been performed on the account.

3.3 Printed Registration

A patient may also register by receiving the invitation for MyCareCorner in a PDF format that may be printed. To print the invitation within Thrive access the Portal Management screen from the patient's account and select **Print**. The patient will then register following the section on Using the Printed Instructions within the Patient Guide to Using MyCareCorner.

NOTE*: For more information on the Portal Management screen please see Portal Management within Thrive.* 11

Chapter 4 MyCareCorner

MyCareCorner provides all the tools a patient needs to manage their health independently or in collaboration with their healthcare professional. Unlike static portals, MyCareCorner brings health data to life and promotes a collaborative approach to care.The following document can be customized for the facility and used to be distributed as patient guides:

1. Select the link: Patient Guide to Using MyCareCorner

2. Download the PDF document to the PC.

3. Open the document in Adobe Acrobat.

4. Insert the facility logo.

5. Save and use to distribute to patients.

4.1 Adding Family Members to a Registered Account

Additional family members (spouse, children, and/or parents) may be added to a registered MyCareCorner account once a healthcare provider (hospital or clinic) provides the family member with an email or a printed copy of the registration instructions for MyCareCorner.The following document can be customized for the facility and used to be distributed as patient guides:

1. Select the link: Adding a Family Member to a Registered Account

2. Download the PDF document to the PC.

3. Open the document in Adobe Acrobat.

4. Insert the facility logo.

5. Save and use to distribute to patients.

4.2 Sharing a Patient Record with Another MCC User

The Share Record option in MyCareCorner allows a patient to share their health record with other people, such as a spouse,
parent, or children. Sharing their record allows person whom they shared it with to view and update their health information, depending on the level of access the patient gave them. Access can be changed or removed at any time. The following document can be customized for the facility and used to be distributed as patient guides:

1. Select the link: Sharing My Record in MyCareCorner

2. Download the PDF document to the PC.

3. Open the document in Adobe Acrobat.
4. Insert the facility logo.
5. Save and use to distribute to patients.

Chapter 5 CSA Tool

The CSA Tool is the facility administrator tool to manage patient accounts within the MyCareCorner for patients at your facility. This tool gives the facility the ability to locate and manage patient accounts in MyCareCorner to update, edit, and reset patient account passwords.

The CSA Tool has two menu options located on the left side of the screen:

- **Support Current Users:** This page allows for a patient account search using the fields on the screen. Patient accounts may also be searched by selecting the **Facility** and selecting **Search**. From the patient list, accounts may be viewed, edited, and delete patient documents or manage accounts/access.

- **Change Password:** This page allows the ability to change the password associated with the logged in Admin account.

5.1 Support Current Users

The Support Current Users page allows for a patient account to be searched for by using the fields listed below. To search for a patient record, enter the appropriate information to locate a specific patient record. The following search options are available:

- First Name
- Last Name
- Date of Birth
- Street
- City
- State
- Postal Code
- Patient ID
- Facility

Once the appropriate data has been entered, select the **Search** option. The accounts matching the criteria entered will display below the search fields.

From the list of results, select the **View** option to display the selected account. The Patient Details will display, which includes First and Last Name, Gender, Date of Birth, and Address to confirm the appropriate patient account. The following options are available to manage the account:

- **Edit Record**: Allows the patient's First and Last Name, Gender, Date of Birth, and Address to be edited.

- **Delete Document**: Allows documents that have been uploaded to MyCareCorner to be removed. Once selected all available documents will display. Select the appropriate document to delete.

- **Manage Account**: Displays the Manage Account screen which allows the following: account details to be edited, disable the account, and reset the password. Please see Manage Account 10 for additional information.

- **Change Access**: Allows the access level of the account to be modified. Select **Save** to changed the patient's account access or select **Cancel** to exit without changing. The following levels of access are:
  - o **Read-Only:** This account has Read - only access to associated patient records.
  - o **Read and Modify:** This account has read and modify privileges for associated patient records.
  - o **Guardian:** This account has guardian privileges over other patient records.
  - o **No Access:** This account has no access for associated records.

Manage Account

The Manage Account screen which allows the following options to modified:

- **Disable Account**: Allows the account to be disabled.

- **Reset Password**: Allows a new password to be entered. Once selected enter the new password and re-enter the new password in the confirm password field. Select **Confirm** to save the new password or **Cancel** to exit without saving.

- **Reset Password by Email**: Allows a reset password email to be sent to the patient's email address. Select **Yes** to send the email or select **No** to cancel exit without sending the email.

- **Edit Account Details**: Allows the Login, Name and Communication Email to be updated. Select **Update** to save the edited information or **Cancel** to exit without saving.

5.2 Change Passwords

The Change Password screen allows the Admin Account password to be modified.

To Update/Change the logged in Admin Account's password:

1. Enter the new password within the New Password field.

2. In the **Confirm New Password** field, enter the new password again.

3. Select **Save** to update the current password or **Cancel** yo remove the password information within the fields.

Chapter 6 Portal Management within Thrive

The Portal Management screen is available to assist the facility in monitoring the registration process for the patient within MyCareCorner. This screen may be accessed via the following paths:

From the Person Profile:

Select **Charts** > **Search by Name** > **Patient** > **Portal Management**

From System Menu:

Select **System Menu** > **Patient Account** > **Census** > **Misc Options** > **Portal Reset**

From Point of Care:

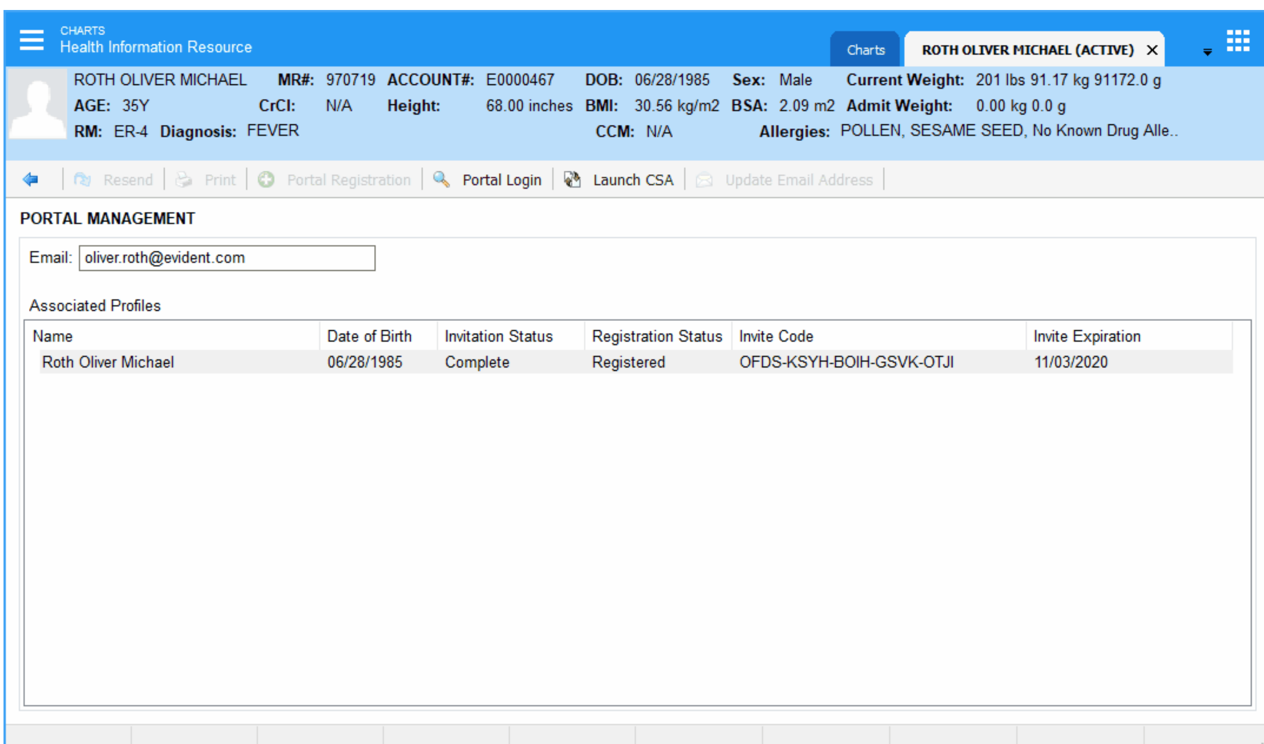
Select **POC Access** > **Patient Account** > **Virtual Chart** > **Discharge Tab** > **Patient Portal Link**

From Charts:

Select **Patient Chart** > **Health Information Resource** > **Portal Management**

From MP-EHR

Select **Patient Charting** > **Patient Portal**



Portal Management

The patient's email address will display within the **Email** field. This field may be edited as needed. If any changes are made to the Email field, **Update Email Address** should be selected to save the modifications to the patient's email.

Associated Profiles will display the patient's profile and any profiles that the selected patient is the Authorized Representative.

The Portal Management screen may be filtered by the following options:

- **Name**: Displays the profile name of the selected patient or profile name that the selected patient is the Authorized Representative.

- **Date of Birth**: Displays the patient's date of birth.

- **Invitation Status**: Displays the following status for the invitation that was sent to the patient:
  - **Not Sent**: Email Invitation has not been sent to the patient.
  - **Pending**: Email Invitation has been sent, but the patient is not registered within MyCareCorner.
  - **Complete**: Email Invitation has been sent and the patient is registered within MyCareCorner.

- **Registration Status**: Displays the following status of the patient's registration within MyCareCorner.
  - **Not Registered**: Displays when the patient does not have an active account within MyCareCorner.
  - **Registered**: Displays when the patient has an active account within MyCareCorner.

- **Invite Code**: Displays the invitation code generated when the email was sent to the patient. The code validates who the patient is during the registration process.

- **Invite Expiration**: Displays the expiration date of the generated invitation. MyCareCorner registration invitations will expire 90 days after original generation.

Each patient record will display on its own line and are selectable to enable the following options on the action bar:

- **Back Arrow**: When selected, the Health Information Resource screen will display.

- **Send/Resend**: Allows the MyCareCorner invitation to be sent or resent to the patient's email address. This option is enabled when a valid email address is available on the selected visit or profile.
  - If the Invitation Status is Not Sent this option will display as Send. When Send is selected an invitation for MyCareCorner Registration will be sent to the email on the visit or profile.
  - If the Invitation Status is Pending this option will display as Resend. When Resend is selected the invitation for MyCareCorner Registration will be resent to the email on the visit or profile.

- **Print**: Displays the invitation for MyCareCorner Registration in a PDF format that may be printed for the patient.

- **Portal Registration**: This option is enabled when the patient does not have a registered account for MyCareCorner. If selected, MyCareCorner.net will display with the embedded invitation code allowing the user to register the patient at bedside.

- **Portal Login**: Allows MyCareCorner.net to display, and the patient may log into their registered MyCareCorner account.
- **Launch CSA**: Allows the CSA Tool to display. This option is enabled when the patient has a registered account for MyCareCorner. The CSA tool is the facility's administrative tool for MyCareCorner. Please see the CSA Tool 9 for more information.
- **Update Email Address**: Allows any modifications made to the patient's email address to be saved. This option is enabled when the user makes any modifications to the Email field. Once selected, the email address will update on the visit and/or profile.

Chapter 7 Secure Messaging

The new **Secure Messaging** screen is available for facilities using MyCareCorner. This will allow a message to be sent to MyCareCorner for the patient, or to the patient's authorized representative.

Select **Secure Messaging** from the Communication Selection Screen.

The Message Inbox will display a split screen with the Inbox panel on the left hand side of the screen and the Detail panel displaying on the right. The Inbox panel will display a listing of all messages with the name of the sender and the date/time the message was sent. An unacknowledged message will display as bold until it has been acknowledged. Once a message has been selected, it will display within the Detail panel. If a message has multiple replies in a conversation, the conversation details will display in chronological order with the most recent message displaying first. When messages are sent to an account's Authorized Representative, an indication will display on the message header within the Detail panel.

The following options are available within the action bar:

- **Back Arrow**: When selected the previous screen will display.
- **View**: When a conversation has been selected from within the Inbox, the View option becomes enabled. Once selected, a full screen of the conversation will display.
- **New Message**: When selected the New Message screen will display allowing the user to start a new conversation. See New Message 17 for additional information.
- **View Attachment**: When a conversation has been selected from within the Inbox, and it has an attachment available, the View Attachment option becomes enabled. Once selected, the attachment will display within in a PDF document. The attachment will also display within the Document Queue and will be viewable until the document is attached to a visit following the current document queue process. Please see Document Queue 21 for additional Information.
- **Acknowledge**: When a conversation has been selected from within the Inbox, the Acknowledge option will become enabled. Once selected, the selected message will no longer display on the user's homescreen and the message subject and date/time will no longer display in bold.
- **Reply**: When a conversation has been selected from within the Inbox, the Reply option will become enabled. Once selected, a free text box will display for the user to enter a response to the selected conversation.

The Message Inbox may be filtered by the following options:

- **All**: Displays all types (Acknowledged and unacknowledged) of messages in the Inbox.
- **Unacknowledged**: Displays only messages with a status on unacknowledged.
- **Acknowledged**: Displays only messages with a status on acknowledged.

- **Sent**: Displays only messages sent to the patient or authorized rep.

- **Received**: Displays only message received from the patient or authorized representative.

- **Patient check box**: Selecting this option will filter all messages within the inbox to display any message sent to or received from the patient. This filter will also display any messages sent from visits that the selected patient is an authorized representative.

- **Auth Rep check box**: Selecting this option will filter all messages within the inbox to display all messages to the selected patient's authorized representative.

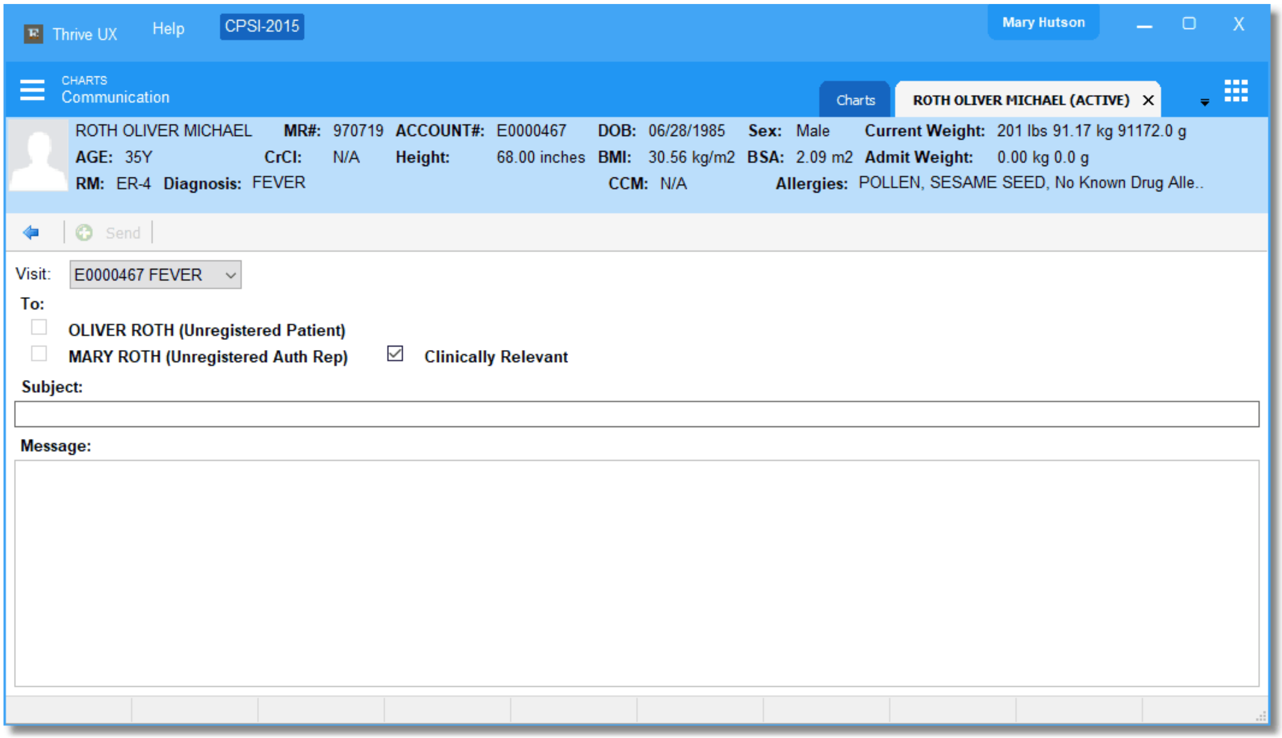
- **Message Status:** Allows the messages within the inbox to be filtered by the status of transmission.
  - **All:** displays all messages regardless of transmission status.
  - Pending Transmission: Displays all messages that have been sent but have not successfully delivered to the patient.
  - **Completed:** The message was successfully delivered to the patient and/or authorized rep.
  - **Transmission Failed:** The message did not send to the patient and/or authorized rep.
  - Pending Registration: MyCareCorner invitation has been sent but the patient has not registered.
  - **Partial Success:** The message has more then one recipient and one of the messages failed, but one was successfully sent.

- **Search**: Allows a smart search to delimit any conversation that contains the entered text within the message subject or the body of the message.

***NOTE**: Messages may not be sent to a patient or authorized rep without an active MyCareCorner registration.*

7.1 New Message

Select **Patient Chart** > **Communication** > **Secure Messaging** > **New Message**



New Message

The New Message option will be enabled when a patient or authorized rep has an active MyCareCorner registration.

Select **New Message** and enter the message's subject in the Subject field. Then begin the message in the Message section.

The following information is available on the Message Detail:

- **Visit:** The drop down will display all visits associated with the patient's profile and defaults to the most recent visit. If the visit has a Principle Diagnosis, this will display along with the account number. If it is not available, the Chief Complaint will display in its place. If available, the selected visit will determine the Authorized Representative that displays in addition to the patient.
-
- **From**: This field automatically populates with the user name that is logged into the system.

- **To**: This field displays the patient name that is being accessed to send a message.
  - **Patient check box**: Displays the name of the patient the message is being sent to. This check box defaults as checked. If unchecked, the To field becomes blank.
  - **Authorized Rep check box**: Displays when the patient's account has an Authorized Rep on their account. This will display the Profile name of the Authorized Rep. If the check box is selected, the Authorized Rep's name will display in the To field.

- **Clinically Relevant**: The check box will default as checked and should be unchecked if the message is not clinically relevant. This check box counts toward Promoting Interoperability (Stage 3) for sending clinically relevant messages from the provider to the patient.

- **Subject**: This is a free text field to enter the subject of the email.

- **Message**: This is a free text field for the message to the patient.

- **Replying To**: If applicable, this will display the message details of the incoming message from the patient and/or authorized rep.

After entering the message, select **Send** from the action bar. Thrive will then return to the Message Inbox screen. The **Back Arrow** is also available to return to the Message Inbox screen, canceling the creation of a new message.

7.2 Reply to a Message

To respond to a message, select the message within the Message Inbox and select **Reply**. Then enter the response to the message in the Message Detail section.

The following information is available on the Message Detail:

- **Visit:** Displays the visit number that the message was sent from if the message originated from within Thrive. Or it will display the most recent visit number if sent from MyCareCorner. If the visit has a Principle Diagnosis, this will display along with the account number. If it is not available, the Chief Complaint will display in its place. If available, the selected visit will determine the Authorized Representative that displays in addition to the patient. This is a view only field.

- **To**: This field displays the patient name that is being accessed. This field is view only.

  - **Patient check box**: Displays the name of the patient the message is being sent to. This check box defaults as checked. If unchecked, the To field becomes blank.
  - **Authorized Rep check box**: Displays when the patient's account has an Authorized Rep on their account. This will display the Profile name of the Authorized Rep. If the check box is selected, the Authorized Rep's name will display in the To field.

- **Clinically Relevant**: The check box will default as checked and should be unchecked if the message is not clinically relevant. This check box counts toward Promoting Interoperability (Stage 3) for sending clinically relevant messages from the provider to the patient.

- **Subject:** This is a free text field to enter the subject of the email.

- **Message**: This is a free text field to allow a response to the patient.

- **Replying To**: Displays the previous thread of the message(s) that the message is being replied to from the patient and/or authorized rep.

After entering the note, select **Reply** from the action bar. Thrive will return to the Message Inbox screen. The **Back Arrow** is also available to return to the Message Inbox screen, canceling the creation of a reply.

Chapter 8 Information Submissions

Information Submissions is a purchased application and is only available if the user is logged into Thrive UX. If purchased, patients or authorized representatives will have the ability to upload documents from within Thrive Patient Portal. Once a document has been uploaded, it may then be linked to an account from within Thrive.

8.1 Acessing Information Submissions

There are several launch points within Thrive that will allow access to Information Submissions.

From the Person Profile:

Select **Hospital Base Menu** > **Profile Listing** > **Patient Name** > **Information Submissions**

From the Communication Application:

Select **Charts** > **Patient Account** > **Communication** > **Information Submissions**

The paths above will then display the Document Queue 21 screen.

8.2 Document Queue

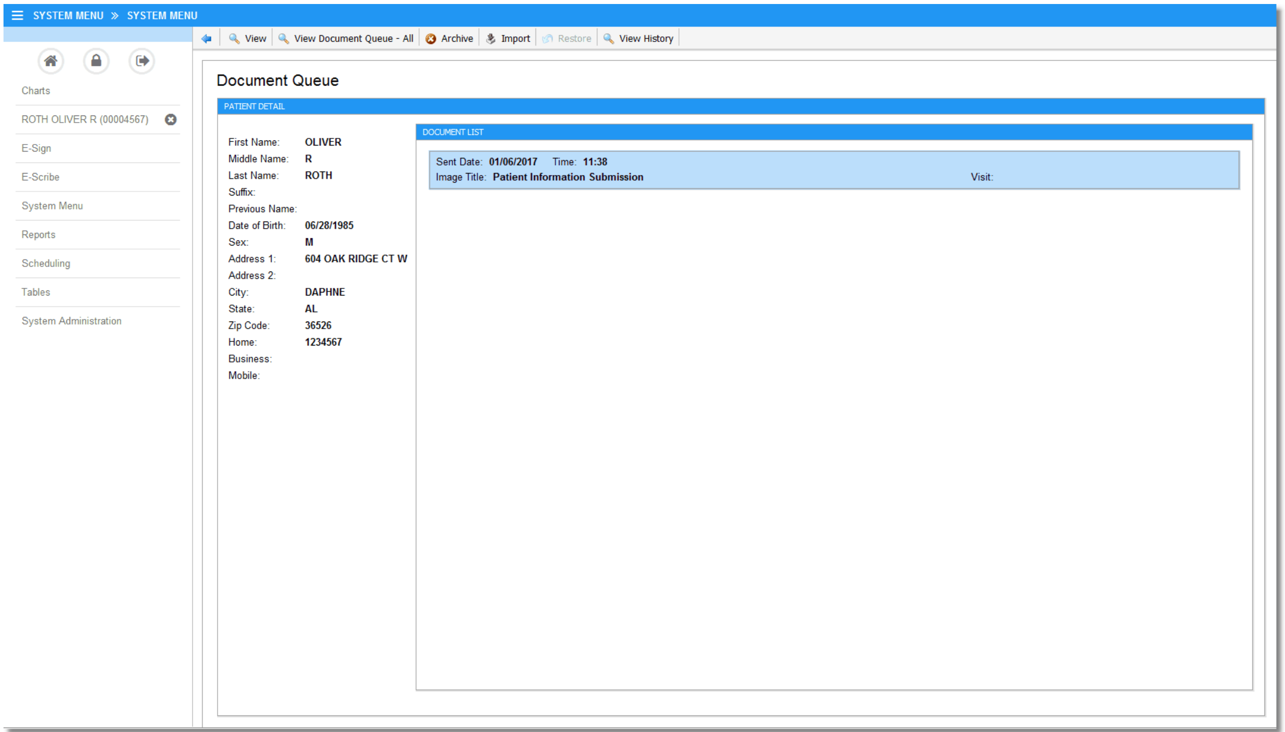
The Document Queue screen is used to import documents that were sent from the patient's or authorized representative's MyCareCorner account.

The following options are available within the action bar:

- **Back Arrow**: Allows the user to return to the previous screen.
- **View**: Displays the uploaded document. This option is enabled when a document is selected.
- **View Document Queue - All**: Displays all documents associated with the person profile. When this option is selected the option **View Document Queue - Match** will display.
- **View Document Queue - Match**: Displays all uploaded documents that have not been imported to a visit on the person profile. When this option is selected the option **View Document Queue - All** will display.
- **Archive**: Stores uploaded documents that will not be imported. This option is enabled when a document is selected and it has not been imported.
- **Import**: Allows the selected document to be imported and linked to an account.This option is enabled when a document is selected and it has not been imported.
- **Restore**: Allows archived documents to be restored and imported to an account. This option is enabled when an archived document is selected.

- **View History**: Displays a log of all user who have viewed the selected document. This option is enabled when a document is selected.

Select **Hospital Base Menu** > **Profile Listing** > **Patient Name** > **Information Submissions**



Information Submission - Document Queue

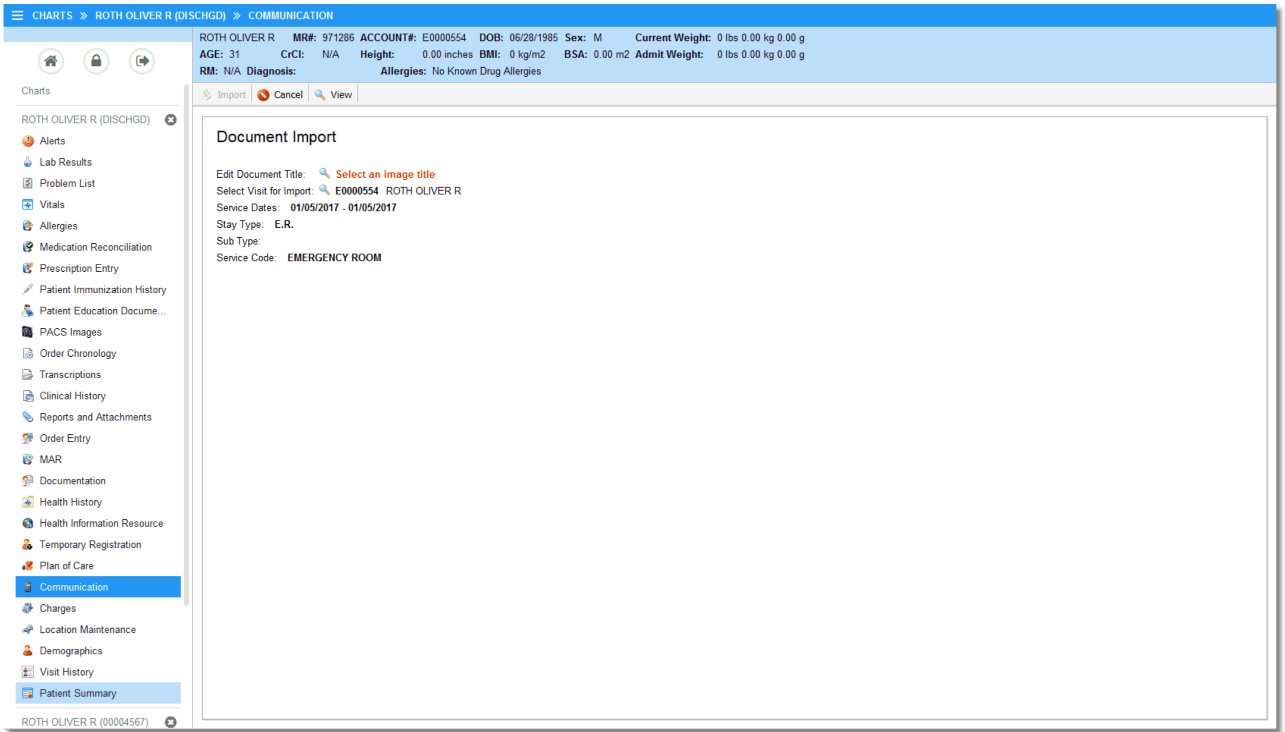
Documents available to import will display with the sent date and time that the patient or authorized representative sent the document via MyCareCorner along with the Image Title: Patient Information Submission. The Visit will display as blank until it is imported.

To import a document:

1. Select the **Patient Information Submission** document from the queue that will be imported to the patient's account.

2. Select **Import.**

Select **Information Submissions** > **Patient Information Submission Document** > **Import**



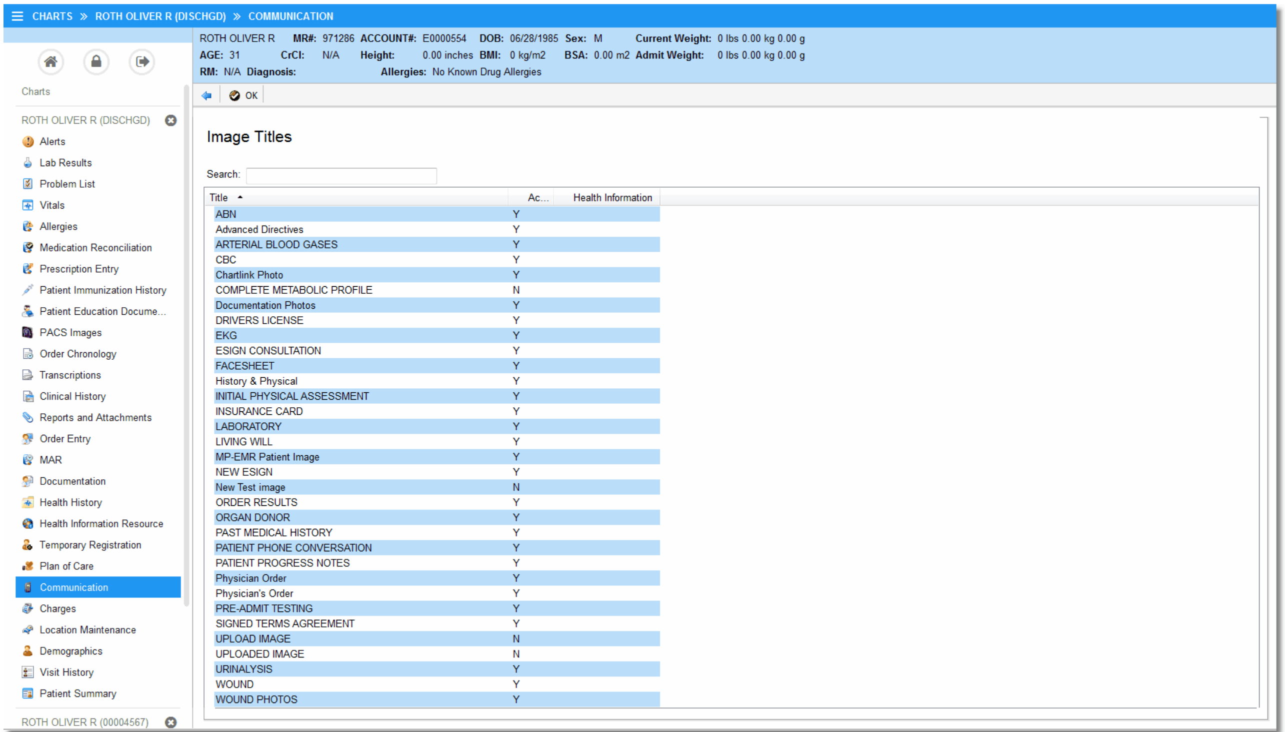
Information Submissions - Import Document

The Document Queue screen will display the Document Title, Visit Number, Service Date (Admit date - Discharge Date), Stay Type, Sub Type and Service Code. The Document Title and Visit number may be edited. If Information Submissions is accessed from the Person Profile, the visit number will need to be addressed. If Information Submissions is accessed from the Communication application, the current visit the user has selected will auto-populate within the Select Visit for Import field.

The Document Title and Visit must be selected prior to importing the document.

3. Select the **Magnifying Glass** icon to choose the image title.

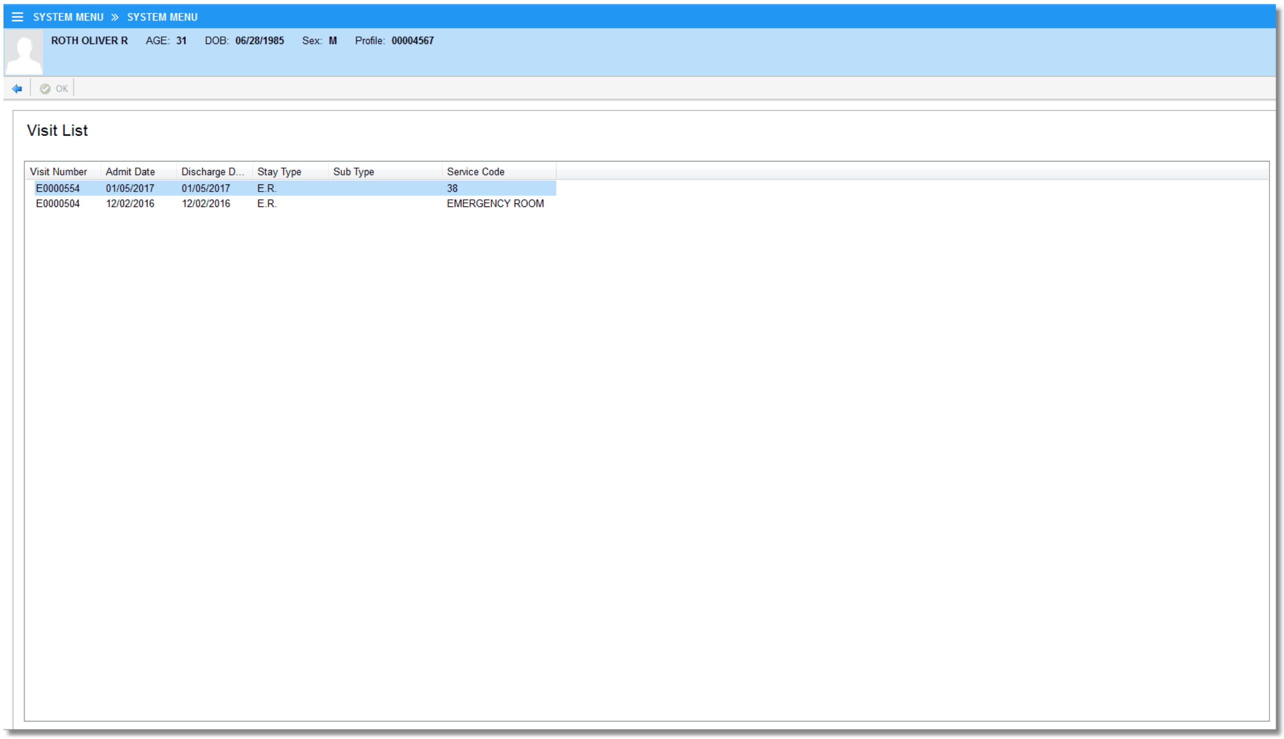
Select **Information Submissions** > **Patient Information Submission Document** > **Import** > **<u>Select an Image Title</u>**



Information Submissions - Image Titles

4. Once an Image title has been selected, select the **Magnifying Glass** next to the visit number if Information Submissions was accessed from the Person Profile.

Select **Information Submissions** > **Patient Information Submission Document** > **Import** > **<u>Select Visit for Import: Magnifying Glass</u>**



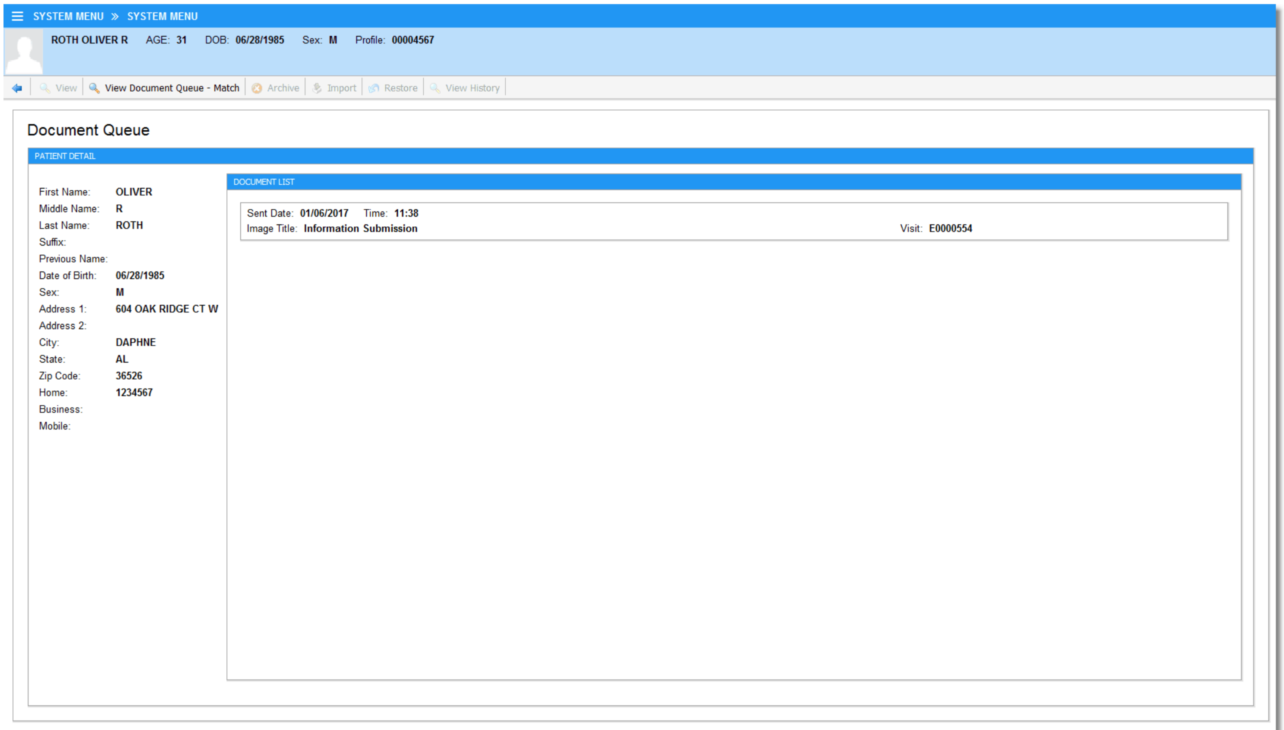
Visit List

5. Select the visit. All visits will display for the selected Person Profile, even if the visit has not been discharged from within Thrive. Once the visit has been chosen, select **OK**.

6. Select **Import**.

When a document has been imported it will Display with the Image Title that was selected and the visit number it was associated with in the Document Queue. It will also place a copy of the document within Electronic File Management with the document origin of Pt Info Sub.

Select **Information Submissions** > **Patient Information Submission Document** > **Import**



Document Queue

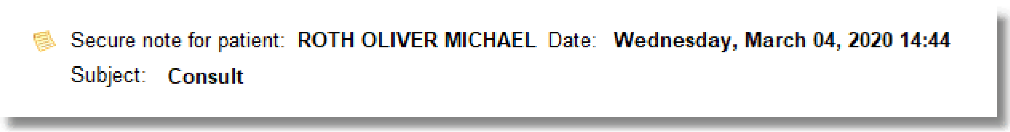
Chapter 9 Homescreen Notifications

Secure messages and attachments are able to be viewed from the Homescreen. The task type **SecurePatientMessage** may be added to a specific folder so the user only sees notifications when a secure message is received from the patient portal to the provider. This notification is automatically set up within the personal inbox.

The following information will display within the Homescreen Alert:

- **Secure note for patient**: Displays the patient's name.
- **Date**: Displays the date and time the message was sent.
- **Subject**: Displays the text entered as the subject of the secure message.

Select **Home**



Homescreen Secure Message

When a notification displays on the homescreen, select the secure note. The Secure Note screen will display with the following options:

- **Back Arrow**: When selected, the Homescreen will display.
- **Reply**: Allows the replied message to be sent to the patient in MyCareCorner. This option becomes enabled when text has been entered within the Message field. Once this option has been selected, this will also acknowledge the message and remove the new message notification from the Homescreen and the Message Inbox in the Communication Application.
- **View Attachment**: When a message has been selected from the Homescreen and it has an attachment available, the View Attachment option becomes enabled. Once selected, the attachment will display within in a PDF document. The attachment will also display within the Document Queue and will be viewable until the document is attached to a visit following the current document queue process. Please see Document Queue 21 for additional Information.
- **Acknowledge**: When a message has been selected from the Homescreen, the Acknowledge option will become enabled. Once selected, the selected message will no longer display on the user's homescreen and the message subject and date/time will no longer display in bold within the Message Inbox in the Communication Application.
- **Open Chart**: Allows the patient's chart, from the visit number selected within the Visit drop down, to display. This option becomes enabled when a visit is selected within the Visit drop down.

The Secure Message screen will display the following information:

- **Visit**: The drop down will display all visits associated with the patient's profile and defaults to the most recent visit. If the message was sent from a previous visit, then the visit number originally associated with the message will display. If available, the selected visit will determine the Authorized Representative that displays in addition to the patient.

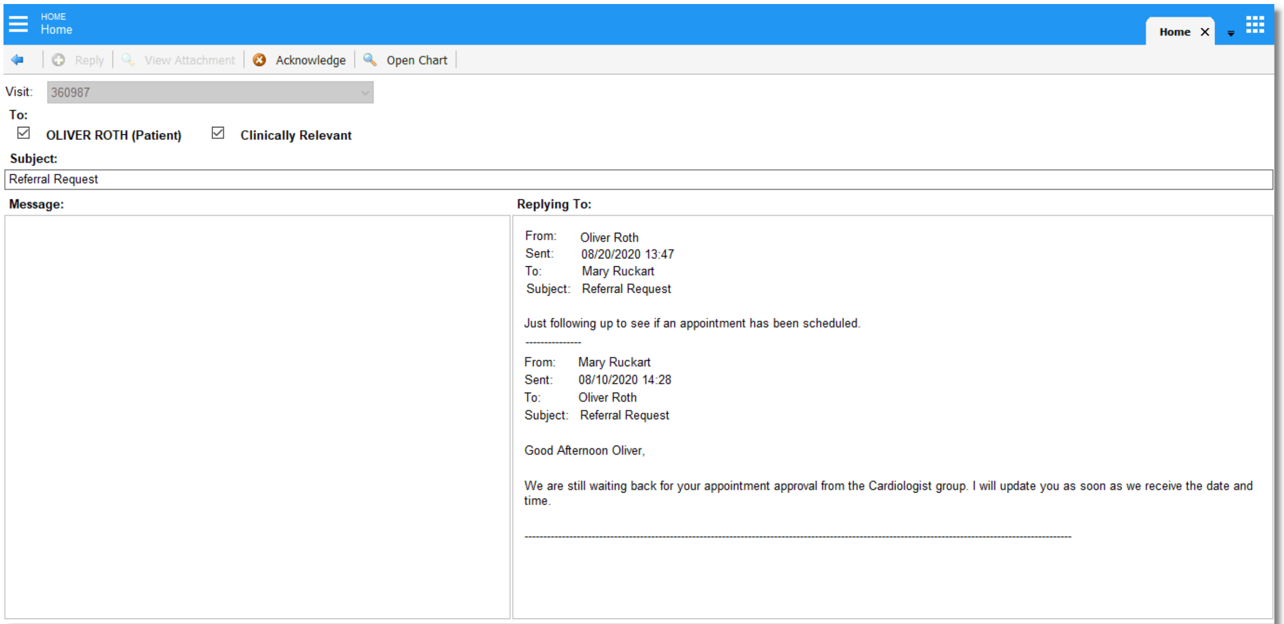
- **To**: This field displays the patient name that the message is being sent to.
  - **Patient check box**: Displays the name of the patient the message is being sent to. This check box defaults as checked.
  - **Authorized Rep check box**: Displays when the patient's account has an Authorized Rep on their account. This will display the Profile name of the Authorized Rep. If the check box is selected, the Authorized Rep's name will display in the To field.
  - **Clinically Relevant**: The check box will default as selected and should be unchecked if the message is not clinically relevant. This check box counts toward Promoting Interoperability (Stage 3) for sending clinically relevant messages from the provider to the patient.

- **Subject**: This displays the original subject that the user is replying to. This is a free text field and the subject may be modified if applicable.

- **Message**: This is a free text field for the user to enter the reply message to the patient.

- **Replying To**: Displays the previous message that the user is replying to.
  - **From**: Displays the name of who sent the message.
  - **Sent**: Displays the date and time the message was sent.
  - **To**: Displays the name of the user that the message was sent to.
  - **Subject**: Displays the subject of the message.
  - **Message**: Displays the content of the message.

Select **Home** > **Secure Message Notification**



Homescreen Secure Message

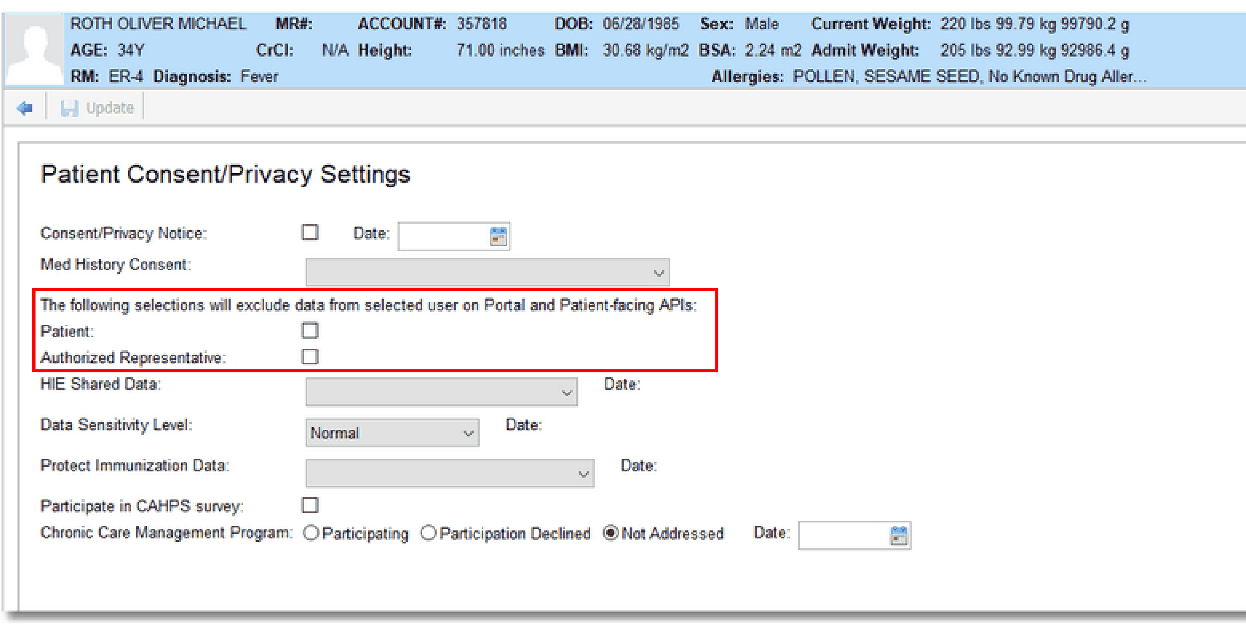
Chapter 10 Exclusions

10.1 Overview

Effective April 5, 2021, the Information Blocking rule prohibits any action or practice that interferes with the access, exchange, or use of an individual's electronic health information (EHI). There are eight exceptions when interference with the access, exchange or use of an individual's EHI would not be considered Information Blocking. To avoid non-compliance, and potential non-compliance penalties, Healthcare providers should ensure that suppression of any patient EHI meets one of the documented exceptions. Questions concerning the Information Blocking rule, and the eight exceptions, may be answered on the ONC's FAQ web page.

The Patient Summary or Referral/Transition of Care documents may be excluded from the Patient Portal for the patient and/or Authorized Representative. This may be done from the Consent/Privacy Settings screen by selecting either **Patient** or **Authorized Representative** under the statement, *"The following selections will exclude data from selected user on Portal and Patient-facing API's".* The following paths will allow access to the Consent/Privacy Settings screen:

Select **Hospital Base Menu** > **Patient Account** > **Census** > **Stay Tab** > **Consent/Privacy Settings**
Or
Select **Hospital Base Menu** > **Patient Account** > **Medical Records** > **Print Electronic Record** > **Account Number** > **Consent/Privacy Settings**
Or
Select **Patient Chart** > **Reports and Attachments Icon** > **Medical Record Option** > **Consent/Privacy Settings**
Or
Select **Patient Chart** > **Demographics** > **Consent/Privacy**



Patient Consent/Privacy Settings

For additional information on the Patient Consent/Privacy Settings screen please see the Registration User Guide.

When Patient or Authorized Representative is selected, the visit will not display in the MyCareCorner.

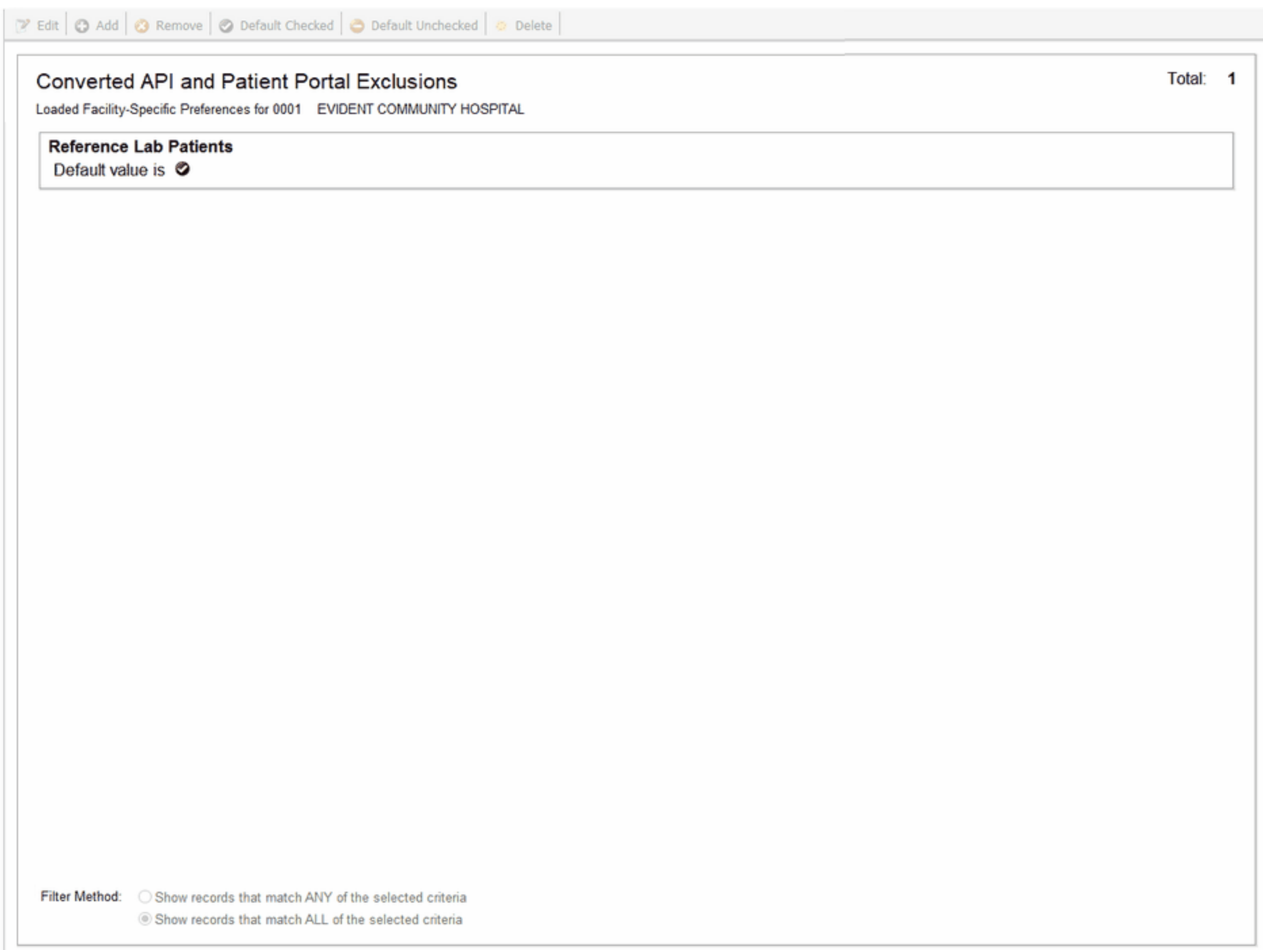
NOTE: *To have access to the Patient and Authorized Representative fields, users will need the Census Behavior Control 'Edit Exclude from API'.*

10.2 Converted Rules

The Patient Portal Exclusions table is now named the Converted Rules table. This table is display only and will list any exclusions that were previously created prior to the creation of the Exclusion Table.

NOTE: *This table is for reference only. All exclusions will now look to the Exclusion Table.*

Select **Hospital Base Menu** > **Master Selection** > **Business Office Tables** > **Table Maintenance** > **HIM** > **Converted Rules**



Converted API and Patient Portal Exclusions

10.3 Exclusions Table

Exclusions may be set up to automatically exclude visits, images, transcriptions, problems, care team members, procedures and lab results from the patient, authorized representation and/or CCDA. Each exclusion type may be broad or specific (i.e. only excluding patients within a particular age range). Exclusions may be applied to the patient (via Patient Portal), Authorized Representative (via Patient Portal), CCDA or any combination of the three. Options to release the exclusions via Medical Records, or to make the unavailable for release, are also available from the patient's chart. Please see the chapter Exclusion Table within Table Maintenance - HIM User Guide for more information on setting up exclusions.

***NOTE**: Portal exclusions could constitute information blocking.*

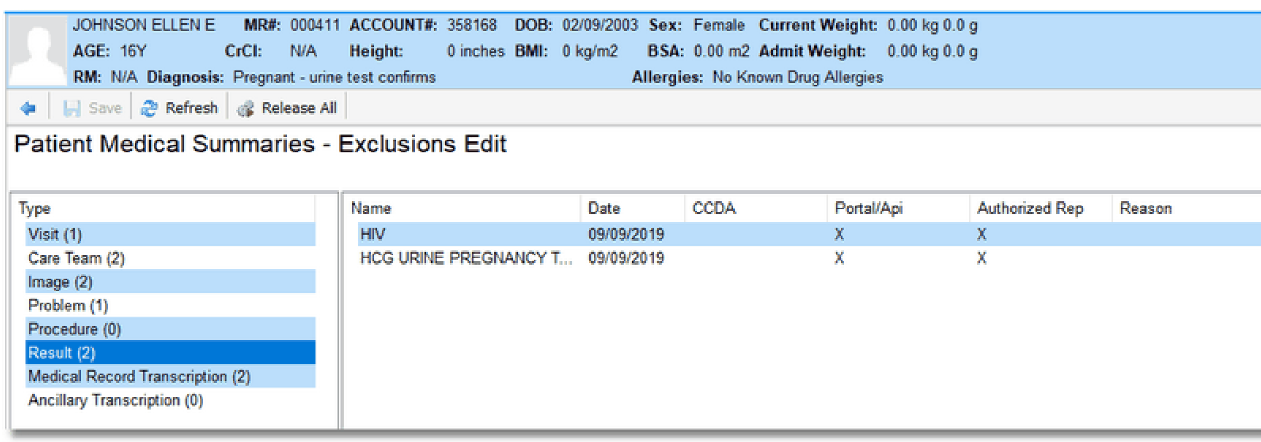
10.4 Chart Level Exclusion

Exclusions set up and applied to a patient's account may be viewed at the chart level in the Patient Medical Summaries - Exclusions Edit screen. Exclusions may be also be manually setup and/or released from this screen.

***NOTE**: Portal exclusions could constitute information blocking.*

Select a Type to display a listing of all item names for the type along with the date the item was added. If an item has been excluded, an 'X' will display in the CCDA, Portal/Api and/or Authorized Rep column to designate where it was excluded from.

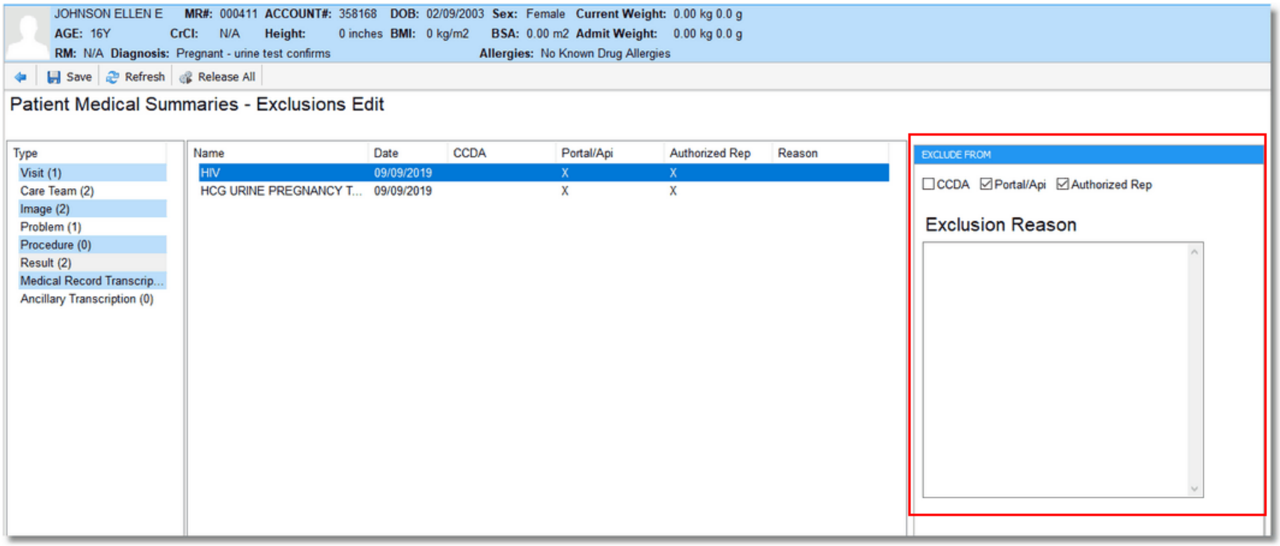
Select **Thrive UX** > **Charts** > **Select Patient** > **Health Information Resource** > **Patient Medical Summaries** > **Edit Exclusions**
or
Select **Hospital Base Menu** > **Patient Account** > **Medical Records** > **Print Electronic Record** > **Account Number** > **Patient Medical Summaries** > **Edit Exclusions**



Patient Medical Summaries - Exclusions Edit

To edit an exclusion, select an item to open the Exclude From panel. This will display options for CCDA, Portal/Api and Authorized Rep. These options may be selected or deselected, as needed, to exclude or release information pertaining to the selected item. An Exclusion Reason may also be added, but is not required. If any changes are made, select **Save** on the action bar.

Select **Thrive UX > Charts > Select Patient > Health Information Resource > Patient Medical Summaries > Edit Exclusions > Select Type > <u>Select Name</u>**



Patient Medical Summaries - Exclusions Edit

There is also an option to release all exclusions on a visit by selecting **Release All** on the action bar. The only exclusions that will not be released are the ones with 'Unavailable for Release' selected in the Exclusion Table.

NOTE: *Exclusions set as 'Unavailable for Release' may only be released if the exclusion is deleted in the Exclusion Table.*

NOTE: *If a patient or Authorized Representative is logged in to the MyCareCorner and exclusions are released, those changes will not be reflected until the patient logs out and then back in.*

Chapter 11 Print Reports

Enter topic text here.

11.1 Patient Portal Access Report

The Patient Portal Audit Log is used to track all activity within the Patient Portal.

How to Print

1. Select **Special Functions** application

2. Select **Audit Log**

3. Select **Patient Portal Access Report**

4. Select printing parameters:
   - **Facility**: Select the desired Facility. (Only Facilities selected for access under that User Based Login will be available for selection.)
   - **User**: Enter the name of the patient or authorized representative being audited. Leave this field blank to run for all users.
   - **User Type**: Enter **P** to audit a patient or enter **AR** to audit an authorized representative. Leave this field blank to run for both patients and authorized representatives.
   - **Date Range**: Enter the date range to be audited.
   - **Patient**: Enter the patients name to be audited. Leave this field blank to run for all patients.
   - **Visit ID**: Enter the patients visit number to be audited. Leave this field blank to run for all visits.
   - **Admitting Physician**: Enter the admitting physicians last name to be audited. Leave this field blank to run for all admitting physicians.
   - **Action**: Enter the action to be audited, such at view, download or transmit etc. Leave this field blank to run for all actions.
   - **Data Accessed**: Enter in the data accessed to be audited. Leave this field blank to run for all data.
   - **Include Cover Sheet**: Select this option to include a Cover Sheet with the report.
   - **Safe Mode**: Select this option if the report would not build due to bad data being in a field. If the report has bad data, a message will appear stating to run report using the Safe Mode. If selected, Safe Mode will replace all of the bad characters with a **?**. This will allow the intended report to generate. The bad data may then be seen and can be corrected from the account level.
   - **Output Format**: Use the drop-down box to select one of the following report Format options:
     - **HTML**
     - **PDF**
     - **XML**
     - **CSV**
     - **MAPLIST**
     - **TXT**

5. Select **Run Report** to display the report in the selected output format.

Description and Usage

The Patient Portal Access Report is used to track all activity within the Patient Portal. It will show if the patient or authorized representative viewed, downloaded, or transmitted the patient summary.

NOTE: *In order to access the Audit Logs, the users login or role will need access to the System Utility application.*

<u>Patient Portal Access Report</u>

06/01/2017 Evident Community Hospital 1
13:35 Patient Portal Access Report patient_portal_audit_log.template
Document was generated by the Thrive EHR Software
05/01/2017 - 06/01/2017

Portal Login: 3276	P/AR: P	Patient: MERRITT ADAM DELANE	Patient Visit ID: 359111	Attending Physician: 3115
05/16/2017 09:24:39	Action: View	Data Accessed: Christy Gomez		
Portal Login: 3276	P/AR: P	Patient: MERRITT ADAM DELANE	Patient Visit ID: 359111	Attending Physician: 3115
05/16/2017 09:24:43	Action: Reply	Data Accessed: Christy Gomez		
Portal Login: 3276	P/AR: P	Patient: MERRITT ADAM DELANE	Patient Visit ID: 359111	Attending Physician: 3115
05/16/2017 09:25:38	Action: View	Data Accessed: Christy Gomez		
Portal Login: 3764	P/AR: P	Patient: SMALL MATT MCKAY	Patient Visit ID: 20001284	Attending Physician: 999999
05/18/2017 17:58:04	Action: View	Data Accessed: Clinical Information		
Portal Login: 3764	P/AR: P	Patient: SMALL MATT MCKAY	Patient Visit ID: 20001284	Attending Physician: 999999
05/19/2017 07:58:26	Action: View	Data Accessed: Clinical Information		
Portal Login: 4281	P/AR: P	Patient: DARENSBOURG MARY BOWSE	Patient Visit ID: 359138	Attending Physician: 1904
05/22/2017 11:36:37	Action: View	Data Accessed: Clinical Information		

Listed below is an explanation of each column:

- **Portal Login:** The ID of the patient or authorized representative who accessed the visit in the patient portal.
- **P/AR:** P will display if a patient accessed the patient portal. AR will display if the authorized representative accessed the patient portal.
- **Patient:** The name on the visit that was accessed in the patient portal.
- **Patient Visit ID :** The visit number that was accessed in the patient portal.
- **Attending Physician:** The physician number of the admitting physician on the visit that was accessed in the patient portal.
- **Date:** The date the visit was accessed in the patient portal.
- **Time:** The time the visit was accessed in the patient portal.
- **Action:** The action that was taken on the visit in the patient portal. The different options for the column are: View, Download, Transmit, Secure Message, API or OBP (Online Bill Pay).
- **Data Accessed:** The data that was accessed in the patient portal.

11.2 Patient Portal Exclusion Report

The Patient Portal Exclusion Report will identify patient accounts that have been automatically or manually excluded from the Patient Portal.

How to Print

1. Select **Report Dashboard**

2. Select **Patient Portal Exclusion Report**

3. Select **Select**

4. Select the desired report sequence.

5. Select printing parameters:
- **Facility**: Select the desired Facility. (Only Facilities selected for access under that User Based Login will be available for selection.)
- **Discharge Date Range**: Enter in a discharge date range for when excluded visits were discharged.
- **Visit ID**: Enter a patient's account number to pull to the report. Leave this field blank to pull all visits.
- **Stay Type**: Enter a stay type to pull patient accounts for a particular stay type. Leave this field blank to pull all stay types.
- **Service Code**: Enter a service code to pull patient accounts for a particular service code. Leave this field blank to pull all stay types.
- **Admitting Physician**: Enter an admitting physician number to pull patient accounts for a particular physician. Leave this field blank to pull all admitting physicians.
- **Exclusion Method**: Enter an **A** to display patient accounts that were automatically excluded from the Patient Portal, or enter an **M** to display patient accounts that were manually excluded from the Patient Portal. Leave this field blank to pull all excluded patient accounts.
- **Include Cover Sheet**: Select this option to include a Cover Sheet with the report.
- **Safe Mode**: Select this option if the report would not build due to bad data being in a field. If the report has bad data, a message will appear stating to run report using the Safe Mode. If selected, Safe Mode will replace all of the bad characters with a **?**. This will allow the intended report to generate. The bad data may then be seen and can be corrected from the account level.
- **Output Format**: Use the drop-down box to select one of the following report Format options:
  - **PDF**
  - **XML**
  - **CSV**
  - **HTML**
  - **MAPLIST**
  - **TXT**

6. Select **Run Report** to display the report in the selected output format

Description and Usage

The Patient Portal provides the patient or the authorized representative the ability to access clinical information associated with a visit. Throughout the system, there are multiple ways to exclude the clinical information from the Patient Portal. These exclusions may be done either manually or automatically. This report will identify those accounts that have been excluded within a discharge date range and will also display how the account was excluded.

Patient Portal Exclusion Report

05/24/2016 Evident Community Hospital 1
15:48 Patient Portal Exclusion Report mr_patient_portal_exclusion_log.template
05/20/2016 - 05/20/2016

Acct Number	Patient Name	Physician Number	Physician Name	Stay Type	Service Code	Disch Date	Disch Time	Exclusion Method (A/M)
20000562	REED GRACE ELLEN	10000	Baxter J	2	LA	05/20/2016	10:30	A

Listed below is an explanation of each column.

- **Acct Number:** Patient account number.
- **Patient Name:** Patient name
- **Physician Number:** Admitting physician number on the excluded patient account.
- **Physician Name:** Admitting physician name on the excluded patient account.
- **Stay Type:** Stay type of the excluded patient account.
- **Service Code:** Service code of the excluded patient account.
- **Disch Date:** The discharge date of the excluded patient account.
- **Disch Time:** The discharge time of the excluded patient account.
- **Exclusion Method (A/M):** This column will display an "A" if the patient account was automatically excluded from the patient portal or "M" if the patient account was excluded manually from the patient portal.

11.3 Visits with Exclusions by Physician

The Visits with Exclusions by Physician report will give a listing of visits that have exclusions on them.

How to Print

1. Select **Report Dashboard**

2. Select **Visits with Exclusions by Physician**

3. Select **Run**

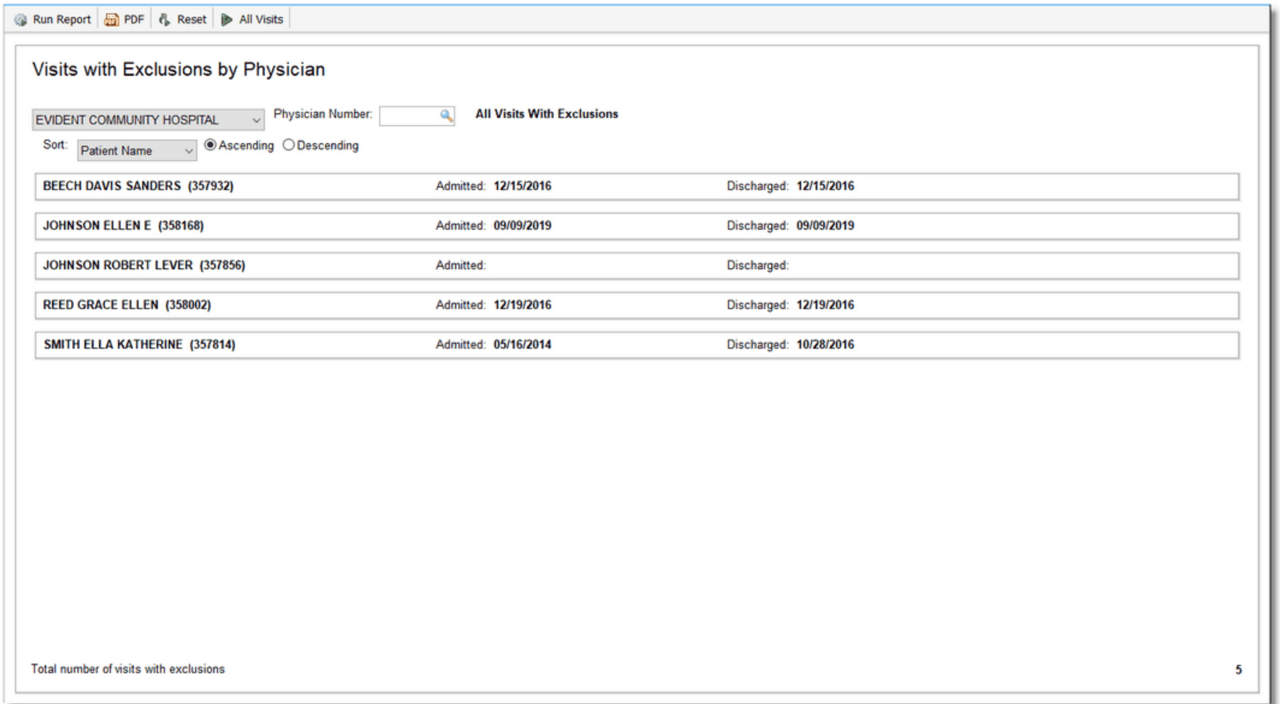
4. Select printing parameters:
   - **Facility**: Select the desired Facility. (Only Facilities selected for access under that User Based Login will be available for selection.)
   - **Physician Number:** Select a physician to only display visits pertaining to the physician. This field may be left blank.
   - **Sort:** The report may be sorted by Visit Number, Patient Name, Admit Date and Discharge Date. A secondary sort is also available to sort by Ascending or Descending order.

5. The action bar options are as follows:
   - **Run Report:** Select this option to run the report once all parameters have been selected.
   - **PDF:** Select this option to display the report in a PDF format.
   - **Reset:** Select this option to reset the parameters for the report.
   - **All Visits:** Select this option to display all visits with exclusions.

Description and Usage

The Visits with Exclusions by Physician report will give a listing of visits that have exclusions on them. This report may be filtered by Facility and Physician to narrow the listing. An 'All Visits' option is also available to get a listing of all visits with exclusions. Once the results display on the screen, a patient may be selected to be taken to the Patient Medical Summaries - Exclusions Edit screen. From here, any exclusions may be released or added to the CCDA, Patient/Api or Authorized Representative.

Visits with Exclusions by Physician



Listed below is an explanation of each column.

- **Patient Name/Visit Number:** The patient name and visit number with an exclusion. Double-click on the patients name to be taken to the Patient Medical Summaries - Exclusions Edit screen.
- **Admitted:** The admit date of the patient.
- **Discharged:** The discharge date of the patient.