



# Thrive Patient Portal

Thrive Patient  
Portal



## Thrive Patient Portal

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*by Evident*

PATIENT CENTERED.  
COMMUNITY FOCUSED.



# Thrive Patient Portal

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# Table of Contents

## Chapter 1 Introduction

Attestation Disclaimer .....	1
What's New .....	1
Patient Portal Exclusions – WR 1810030938 .....	1
Previous V20 WR's .....	2
Access to Non-Discharged Visits in Thrive Patient Portal -- WR 1705311032.....	2
Radiology Transcriptions display in Patient Portal -- WR 1805300919.....	2
Show API Events in Portal Activity Log -- WR 1707141517 .....	2
Thrive Patient Portal Updates -- WR 1705090956.....	2
Thrive Patient Portal Updates -- WR 1608301232.....	3
Thrive Patient Portal 2.1 Updates -- WR1805301511.....	3

## Chapter 2 Overview

## Chapter 3 How the Patient Portal Works

Sending an E-Mail to the Patient .....	7
Resetting the Patient Portal .....	11
What Can and Cannot be Viewed by the Patient .....	13

## Chapter 4 Accessing the Patient Portal

Setting up a Patient Portal Account .....	15
Access via Virtual Chart .....	21
Access via Patient Charting .....	23
Access via Health Information Resource .....	25
Accessing an Existing Patient Portal Account .....	27
Forgot Password .....	28

## Chapter 5 Dashboard

Message Center .....	33
Viewing Messages .....	33
Sending Messages .....	35
Medical Record .....	36
Selecting a Visit .....	38
Upload Documents .....	41
Downloading a CCDA Document .....	44
Transmitting a CCDA Document .....	48
Help Center .....	53
Bill Pay .....	54
Settings .....	54
Profile .....	55
Security .....	56
Activity .....	57

## Chapter 6 Exclusions

Overview .....	61
Converted Rules .....	62
Exclusion Table .....	63
Chart Level Exclusion .....	63

## Chapter 7 Importing Information Submissions within Thrive

Accessing Information Submissions .....	65
Document Queue .....	65

## Chapter 8 Print Reports

Patient Portal Access Report .....	71
How to Print .....	71
Description and Usage .....	72
Patient Portal Exclusion Report .....	73
How to Print .....	73
Description and Usage .....	74
Visits with Exclusions by Physician .....	75
How to Print .....	75
Description and Usage .....	75

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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 **Thrive Patient Portal Application** 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 **Software Services** Support.

#### ***Patient Portal Exclusions -- WR 1810030938***

DESCRIPTION: New functionality has been added to exclude information from a patient's portal and CCDA. The Exclusion Table has been created to have information automatically be excluded based on the following factors: Visit, Images, Transcriptions, Problems, Care Team, Procedures and Results. If anything is excluded from a CCDA, Patient or Authorized Representative, it may be manually released at a later time in the new Patient Medical Summaries - Exclusion Edit screen.

The patient's Consent/Privacy Settings screen has also been updated. Previously the field named Exclude from Portal is now called Patient and the field named Exclude from API is now called Authorized Rep. Each of these new fields will determine if the information is being excluded from the patient on the Patient Portal, or the Authorized Representative on the Patient Portal.

Visits with Exclusions by Physician is a new report created to be able to view all visits with exclusions. The report will also allow the Patient Medical Summaries - Exclusion Edit screen to be accessed directly.

And lastly, the Patient Portal Exclusions table is now called the Converted Rules table. This is a view only table that will display any exclusions set up prior to the Exclusion Table being created.

DOCUMENTATION: See Patient Portal Exclusions, [Converted Rules](#)<sup>[62]</sup>, [Exclusion Table](#)<sup>[63]</sup>, [Chart](#)

[Level Exclusion](#)<sup>[63]</sup> and [Visits with Exclusions by Physician](#)<sup>[75]</sup>.

### ***Previous V20 WR's***

Enter topic text here.

### **Access to Non-Discharged Visits in Thrive Patient Portal -- WR 1705311032**

DESCRIPTION: When accessing the Patient Portal via the Virtual Chart or Health Information Resource screen, patient's may view all discharged and non-discharged visits if they login to the Portal with an existing login. The non-discharged visits will only display in the portal when accessing from the Virtual Chart or Health Information Resource screen.

DOCUMENTATION: See [Access via Virtual Chart](#)<sup>[21]</sup> and [Access via Health Information Resource](#)<sup>[25]</sup>.

### **Radiology Transcriptions display in Patient Portal -- WR 1805300919**

DESCRIPTION: Radiology Transcriptions will only pull to the Thrive Patient Portal if they are orders that do not require esign, signed transcriptions or cosigned transcriptions.

DOCUMENTATION: See [Selecting a Visit](#)<sup>[38]</sup>

### **Show API Events in Portal Activity Log -- WR 1707141517**

DESCRIPTION: The Patient Portal Activity screen has been changed to log activity and limit 3rd party access via an API. The screen is now made up of three areas: Actions, Applications and the Activity Log.

DOCUMENTATION: See [Activity](#)<sup>[57]</sup>

### **Thrive Patient Portal Updates -- WR 1705090956**

DESCRIPTION: This Work Request implemented several changes to the Patient Portal to meet Meaningful Use Stage III requirements. The following areas were updated:

- Additional demographics will now display as "Previous Name" within the Demographics area of the medical record.
- Care Plan section now includes the patient's visit assessment/plan and any hospital orders placed on a clinic account.
- The ability to send a CCDA document to a personal email.
- The ability to sort the Activity Log.
- FiO2 and Metric units have been added to Height, Weight and Temperature within the Vitals section a of a visit.

DOCUMENTATION: See [Selecting a Visit](#)<sup>[38]</sup>, [Transmitting a CCDA Document](#)<sup>[48]</sup>, and [Activity](#)<sup>[57]</sup>



### **Thrive Patient Portal Updates -- WR 1608301232**

DESCRIPTION: This Work Request implemented several changes to the Patient Portal to meet Meaningful Use Stage III requirements. The following areas were updated:

- New demographics were added to the Account screens
- Activity Log now displays the transmission type and transmission email address
- Medical Records may now be searched to display accounts within a specific date range
- Several sections within each account have been updated to display more specific information for that visit
- CCDA links changed from the Referral/Transition of care to the Referral Note along with new link for access to the Discharge Summary.

DOCUMENTATION: See [Selecting a Visit](#)<sup>[38]</sup>, [Downloading and Transmitting](#)<sup>[44]</sup>, and [Activity](#)<sup>[57]</sup>.

### **Thrive Patient Portal 2.1 Updates -- WR1805301511**

DESCRIPTION: This Work Request implemented several changes to the Patient Portal. The following areas were updated:

- Facility specific URLs were created. When a patient logs into thrivepatientportal.com, the patient will be redirected to a different URL with the facility name displaying at the end. Patients may also go directly to the facility specific URL to log in.
- Added the chief complaint to the inbox, the drop down within new message and sent message(s).
- The disclaimer message "If this is an emergency, please dial 911" was added to new messages and displays below the reply field.
- Username requirements and validations now display on the registration screen.

DOCUMENTATION: See [Sending an E-Mail to the Patient](#)<sup>[7]</sup>, [Setting up a Patient Portal Account](#)<sup>[15]</sup>, [Viewing Messages](#)<sup>[33]</sup> and [Sending Messages](#)<sup>[35]</sup>.



## Chapter 2 Overview

The Patient Portal is a purchased application that allows patients to view their patient summaries online at <https://www.thrivepatientportal.com>, via facility-purchased applications (i.e., Clinical Summary, Online Bill Pay, Secure Messaging, etc.)

The Patient Portal must be utilized in order to achieve the Meaningful Use objectives for MU Stage 1 2014 and MU Stage 2.



## Chapter 3 How the Patient Portal Works

### 3.1 Sending an E-Mail to the Patient

In order for patients to have access to the Patient Portal, they will need to receive an email inviting them to register on the website. 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 the website, but there will not be any clinical information to view. Once the patient has a discharged visit, the clinical information for that visit will be available to view on the patient portal.

The email sent to the patient will include a hyperlink to access the Patient Portal <https://www.thrivepatientportal.com> as well as instructions on how to access the account. The email invite will expire 48 hours 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.

**NOTE:** If the patient does not register on the website when the email is initially received, the patient will get another email at the next visit. The patient WILL NOT receive another email for any future visits once registered on the Patient Portal. The portal hyperlink will display a facility specific URL (<https://www.thrivepatientportal.com/facilityname>) once the patient logs in using the above portal URL. The facility specific URL may also be used to log in to the portal.

Select **Hospital Base Menu > Profile Listing > Select Patient**

**Accounts Receivable - Person Profile**  
Evident Community Hospital  
Signed On Emp: JPU Dept: 001

Base Screen Create New Visit Create Temp Visit Patient Charting Images Misc Options Scheduling

Name: REED GRACE ELLEN Social Security: 1000010597 \*\* Patient \*\* Person Profile#: 00013799  
Date Created: 05/19/2016

Demographics | Contact/Billing Info | Clinical Info

**Demographic Information**

Last Name: REED  
First Name: GRACE  
Mid Name: ELLEN  
Full Name: REED GRACE ELLEN  
Birth Date: 02/09/1983 33 YEARS  
MedRec #: 700119 New  
Sex: F  
Country: US USA  
Address1: 6600 WALL ST  
Address2:  
City: MOBILE  
State/Zip: AL 36695  
County: MOB MOBILE  
Phone: 251-639-8200  
Cell Phone:

Email: elle@email.com  
Physician: 000000 INVALID  
Sec Name:  
Maiden Name:  
Religion:  
Church:  
Race: W WHITE  
Ethnicity: N Not Hispanic or Latino  
Military:

Birth Place:  
Language: eng English  
Expired Date:  
Confidential:  
Marital: M  
Smokeless Tobacco: 4 Never chewed tobacco  
Smoker: 4 Never smoker  
Smoke StDt:  
Smoke EndDt:

Visit#	From Date	Thru Date	Service	Balance	Bad Debt
20000562	05/20/2016	05/20/2016	LAB	229.00	.00
30001180	05/19/2016	05/19/2016	E/R	674.00	.00

Visit Listing A/R Bal: 903.00 Bad Bal: .00 Ins Bal: .00 Pat Bal: 903.00

Show History Ready

Accounts Receivable - Person Profile

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, the portal 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 Patient Portal, he will see his visits plus Grace's visit for today where he is loaded as the authorized representative.

Select **Hospital Base Menu > Profile Listing > Select Patient > Create New Visit**

Visit Information

Manually Assign Visit Number? ☐ Yes ☒ No

Stay Type:

Physician:  Baxter J

Service Code:  E/R

Guarantor:  REED GRACE ELLEN

Fin. Class:  BCBS

Patient Portal Authorized Rep:

Restrict Payer Disclosure ☐

Select insurance coverage for this visit:

<input checked="" type="checkbox"/> Select	Code	Insurance Name	Primary
<input checked="" type="checkbox"/>	BB	BCBS	Y

OK Cancel

Accounts Receivable - Visit Information

The email address for the patient or authorized representative may be entered at any time during patient registration.

Select **Hospital Base Menu > Profile Listing > Select Patient > Create New Visit > Ok**

The screenshot displays a patient registration form for Evident Community Hospital. The form is titled "Accounts Receivable - Registration and ADT" and includes a navigation bar with tabs for ER Log, MSP, Patient Data, Note Entry, Images, Forms, ADT Functions, and Misc Options. The patient's name is REED GRACE ELLEN, and the account number is 30001278. The form is divided into several sections: Demographic Information, County, Birth Date, Birth Place, SocSec #, MedRec #, Sex, Marital, AdDir, Military, Smokeless Tobacco, Smoker, Smk StDt, Smk EndDt, Religion, Church, Race, Ethnicity, Language, Expired Dt, Identifier, and Employer Information. The email address "ellie@email.com" is circled in red. The form also includes fields for Stay Type, Sub Type, Service Code, Last Name, First Name, Mid Name, Full Name, Maiden Name, Confidential, Country, Address1, Address2, City, State/Zip, and Phone.

Demographic Information	
Stay Type:	3 E/R
Sub Type:	
Service Code:	ER E/R
Last Name:	REED
First Name:	GRACE
Mid Name:	ELLEN
Full Name:	REED GRACE ELLEN
Maiden Name:	
Confidential:	N
Country:	US USA
Address1:	6600 WALL ST
Address2:	
City:	MOBILE
State/Zip:	AL 36695

County	
County:	MOB MOBIL
Phone:	251-639-8200
Cell Phone:	
Email:	ellie@email.com
Birth Date:	02/09/1993 33 YEARS
Birth Place:	
SocSec #:	
MedRec #:	700119 New
Sex:	F
Marital:	M
AdDir:	N
Military:	
Smokeless Tobacco:	4
Smoker:	4 Never smoker
Smk StDt:	
Smk EndDt:	

Religion	
Religion:	
Church:	
Race:	W WHITE
Ethnicity:	N Not Hispanic or Latino
Language:	eng English
Expired Dt:	
Identifier:	

Employer Information	
Employer:	EVIDENT
Address1:	6600 WALL ST
Address2:	
City:	MOBILE
State/Zip:	AL 36695
Phone:	251-639-8200

Accounts Receivable - Registration and ADT

Select the **Contact** tab to enter the Patient Portal Authorized Representative.

Select **Hospital Base Menu > Profile Listing > Select Patient > Create New Visit > OK > Contact**

The screenshot displays the 'Accounts Receivable - Registration and ADT' form for Evident Community Hospital. The patient is REED GRACE ELLEN, Account: 30001278. The 'Contact' tab is active. The 'Patient Portal Authorized Representative' section is highlighted with a red circle. It contains the following information:

- Name: REED JOHN N
- Email: john@email.com
- Relation: SPOUSE

Other sections visible include Spouse, Parent, and Notify in Emergency.

Accounts Receivable - Registration and ADT

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.



### 3.2 Resetting the Patient Portal

If a patient or authorized representative needs a new link to the portal, selecting Portal Reset from the visit will send a new email to the patient and/or authorized representative's email address.

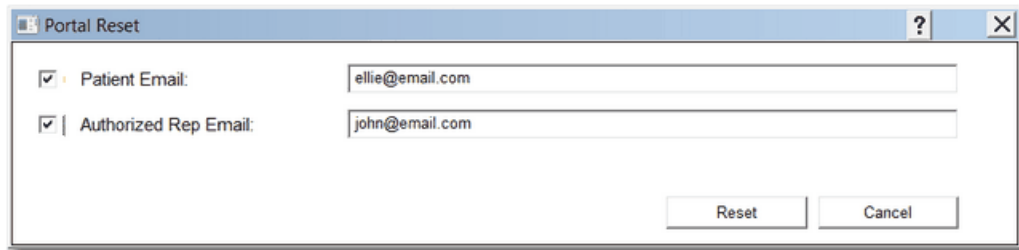
Select **Hospital Base Menu > Profile Listing > Select Patient > Misc Options**

The screenshot shows the 'Evident Community Hospital' patient portal management interface. The top navigation bar includes 'Accounts Receivable - Registration and ADT' and 'Signed On Emp: JPJ Dept. 001'. The main menu has tabs for 'ER Log', 'MSP', 'Patient Data', 'Note Entry', 'Images', 'Forms', 'ADT Functions', and 'Misc Options'. The 'Misc Options' dropdown is open, showing options like 'Send Notification', 'Delete Acct', 'Copy From Profile', 'Rx Elig', 'Portal Reset', 'Check In', and 'Locations Summary'. A blue arrow points to 'Portal Reset'. The patient's information is displayed below the menu, including demographic details (Name: REED GRACE ELLEN, Account: 30001278, Room: MOB), contact information (Phone: 251-639-8200, Email: ellie@email.com), and employer information (Employer: EVIDENT, Address: 6600 WALL ST, City: MOBILE, State/Zip: AL 36695).

Registration and ADT - Portal Reset

When selected, the patient and/or authorized representative's email address may be changed before the email is resent. If the email address is changed, the change will be updated on the visit.

Select **Hospital Base Menu > Profile Listing > Select Patient > Misc Options > Portal Reset**

A screenshot of a software dialog box titled "Portal Reset". The dialog box has a blue header bar with a question mark icon and a close button (X). Inside the dialog, there are two rows of input fields. The first row is labeled "Patient Email:" and contains a text box with the email address "ellie@email.com". The second row is labeled "Authorized Rep Email:" and contains a text box with the email address "john@email.com". Both rows have a checked checkbox to their left. At the bottom right of the dialog, there are two buttons: "Reset" and "Cancel".

Registration and ADT - Portal Reset

**NOTE:** If the patient or authorized representative calls in to request changes be made to the email address, measures will need to be put in place to ensure that the person requesting the change is who they say they are.

### 3.3 What Can and Cannot be Viewed by the Patient

The Summary of Care will always be an option for each account listed. The Referral Note and the Discharge Summary options will only be present if they were edited or submitted to a provider within the patient's chart.

Select **Thrive Patient Portal > Login > Medical Record**

The screenshot shows the 'Medical Record' section of a patient portal. At the top, there's a teal header with a menu icon and the text 'Medical Record'. Below this is a breadcrumb trail: '← REED GRACE ELLEN (30001295)'. The main content area is divided into several sections. The first section is a patient summary card for 'REED GRACE ELLEN', a 33-year-old female. It includes her birth date (Feb 9, 1983), address (100 ECOR ROUGE AVE, FAIRHOPE AL 36532), language (English), ethnicity (Not Hispanic or Latino), and race (WHITE). It also lists her contact information: email (jill.johnson@evident.com) and two phone numbers ((251) 639-1234 and (251) 639-4321). The second section details her hospital admission and discharge: 'Admitted 05/20/2016 12:00, Discharged 05/20/2016 04:21' with a diagnosis of 'STOMACH PAIN'. It notes she 'Never chewed tobacco' and is a 'Never smoker'. The hospital is 'EVIDENT COMMUNITY HOSPITAL' at '2758 WALL ST, MOBILE AL 36695' with phone number '(517) 437-4451'. Below this, there are two links: 'Transmit, download or print Summary of Care document' and 'Transmit, download or print Transfer/Referral of Care'. A blue arrow points to the second link. The bottom section is split into two columns. The left column is titled 'Discharge Summary' and contains text about her admission and discharge from Evident Community Hospital on 05/20/2016. The right column is titled 'Care Team (2)' and lists two physicians: Katherine Williams (Attending Physician) and Baxter James MD (Primary Physician), both with their addresses and phone numbers.

Medical Record

← REED GRACE ELLEN (30001295)

**REED GRACE ELLEN**  
Female, 33 years old at time of visit

Born Feb 9, 1983  
100 ECOR ROUGE AVE  
FAIRHOPE AL 36532

English  
Not Hispanic or Latino  
WHITE

Admitted 05/20/2016 12:00, Discharged 05/20/2016 04:21  
STOMACH PAIN  
Never chewed tobacco  
Never smoker

jill.johnson@evident.com  
(251) 639-1234  
(251) 639-4321

EVIDENT COMMUNITY HOSPITAL  
2758 WALL ST  
MOBILE AL 36695  
(517) 437-4451

[Transmit, download or print Summary of Care document](#)  
[Transmit, download or print Transfer/Referral of Care](#)

**Discharge Summary**

You were admitted to Evident Community Hospital on 05/20/2016 12:00 with a principal diagnosis of Disorder of gallbladder

You were discharged from Evident Community Hospital on 05/20/2016 16:21

Should you have any questions prior to discharge, please contact a member of your healthcare team. If you have left the hospital

**Care Team (2)**

Katherine Williams  
6600 Wall St Mobile AL 36695  
(251) 639-8200  
Attending Physician

Baxter James MD  
1234 Medical Drive Mobile AL 36608  
(251) 510-9987  
Primary Physician

**View Clinical Information**

The Patient Summary may be accessed and edited from different locations in the system. For more information on how to do this, refer to the [Patient Summary CCD](#) document.



## Chapter 4 Accessing the Patient Portal

### 4.1 Setting up a Patient Portal Account

The following steps illustrate how the Patient Portal works for patients who attempt to access their patient account information via the Internet.

1. After selecting the hyperlink in the email, the patient is taken to the Portal - Registration, User Information screen.

Select Patient Portal Hyperlink > **Portal - Registration User Information**

The screenshot shows a web form titled "Registration" with a teal header. The main content area is titled "User Information" and contains the instruction "Please enter the following information" with a note that an asterisk indicates a required field. The form includes several input fields: "Profile Number" (with the value "1993"), "Date of Birth" (with a calendar icon and the format "M/D/YYYY"), "Email Address", "+1 Phone Number", "Username" (with a note "Must be at least 3 characters"), "Password" (with a note "Must be at least 8 characters"), and "Confirm Password". To the right of the "Username" and "Password" fields, there are two bulleted lists of criteria. The "Username" criteria are: "Must be at least 3 characters", "Must contain no special characters", "Must contain no spaces", and "Must be no longer than 15 characters". The "Password" criteria are: "Must be at least 8 characters", "Must contain one uppercase letter", "Must contain one lowercase letter", "Must contain one number", and "Must contain special character". Below the input fields is a checkbox labeled "I verify that the information I have entered above is correct and my own personal information.\*". At the bottom left of the form is a "REGISTER" button. Below the form is a link: "Please click [here](#) to login if you have already registered." In the bottom right corner of the page, there is a link: "BACK TO TOP".

Portal Registration - User Information

2. The required fields the patient must populate will be highlighted in red and indicated with an asterisk. The registration screen will display the following fields:
  - **Profile Number:** Displays the profile number of the person receiving the email, or being registered for the portal from a launch point within Thrive and is not accessible for the patient to change at the time of registration. This field is **required** for portal registration.
  - **Date of birth:** Allows the patient's date of birth to be populated with a two digit month, two digit date and a four digit year (DD/MM/YYYY). It should match the date of birth that is stored for that person on their profile in Thrive. If the date of birth is entered incorrectly, the user will not be able to proceed to the username and password fields. This field is **required** for portal registration.
  - **Email Address:** Displays the email address of the user that accessed the registration screen from the email invite, or it will be the email address of the user that is registering from a launch point within Thrive. The email address will pull from the address loaded in Census for the patient. If the patient does not have an email address in the Email Address field within Census, the email address field may remain blank. This is not a required field for portal registration.
  - **1+ Phone Number:** Allows a ten digit phone number to be entered into the field. If the phone number is entered incorrectly, the alert "Invalid phone number" will appear in red beneath the phone number field.
  - **Username:** Allows the user to choose a unique user name that must meet all four criteria displayed on the Portal - Registration screen. This field is **required** for portal registration.
  - **Password:** Allows the user to enter a unique password that must meet all five criteria displayed on the Portal - Registration screen. If the password does not meet all five criteria the alert "Password doesn't meet the requirements" will display in red under the Password field. This field is **required** for portal registration.
  - **Confirm Password:** Allows the user to re-enter the same password as the Password field. This field must match and meet all of the requirements of the Password field. This field is **required** for portal registration.
3. The patient must select the "I verify..." check box. The check box is a **required** field for portal registration, all users registering must verify that they are the person registering at the time of registration.
4. Once all required fields are completed the patient may then select the **Register** option. This option will enable once all required fields have been addressed.


**NOTE:** If the user already has a username and password, select "Please Click here to login if you have already registered". See [Accessing an Existing Patient Portal Account](#)<sup>27</sup> for additional information.


5. The patient will then be prompted to select an avatar. Once an avatar has been selected, select **Submit** to continue.

Select Patient Portal Hyperlink > Portal - Registration User Information > Register

Portal - Registration

Please select an avatar





Portal Registration - Avatar Selection

6. The patient is prompted to set up three different security questions and must answer ALL of them. These will be used in the event of the patient forgetting his or her password. Once the security questions are set, the patient must select **Submit**.

Select **Patient Portal Hyperlink > Portal - Registration User Information > Register > Avatar > Submit**

Portal - Registration

### Security Questions

Please select/answer 3 security questions.

Security Question 1:  
In what city did you meet your spouse/significant other?

Answer 1:  
Mobile

Security Question 2:  
In what city does your nearest sibling live?

Answer 2:  
Mobile

Security Question 3:  
In what county were you born?

Answer 3:  
Mobile

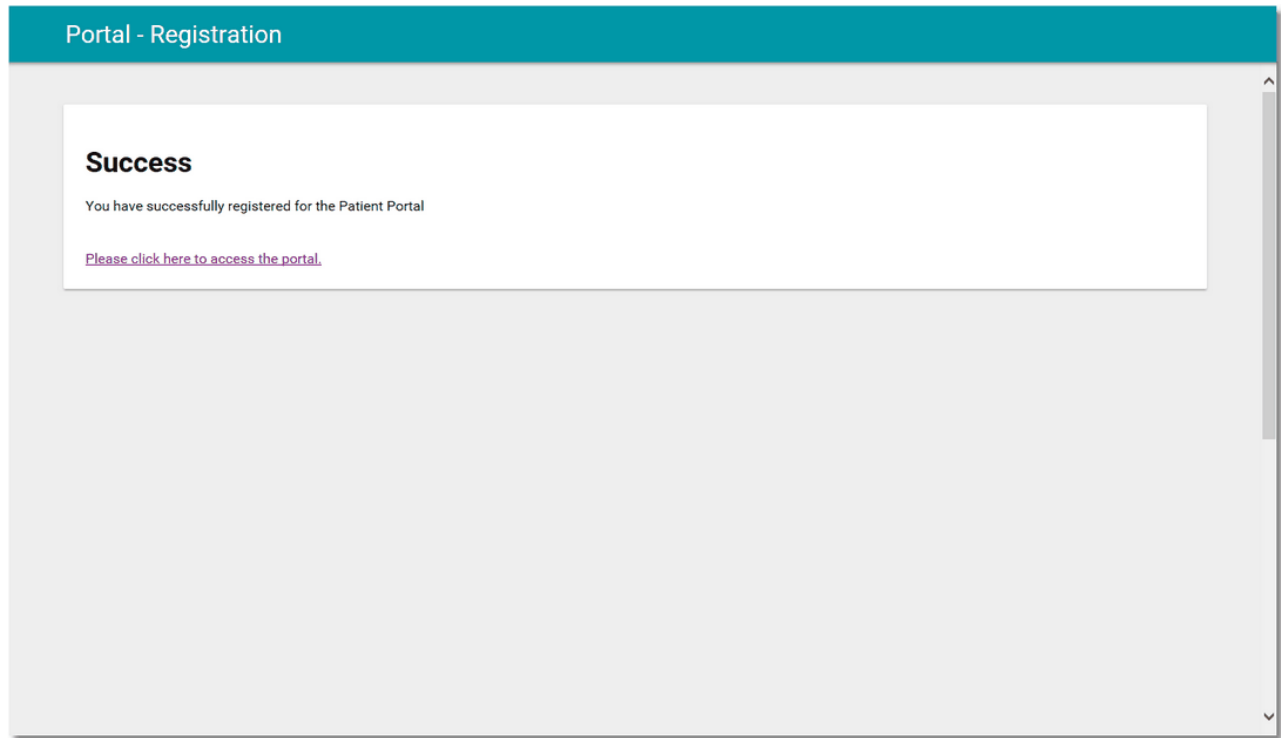
**SUBMIT**

Portal Registration - Security Questions



7. The patient is then taken to a Patient Portal confirmation screen. From this screen, the patient may select "**Please click here...**" to continue to the Patient Portal.

Select **Patient Portal Hyperlink** > **Portal - Registration User Information** > **Register** > **Avatar** > **Submit** > **Security Questions** > **Submit**

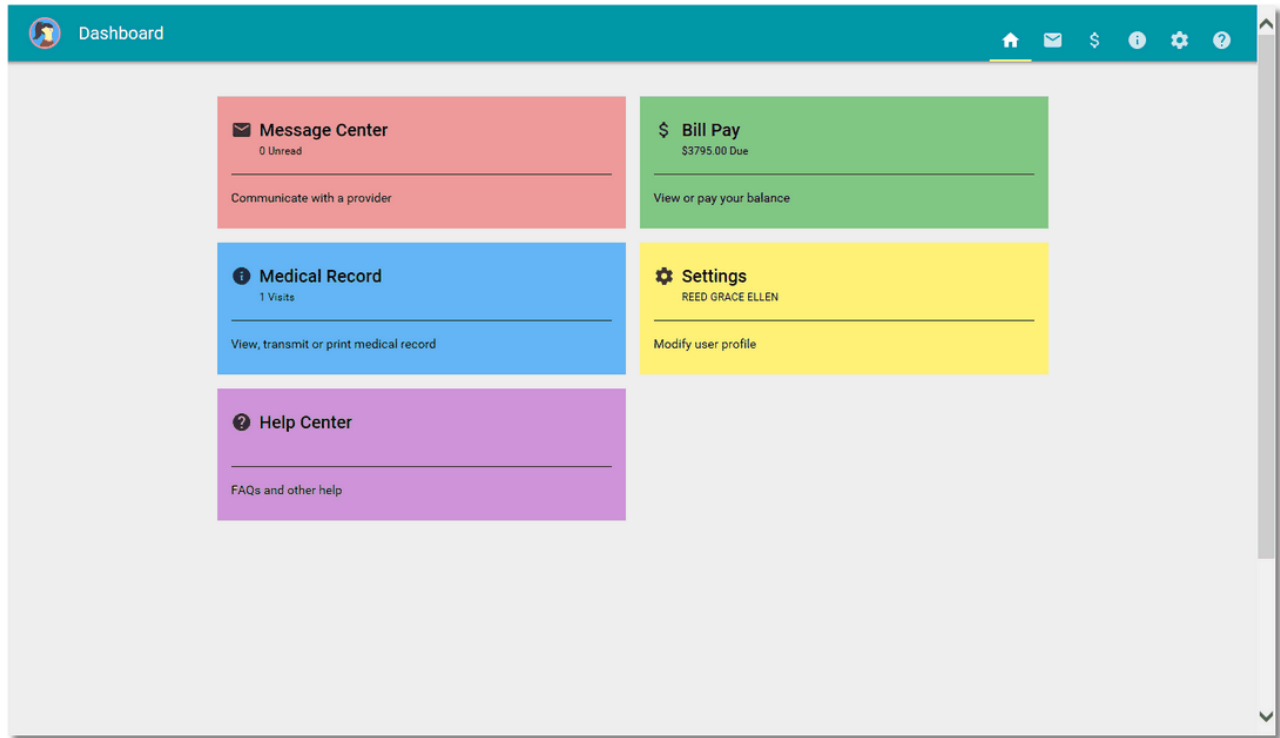


Portal Registration - Success Screen

8. From this screen, the patient may select the action he or she would like to take, such as Message Center, Medical Record or Bill Pay.

**NOTE:** Only Thrive applications the facility has purchased from Evident or TruBridge will display. For more information on how to use the Bill Pay option, please contact a TruBridge representative.

Select Patient Portal Hyperlink > Portal - Registration User Information > Register > Avatar > Submit > Security Questions > Submit > [Click here to access the portal](#)



Patient Portal - Dashboard

## 4.2 Access via Virtual Chart

An option to access the Patient Portal may be available on any of the tabs in a patient's virtual chart. To add this option to one of the tabs, please refer to the [POC Setup](#) user guide. The Patient Portal option will be accessible once the patient has an admit date.

The patient's clinical information will be available for viewing prior to discharge **ONLY** when the Patient Portal launch option is selected.

Select **POC White Board > Patient > Virtual Chart Tab**

The screenshot displays the Evident Community Hospital Patient Care interface for patient REED GRACE ELLEN (TB102644). The interface includes a top navigation bar with tabs like Patient Care, Pharmacy, Diabetic Record, Order Entry/Review, Charges, MultiDisc, ChartLink, and Medical Records. A central menu is open, listing various reports and documents. A blue arrow points to the 'Patient Portal' option in this menu. Other visible elements include a 'Vital Signs' section with fields for B/P, Pulse, Resp, Temp, and O2 Sat, and a 'Staff Communication' section.

Virtual Chart - Patient Portal

**NOTE:** When accessing the Patient Portal through the Virtual Chart, an entry will be created in Release of Information for View, Download, Transmit Measure A.

Once selected, Internet Explorer will open and allow the patient to complete the information to register on the Patient Portal.

**NOTE:** *If the patient or authorized representative has previously registered on the Patient Portal, the patient may select "**Please click here to login...**" to login with an existing username/password at the bottom of the screen. If selected, the patient will be able to view all previously discharged visits as well as any non-discharged visits. Keep in mind the non-discharged visits will only display when accessing the portal from this screen. See [Accessing an Existing Patient Portal Account](#)<sup>27</sup> for additional information.*

**NOTE:** *When an employee accesses the Patient Portal option in the Virtual Chart, the EPHI Patient Audit Log will be updated.*

### 4.3 Access via Patient Charting

An option to access the Patient Portal may be available in Patient Charting for facilities using Thrive Provider EHR. The Patient Portal option will be accessible once the visit has an admit date.

The patient's clinical information will be available for viewing prior to discharge **ONLY** when the Patient Portal launch option is selected.

Select **Clinic Base Menu > Patient Profile > Patient Account**

The screenshot displays the 'AR Hospital - Visit Screen' for patient REED ELLEN GRACE. The interface includes tabs for Patient Functions, Transaction Entry, Receipting, Add Insurance, Check In, Call Back, Patient Charting, and Misc Options. The Patient Charting menu is open, showing options: Narrative, Electronic Forms, Vital Signs, Patient Image, Print Reports, Patient Portal (highlighted with a red circle), and Cancel. The background shows patient information, including Name, Social Security, Visit Number, Billing Information, and Visit Information.

A/R Date	Serv Date	Type	RevCode	Item	Qty	Charge
11/17/15		CHG	INVD	1000	1.00	132.0
11/17/15		CHG	521	10099	1.00	310.1
11/17/15		CHG	300	3520	1.00	37.0
11/30/15	11/17/15	CHG	INVD	7670003	1.00	15.0
11/30/15	11/17/15	CHG	INVD	7670003	1.00	15.0
11/30/15	11/17/15	CHG	300	350232	1.00	35.0
03/28/16		NOTE	S	STATEMENT-1 03/28/16CYCLE: 2		
05/18/16		NOTE	S	STATEMENT-2 05/18/16CYCLE: 2 COLLECT: 2		

Patient Charting

**NOTE:** When accessing the Patient Portal through Patient Charting, an entry will be created in Release of Information for View, Download, Transmit Measure A.

Once selected, Internet Explorer will open and allow the patient or authorized representative to complete the information to register on the Patient Portal.

**NOTE:** If the patient or authorized representative has previously registered on the Patient Portal, the patient may select "**Please click here to login...**" to login with an existing username/password at the bottom of the screen. See [Accessing an Existing Patient Portal Account](#)<sup>27</sup> for additional information.

**NOTE:** When an employee accesses the Patient Portal option in the Virtual Chart, the EPHI Patient Audit Log will be updated.

## 4.4 Access via Health Information Resource

An option to access the Patient Portal may be available within the Health Information Resource (HIR) application. The Patient Portal option will be accessible once the visit has an admit date.

The patient's clinical information will be available for viewing prior to discharge **ONLY** when the Patient Portal launch option is selected.

Select Charts > Patient Chart > Health Information Resource

REED GRACE ELLEN MR#: 700122 ACCOUNT#: TB102644 DOB: 02/09/1983 Sex: F Current Weight: 0 lbs 0.00 kg 0.00 g  
AGE: 33 CrCl: N/A Height: 0.00 inches BMI: 0 kg/m2 BSA: 0.00 m2 Admit Weight: 0 lbs 0.00 kg 0.00 g  
RM: 022-2 Diagnosis: APPENDIX REMOVAL Allergies: CEFACLOR

Import from Inbox

### Health Information Resource

Health Information Resource	Type
Patient Portal	Links
HIRP Patient Session	Links
Google URL Session	Links

Health Information Resource

**NOTE:** When accessing the Patient Portal through the HIR application, once the patient or authorized representative has logged in to the portal, an entry will be created in Release of Information for View, Download, Transmit Measure A.

Once selected, the Patient Portal will launch within Patient Care Portal allowing the patient or authorized representative to complete the information to register on the Patient Portal.

**NOTE:** *If the patient or authorized representative has previously registered on the Patient Portal, the patient may select "**Please click here to login...**" to login with an existing username/password at the bottom of the screen. If selected, the patient will be able to view all previously discharged visits as well as any non-discharged visits. Keep in mind the non-discharged visits will only display when accessing the portal from this screen. See [Accessing an Existing Patient Portal Account](#)<sup>27</sup> for additional information.*

**NOTE:** *When accessing the Patient Portal from the HIR application, the Patient Audit Log will be updated as a Query of "Patient Chart HIR Patient Portal Access".*




## 4.5 Accessing an Existing Patient Portal Account

When a patient has already registered a patient portal account, they may access the login screen by either selecting "Please Click here to login if you have already registered" from the Portal - Registration, User Information screen, or by accessing the patient portal website (<https://www.thrivepatientportal.com>).

**NOTE:** Any patient that has previously set up a patient portal account via [www.mymedicalencounters.com](http://www.mymedicalencounters.com) will be able to use the same Login information for the [www.thrivepatientportal.com](https://www.thrivepatientportal.com). If the facility is using Thrive Patient Portal and the patient attempts to sign into [www.mymedicalencounters.com](http://www.mymedicalencounters.com), a screen will display alerting the user that "This website has been moved! Please reset your bookmark to [www.thrivepatientportal.com](https://www.thrivepatientportal.com). If you are not automatically redirected, click here" and then the patient will be redirected to the Thrive Patient Portal website. The patient will be automatically logged in when redirected and the Security screen will display for the patient to create new security questions and answers.

Select Thrive Patient Portal > Please Click here to login if you have already registered or Select website address

Portal Login

Once the Username and Password have been entered select the Login icon  to gain access to the portal.

Selecting the check box **Keep me signed in** will allow the patient to remain signed into his or her patient portal account.

If the patient enters the incorrect password they will be notified by an alert that will display as "Invalid Login" below the Password field. If the patient is unsure of their password, select **Forgot Password?**. This option will allow the patient to reset his or her password. See [Forgot Password](#) for additional information.

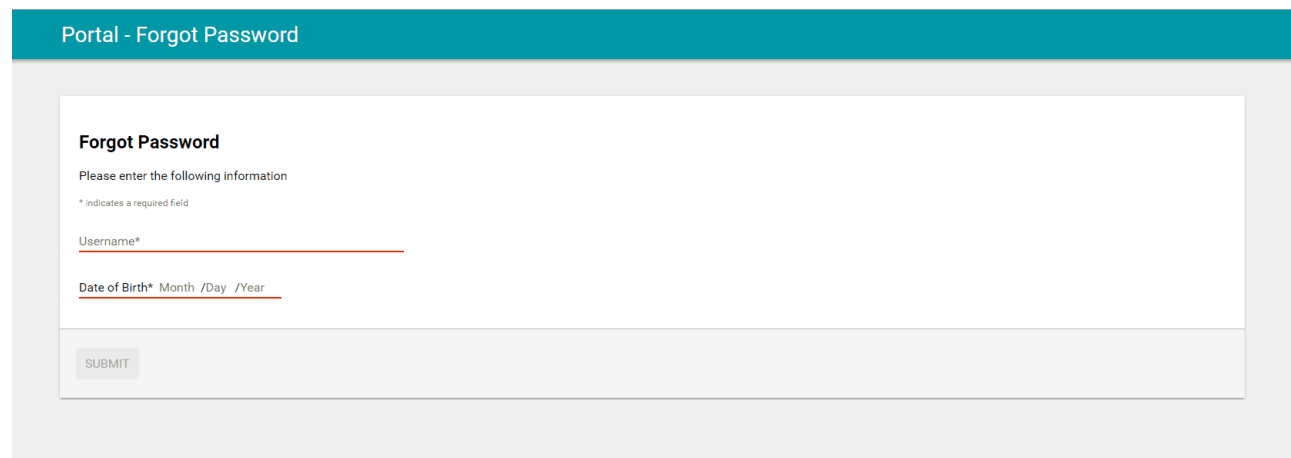
**NOTE:** If the patient or authorized representative has unsuccessfully signed into the portal 5 times, his or her account will be locked and they will need to contact their facility to receive a new portal invite or be re-registered for the portal via one of the software links. See [Resetting the Patient Portal](#) for additional information.

### Forgot Password

If a patient has forgotten his or her password, select **Forgot Password?**. Selecting Forgot Password will launch the Portal - Forgot Password screen. The patient must enter his or her username and date of birth. Once those fields have been addressed the Submit option will become enabled.

Select **Submit**.

Select **Thrive Patient Portal > Forgot Password?**



Patient Portal - Forgot Password

The patient will then enter the answers to the security questions that were created when the patient originally setup the Patient Portal Account. Once security questions have been addressed, the Submit option will become enabled.

Select **Submit**.

Select Patient Portal Hyperlink > Forgot Password? > Submit

Portal - Forgot Password

**Forgot Password**  
Please answer the following security questions:  
What is your oldest sibling's birthday month and year?(e.g.,January 1900)  
Answer  
What is the middle name of your oldest child?  
Answer  
What year did you graduate from High School?  
Answer  
SUBMIT

Patient Portal - Security Questions

The patient may then update his or her password. Updating the password will need to match ALL of the criteria that displays on the screen. Once the password has been confirmed the Submit option will become enabled.

Select **Patient Portal Hyperlink > Forgot Password? > Submit > Address Security Questions > Submit**

Portal - Forgot Password

**Forgot Password**

Please update your password:

\* indicates a required field

Password\*

Confirm Password\*

Passwords should match the following criteria:

- \* Must be at least 8 characters
- \* Must contain one uppercase letter
- \* Must contain one lowercase letter
- \* Must contain one number
- \* Must contain one special character

SUBMIT

Patient Portal - Update Password

Select **Submit** to update the password.

**NOTE:** If a patient or authorized representative has unsuccessfully signed into the portal 5 times, his or her account will be locked. They will need to contact their facility to receive a new portal invite or be re-registered for the portal via one of the software links. See [Resetting the Patient Portal](#)<sup>11</sup> for additional information.

Select **Patient Portal Hyperlink > Forgot Password? > Submit > Address Security Questions >\_Submit > Password Update > Submit**

Portal - Forgot Password

**Success**

You have successfully updated your password.

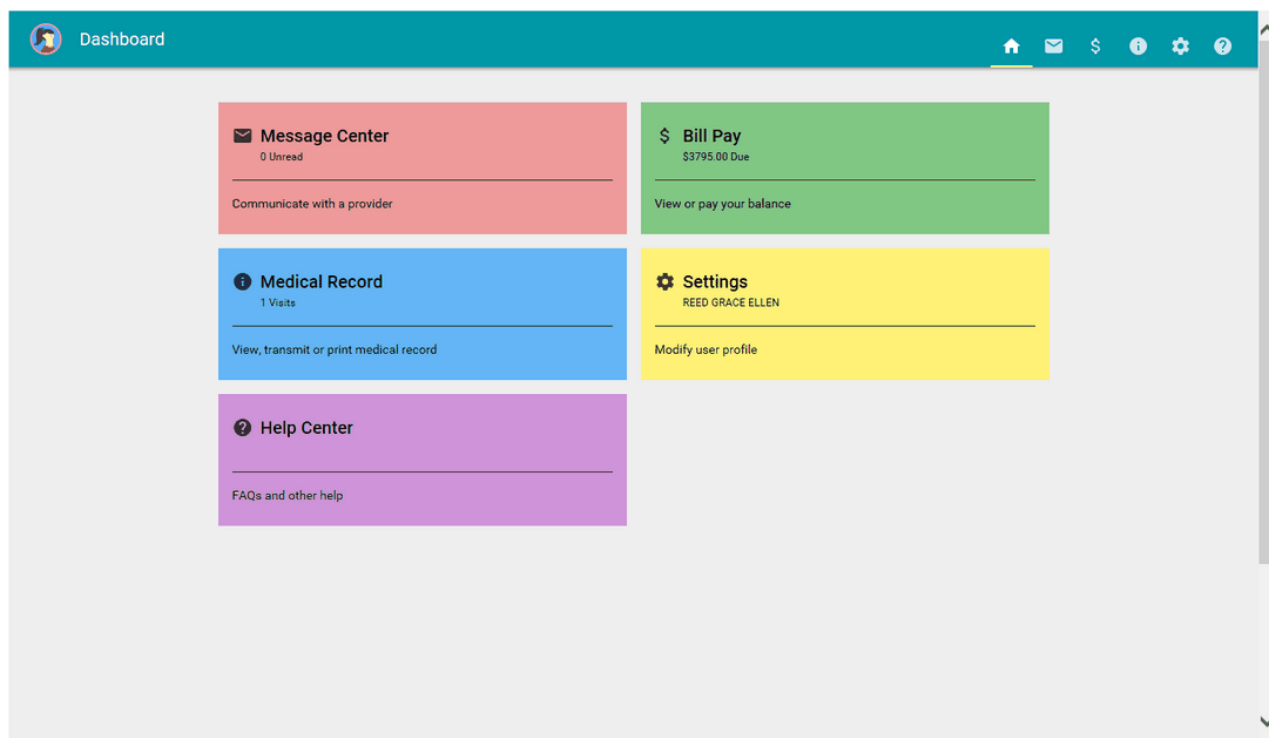
[Please click here to login to the portal.](#)

Patient Portal - Successful Password Update

## Chapter 5 Dashboard







The dashboard for the Patient Portal allows access to the following areas of the portal: Message Center, Medical Record, Help Center, Bill Pay and Settings.

Select **Thrive Patient Portal** > **Login**



Patient Portal - Dashboard

The following options are also available from the action bar and are accessible from any are of the Portal:

-  : Allows access to the Dashboard.
-  : Allows access to the [Message Center](#).<sup>[33]</sup>
-  : Allows access to [Bill Pay](#).<sup>[54]</sup>
-  : Allows access to the [Medical Record](#).<sup>[36]</sup>
-  : Allows access to the [Settings](#).<sup>[54]</sup> area for the account.
-  : Allows access to the [Help Center](#).<sup>[53]</sup>

## 5.1 Message Center

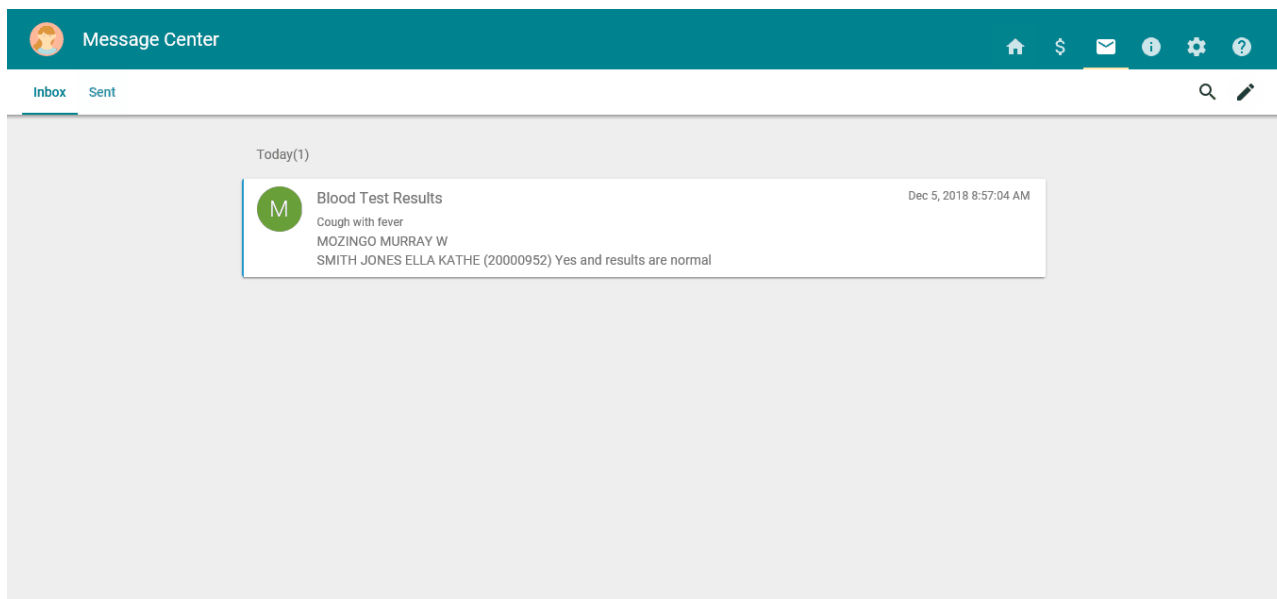
The message center will allow patients and authorized representatives to view messages that have been sent in regards to a visit from one of the providers they saw while at the facility. It will also allow the patient or authorized representative to send a message directly to the provider.

To access the Message Center, select **Message Center** from the Dashboard.

### Viewing Messages

Once Message Center has been selected, the patient or authorized representative's messages will display in their Inbox. These messages will only display if a provider has sent a message in regards to a patient's account. The messages that have not been read yet will display the subject in bold lettering. To display the message from the provider, select the message.

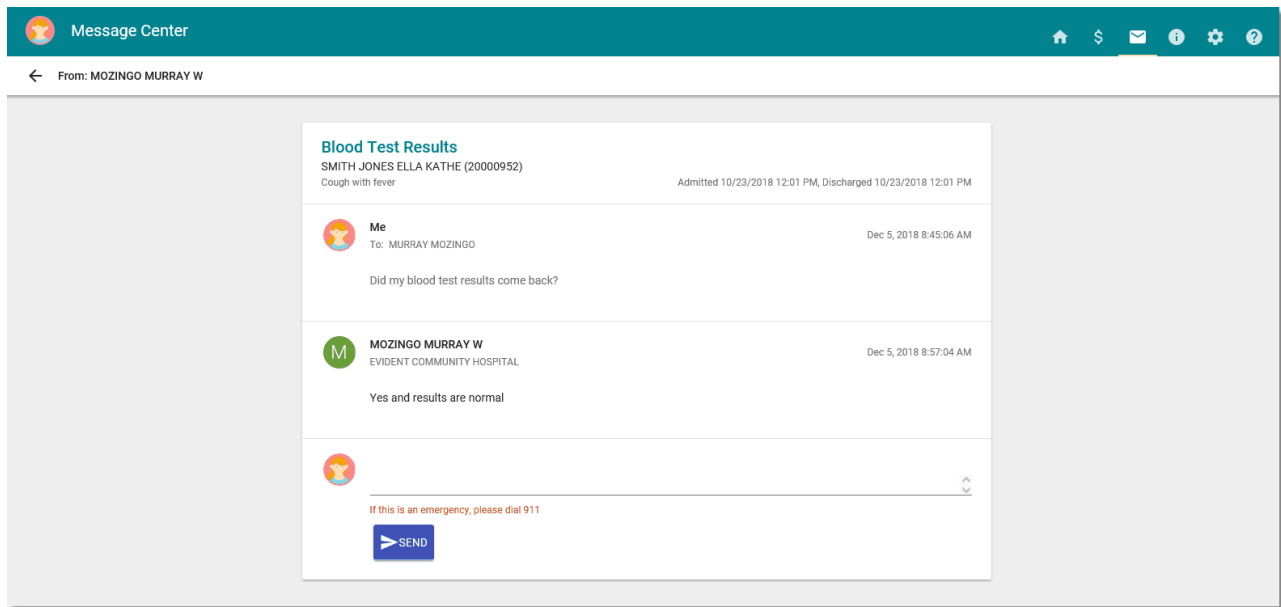
Select **Thrive Patient Portal > Login > Message Center**



Patient Portal - Message Center

If the provider has sent several messages in regards to the selected account, they will all be displayed on the screen starting with the oldest message first.

Select **Thrive Patient Portal > Login > Message Center > Message**



Patient Portal - Message Center


**NOTE:** Once the patient or authorized representative has viewed the message, the message will turn grey in the Inbox screen.



## Sending Messages

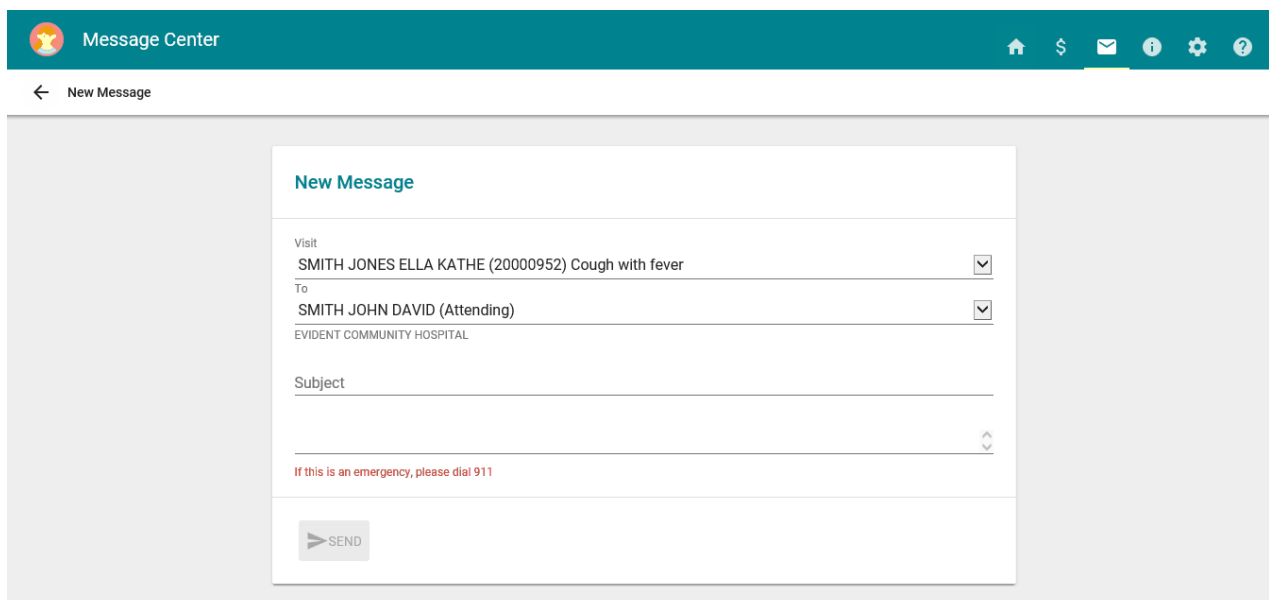
If the patient is wanting to reply to the message, he/she will place the cursor in the reply section at the bottom of the screen.

Once the message is typed in the space provided, select **Send** at the bottom of the screen to send the message.

For the patient to initiate a message to the provider, select the  pencil icon on the Inbox screen in the Message Center.

The **Visit** field will have a drop-down of visits the signed in patient or Authorized Representative has access to. Select a visit the message is in regards to. The **To** field will have a drop-down of providers who saw the patient during their visit from which to choose. If there is only one provider that the patient saw, that will be the only one listed. Type in a subject, message and then select **Send**.

Select **Thrive Patient Portal > Login > Message Center > \_Message > Pencil Icon**



The screenshot shows the 'Message Center' interface. At the top is a teal header with a star icon, the text 'Message Center', and navigation icons (home, dollar sign, envelope, info, settings, help). Below the header is a white bar with a back arrow and the text 'New Message'. The main content area is a light gray box containing a white form titled 'New Message'. The form has the following fields: 'Visit' with a dropdown menu showing 'SMITH JONES ELLA KATHE (20000952) Cough with fever'; 'To' with a dropdown menu showing 'SMITH JOHN DAVID (Attending)' and 'EVIDENT COMMUNITY HOSPITAL'; and 'Subject' with a text input field. Below the subject field is a red warning message: 'If this is an emergency, please dial 911'. At the bottom of the form is a gray button with a right arrow and the text 'SEND'.

Patient Portal - Message Center

**NOTE:** To view sent messages, select the **Sent** option from the Message Center.

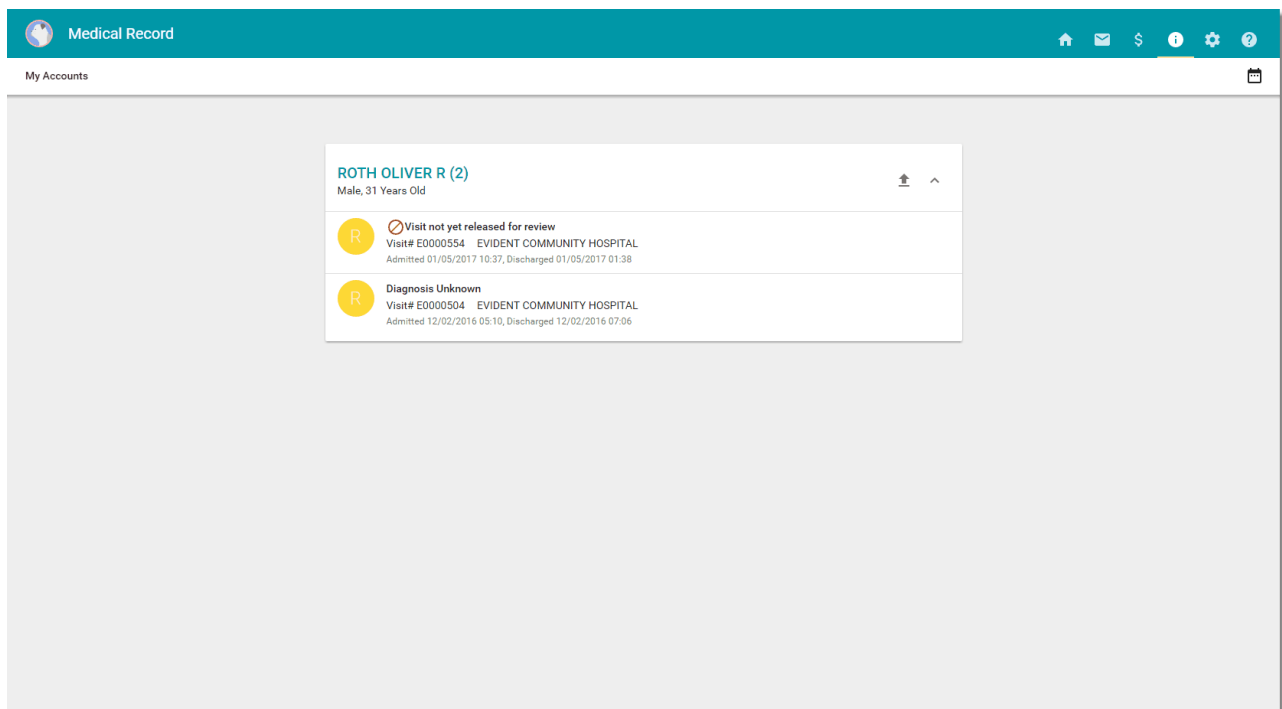
## 5.2 Medical Record

The Medical Record option will allow patients to see their Patient Summary for any of their visits to the facility. To view the Patient Summary, the patient will first need to select **Medical Record**.

All of the names the patient is authorized to view will be listed, along with visits they are authorized to view. The patient may then select the visit that he/she would like to view.

**NOTE:** Accounts must be discharged in order for them to show in the Patient Portal, unless the Patient Portal was launched from within Thrive. If the Patient Portal was launched from within Thrive, the patient or authorized representative can also see the account that the portal is launched from, even if it has not been discharged.

Select **Thrive Patient Portal > Login > Medical Records**



Medical Records - My Accounts

The Patient Summary may be viewed by selecting the appropriate visit. See [Selecting a Visit](#)<sup>38</sup> for additional information.

Documents may also be upload to the portal if the facility has purchased the Information Submissions application. See [Upload Documents](#)<sup>41</sup> for additional information.

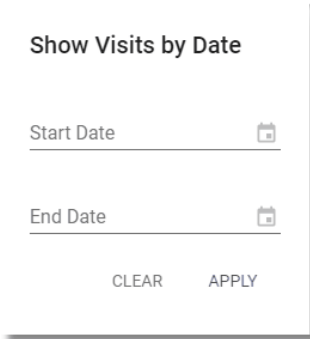
The Visit within the Medical Record may also be searched by a selecting a specific date range from

the calender picker  in the top right hand corner of the Medical Record Screen.

To search for Visits by a specific date range:

1. Select the **Calendar Picker**.
2. Select the **Start Date** and choose the date from the calendar.
3. Select the **End Date** and choose the date from the calendar.
4. Select **Apply** to filter the visit to only display within the selected date range. Choosing **Clear** will clear out the selected start and end dates.

Select **Thrive Patient Portal > Login > Medical Records > Calendar Picker**



The screenshot shows a web form titled "Show Visits by Date". It contains two input fields: "Start Date" and "End Date", each with a calendar icon to its right. Below these fields are two buttons: "CLEAR" and "APPLY". The form is part of a larger interface, with the text "Medical Records - Visits by Date" visible at the bottom of the form's container.

Medical Records - Visits by Date

## Selecting a Visit

From the Medical Record screen select the Visit from beneath the patient name to view the visit information.

Select **Thrive Patient Portal > Login > Medical Records > Visit**

The screenshot displays the 'Medical Record' interface for a patient named Reed Grace Ellen. The header shows the patient's name and ID (30001180). The main content area is divided into several sections:

- Patient Information:** Reed Grace Ellen, Female, 33 years old at time of visit. Born Feb 9, 1983. Address: 6600 WALL ST, MOBILE AL 36695. Email: ellie@email.com, Phone: (251) 639-8200. Language: English. Ethnicity: Not Hispanic or Latino. Race: WHITE.
- Admission/Discharge:** Admitted 05/19/2016 03:31, Discharged 05/19/2016 04:20. Location: Emergency Room. Chief Complaint: STOMACH PAIN. Notes: Never chewed tobacco, Never smoker.
- Facility Information:** EVIDENT COMMUNITY HOSPITAL, 2758 WALL ST, MOBILE AL 36695, (517) 437-4451.
- Discharge Summary:** You were admitted to Evident Community Hospital on 05/19/2016 15:31. You were discharged from Evident Community Hospital on 05/19/2016 16:20. Should you have any questions prior to discharge, please contact a member of your healthcare team. If you have left the hospital.
- Care Team (1):** Baxter James MD, 1234 Medical Drive Mobile AL 36608, (251) 510-9987, Attending Physician.

At the bottom of the patient information section, there is a link: [Transmit, download or print Summary of Care document](#).

### Medical Record - Visit

The following **Demographic Information** will be available of each account of the Medical Record:

- Patient's Name, Gender, Age at time of visit.
- Other/Previous Name (if applicable), Birth date, Address of patient
- Patient's Race, Ethnicity and Preferred language.
- Patient's Email Address, Home Phone number and Cell Phone number

The following **Visit Information** will be available for each account:

- Date the patient was Admitted, Date the patient was Discharged, Visit Type, Chief Complaint, Smoking Status and Smokeless Tobacco Status.
- Facility Name, Facility Address, Facility Contact Name and the Facility Phone Number.

To Transmit, Download or print the Summary of Care Document, Referral Note or Discharge

Summary see [Downloading a CCDA Document](#)<sup>[44]</sup> to retain a copy of one of the CCDA documents, or [Transmitting a CCDA Document](#)<sup>[48]</sup> to send to a personal email or the patient's provider for more information.

The following sections are available if charted within the patient's visit at facility:

- **Discharge Summary** section will display the patient's Admit date/time to the facility, the Discharge date/time from the facility, lab test performed and the following message: Should you have any questions prior to discharge, please contact a member of your healthcare team. If you have left the hospital and have any questions, please contact your primary care physician.
- **Care Team** section will also display the patient's care member name(s) and their role at the facility.
- **Care Plan** section will display the patient assessment/plan of the visit, any hospital orders placed during the clinic visit and any active plan of care goal descriptions associated with the visit. The author's name will display if it is documented for the plan of care goal. The assessment portion will display any documentation made within an Assessment Type section of a Documentation Document for EDIS and Thrive Provider EHR visits. The Assessment portion for an inpatient visit will display the last signed progress note from the Physician Documentation application. The Plan portion will display any documentation made within a Plan Type section of a Documentation Document for EDIS and Thrive Provider EHR visits. The Plan portion for an inpatient visit will display any documentation documented within a flowchart section marked as "Plan". Hospital orders that have been placed on a clinic visit will also display with the Plan portion of the Care Plan.
- **Test Results** section will display each individual test performed at the facility with the corresponding result. The Lab location name, address, and phone number of the lab that performed the test will display below the lab name. If a specimen source is indicated, it will display within the section along with any information regarding the condition and disposition of the specimens that do not meet the labs criteria for acceptability.
- **Health Concern** section will display the Health Concerns entered within the Health History application. The description of the concern, any associated problems, the description of any other concerns added and the author of the concern will display. The Author will also include the other option description if utilized within the patient's Health Concern.
- **Implanted Devices** section will display the number of of active Implantable devices within the patient's medical record. It will also display each individual Implanted Device description, UDI number, brand name, version/model, manufacturer, procedure description if one is associated, procedure date, DI and device type.
- **Immunizations** section will display the name of the immunization, date the immunization was given, status of Complete if immunization was given or status of Canceled if immunization was not given, lot number, manufacture name and refusal reason (if applicable).
- **Procedures** section will display all procedures entered within the Surgical/Procedural section on the Health History application and procedures added within the Grouper.
- **Allergies** section will display the allergy name, reaction, severity and onset date. If there is not an onset date entered for the allergy, the date the allergy was added to the account will display.

- **Medications** section will display medications that are active (medications ordered during visit) and prescribed (medications patient is currently taking at home).
- **Problems** section will display the problem description, start date, resolved date and problem status.

**NOTE:** Problems will only pull to the Patient Portal if they are active, unless the resolved problem has been mark as a Health Concern. The start date will display the date from the diagnosis date field. If this date is blank, the date that the problem was entered on the patient profile will display. A problem that is entered on the selected visit will only display for the current visit. It will not display on visits discharged prior to the start date of the problem.

- **Vitals** section will display the following vital sign values along with their units documented within the patient visit: height, weight, BP, Heart Rate, O2 Saturation, Body Temperature, Respiratory Rate and FIO2.

**NOTE:** Metric Units will display for Height, Weight and Temperature for facilities located outside of the United States.

- **Appointments** section will display any future scheduled appointments within Updated Scheduling for the patient profile or any outbound referrals documented within Referral/Transition of Care area of the Communications application. The appointment location, name of provider and appointment date for appointments made within the Updated Scheduling application. The appointments documented within the Referral/Transition of Care will display the Outbound Provider and appointment date. Once an appointment date has passed the current date the appointment will no longer display. Appointments will display in chronological order.
- **Decision Aids** section will display the description of any Patient Education Documents on the patient's account.
- **My Documents** section will display Radiology Transcriptions, Patient Education Documents, Infobutton Documents, Medical Records Transcriptions, Scanned Images and Lab Results. Selecting the Download icon will allow the patient to view the selected document.

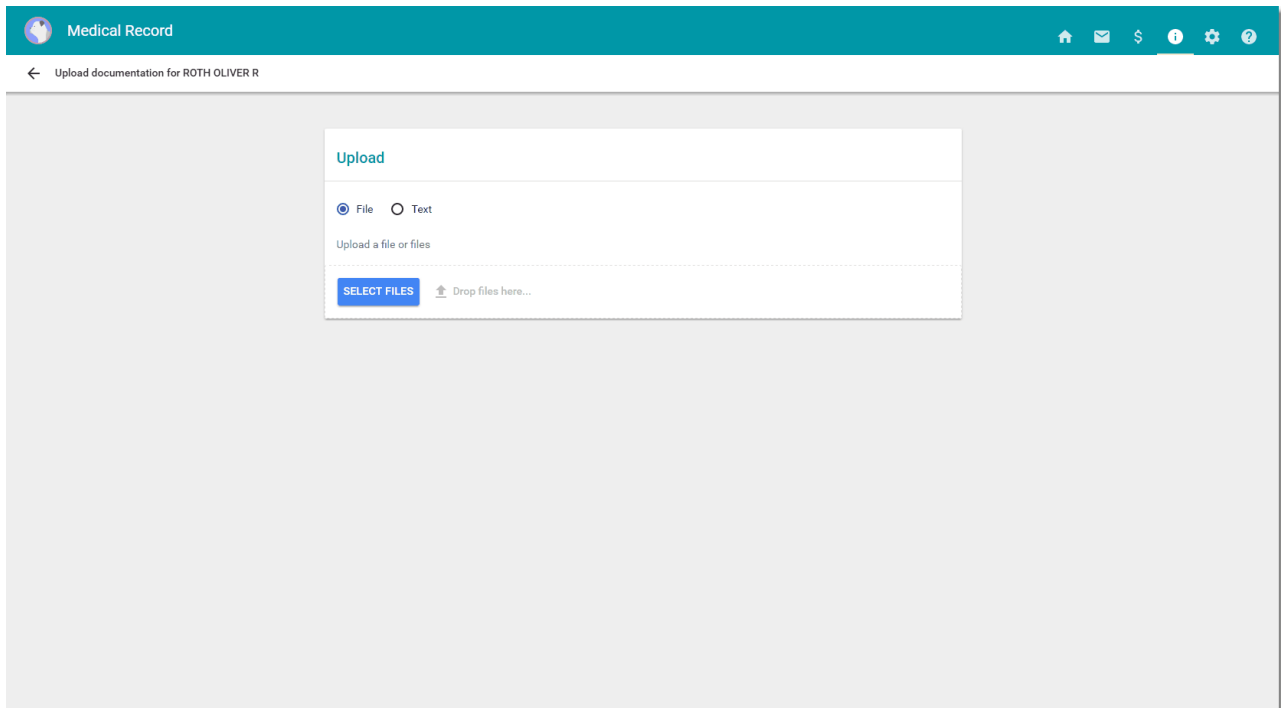
**NOTE:** For Radiology Transcriptions, the following transcriptions will display: orders not requiring esign, signed transcriptions and cosigned transcriptions.

## Upload Documents

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

To upload a document from the Medical Records screen, select **Upload Documents** .

Select **Thrive Patient Portal > Login > Medical Records > Upload Documents**



Medical Record - Upload Documents

Documents may be uploaded by selecting File or Text.

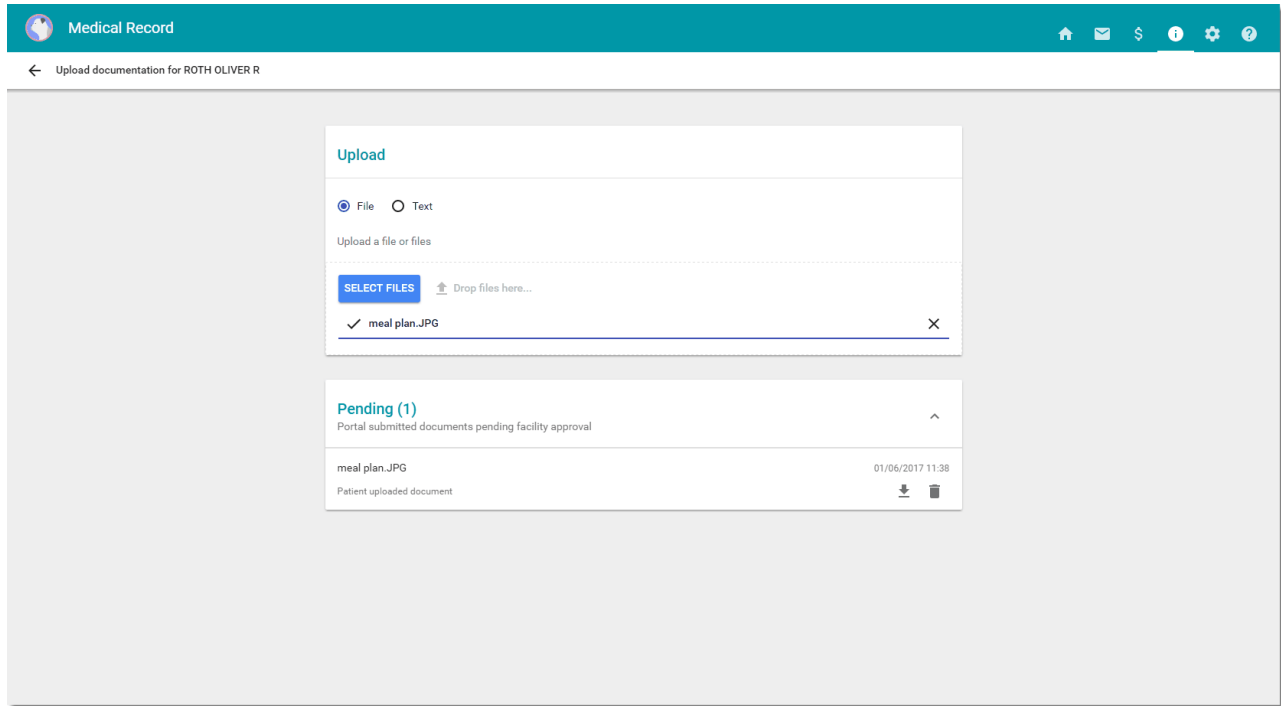
File allows the patient or authorized representative to browse their PC and pull in a document. Text allows the patient or authorized representative to free text information as a document.

To upload a file from the patient's or authorized representative's PC:

1. Select **File**.
2. Select **Select Files** to browse.
3. Choose the files that will be uploaded and select **Open**.


**NOTE:** The file should not exceed 5MB and the following file types may be used: AVI, BMP, CCR, CDA, CSD, CSV, ZIP, DOC, EXE, GIF, JPEG, JPG, PDF, PNG, RTF, TIFF, TXT, WMV, XLS, CSD2, XLSX and DOCX.


Select **Medical Records > Upload Documents > File > Select Files > Select File to Upload > Open**



**Medical Record - Uploaded Documents**

Once a document has loaded, it will display as "Pending (1) Portal submitted documents pending facility approval" with the date and time of the upload.

The patient or authorized representative may select the document title or select **Download**  to view the uploaded document.

If the patient or authorized representative uploaded the wrong document, **Delete**  may be selected to remove the document as long as it has not been associated with a visit within Thrive. If the document is deleted, the document will not be available within Thrive to be associated with a visit.

Once a document has been deleted, a **Restore**  option becomes available in the case the document was deleted by accident.







See [Importing Information Submissions](#) <sup>65</sup> for additional information on importing documents within Thrive.

After the uploaded document has been associated with a visit, the document will now display within that visit under My Documents.




Select **Medical Records > Visit**



Medical Record



← ROTH OLIVER R (E0000504)




Temperature (F)	38.6
1 Measurement	
Pulse (beats/min)	63
1 Measurement	
Respiration (breaths/min)	17
1 Measurement	
O2 Saturation (%)	100
1 Measurement	

My Documents (4)

Patient Progress Notes

12/03/2016


Nursing Station Clinical History



Initial Interview

12/03/2016


Nursing Station Clinical History



Initial Physical Assess

12/03/2016


Nursing Station Clinical History



Information Submission

12/02/2016 07:11

Patient uploaded document



## Medical Records - Visit

### Downloading a CCD A Document

Downloading one of the documents will allow the patient to retain a copy for their records.

To begin the process of downloading a copy of one of the following documents, select the document from the account:

- **Transmit, download or print Summary of Care document**
- **Transmit, download or print Referral Note**
- **Transmit, download or print Discharge Summary**

Select **Thrive Patient Portal > Login > Medical Records > Account**

The screenshot displays the 'Medical Record' section of the Thrive Patient Portal for a patient named REED GRACE ELLEN. The page is organized into several sections:

- Patient Information:** REED GRACE ELLEN, Female, 33 years old at time of visit.
- Demographics:** Born Feb 9, 1983; 6600 WALL ST, MOBILE AL 36695; English; Not Hispanic or Latino; WHITE.
- Contact Information:** ellie@email.com; (251) 639-8200.
- Medical History:** Admitted 05/19/2016 03:31, Discharged 05/19/2016 04:20; Emergency Room; STOMACH PAIN; Never chewed tobacco; Never smoker.
- Location:** EVIDENT COMMUNITY HOSPITAL, 2758 WALL ST, MOBILE AL 36695, (517) 437-4451.
- Actions:** A red circle highlights the link 'Transmit, download or print Summary of Care document'.
- Discharge Summary:** You were admitted to Evident Community Hospital on 05/19/2016 15:31; You were discharged from Evident Community Hospital on 05/19/2016 16:20; Should you have any questions prior to discharge, please contact a member of your healthcare team. If you have left the hospital.
- Care Team (1):** Baxter James MD, 1234 Medical Drive Mobile AL 36608, (251) 510-9987, Attending Physician.

**Patient Portal - Download Summary of Care**

The selected document will then display on the screen.

Select **Thrive Patient Portal > Login > Medical Records > Account > Transmit, download or print Summary of Care document**

**Patient Summary (HL7 CCD)**

Document Effective: 05/24/2016 11:27

Encounter Dates: 05/19/2016 through 05/19/2016

**Contents**

- Patient Demographics
- Care Team
- Provider Organization
- Vital Signs
- Allergies
- Procedures
- History of Immunizations
- Problems
- Results
- Active Medications
- Medications Administered During Visit
- Encounters
- Social History
- Patient Decision Aids
- Discharge Instructions
- Chief Complaint and Reason For Visit
- Function Status
- Plan of Care
- Referral/Transition of Care

**Patient Demographics** [\[back to top\]](#)

<b>Name</b>	GRACE ELLEN REED
<b>Address</b>	6600 WALL ST MOBILE, AL 36695
<b>Primary Home</b>	2516398200
<b>Date of Birth</b>	02/09/1983

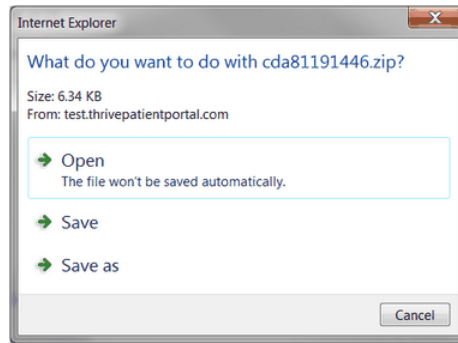
**Patient Portal - Download Summary of Care**



Select the **Download** option at the top of the screen to save copy of the document.

A box will display and ask if the document needs to be opened or saved.

Select **Thrive Patient Portal > Login > Medical Records > Account > Transmit, download or print Summary of Care document > Download**



Patient Portal - Download Summary of Care

After the action has been selected, the document will be saved as an HTML Document.

Select **Thrive Patient Portal > Login > Medical Records > Account > Transmit, download or print Summary of Care document > Download**

Name	Type	Compressed size	Password p...	Size	Ratio	Date modified
cda5129147	HTML Document	3 KB	No	12 KB	82%	5/24/2016 11:20 AM
cda645914669.dgst	DGST File	1 KB	No	1 KB	0%	5/24/2016 11:20 AM
cda690914665.dgst	DGST File	1 KB	No	1 KB	0%	5/24/2016 11:20 AM
cda766914863	XML Document	4 KB	No	20 KB	83%	5/24/2016 11:20 AM

Patient Portal - Download Summary of Care

The document will display once selected.

Select Thrive Patient Portal > Login > Medical Records > Account > Transmit, download or print Summary of Care document > Download > HTML Document

## Patient Summary (HL7 CCD)

Document Effective: 05/24/2016 11:31

Encounter Dates: 05/19/2016 through 05/19/2016

### Contents

- [Patient Demographics](#)
- [Care Team](#)
- [Provider Organization](#)
- [Vital Signs](#)
- [Allergies](#)
- [Procedures](#)
- [History of Immunizations](#)
- [Problems](#)
- [Results](#)
- [Active Medications](#)
- [Medications Administered During Visit](#)
- [Encounters](#)
- [Social History](#)
- [Patient Decision Aids](#)
- [Discharge Instructions](#)
- [Chief Complaint and Reason For Visit](#)
- [Function Status](#)
- [Plan of Care](#)
- [Referral/Transition of Care](#)

### Patient Demographics

[\[back to top\]](#)

Name	GRACE ELLEN REED
Address	6600 WALL ST MOBILE, AL 36695
Primary Home	2516398200
Date of Birth	02/09/1983
Sex	F
Race	WHITE
Ethnicity	Not Hispanic or Latino

Patient Portal - Download Summary of Care

### ***Transmitting a CCDA Document***

Transmitting one of the documents allows the patient to send a copy of the document in an email format to the patient's provider, or to a personal email address.

To begin the process of downloading a copy of one of the following documents, select the document from the account:

- **Transmit, download or print Summary of Care document**
- **Transmit, download or print Referral Note**
- **Transmit, download or print Discharge Summary**

Select **Thrive Patient Portal > Login > Medical Records > Account**

The screenshot displays the 'Medical Record' section of the Thrive Patient Portal for a patient named REED GRACE ELLEN. The page is organized into several sections:

- Patient Information:** REED GRACE ELLEN, Female, 33 years old at time of visit.
- Demographics:** Born Feb 9, 1983, 6600 WALL ST, MOBILE AL 36695. Contact: ellie@email.com, (251) 639-8200.
- Language/Ethnicity:** English, Not Hispanic or Latino, WHITE.
- Medical History:** Admitted 05/19/2016 03:31, Discharged 05/19/2016 04:20. Emergency Room, STOMACH PAIN. Never chewed tobacco, Never smoker.
- Location:** EVIDENT COMMUNITY HOSPITAL, 2758 WALL ST, MOBILE AL 36695, (517) 437-4451.
- Actions:** A red circle highlights the link 'Transmit, download or print Summary of Care document'.
- Discharge Summary:** You were admitted to Evident Community Hospital on 05/19/2016 15:31. You were discharged from Evident Community Hospital on 05/19/2016 16:20. Should you have any questions prior to discharge, please contact a member of your healthcare team. If you have left the hospital.
- Care Team (1):** Baxter James MD, 1234 Medical Drive Mobile AL 36608, (251) 510-9987, Attending Physician.

**Patient Portal - Transmit Summary of Care**



Then select the **Transmit** option at the top of the screen.

Select **Thrive Patient Portal > Login > Medical Records > Account > Select a CDDA Document**

**Medical Record**

X REED GRACE ELLEN (30001180)

**Patient Summary (HL7 CCD)**

Document Effective: 05/24/2016 11:27

Encounter Dates: 05/19/2016 through 05/19/2016

**Contents**

- Patient Demographics
- Care Team
- Provider Organization
- Vital Signs
- Allergies
- Procedures
- History of Immunizations
- Problems
- Results
- Active Medications
- Medications Administered During Visit
- Encounters
- Social History
- Patient Decision Aids
- Discharge Instructions
- Chief Complaint and Reason For Visit
- Function Status
- Plan of Care
- Referral/Transition of Care

**Patient Demographics** [\[back to top\]](#)

<b>Name</b>	GRACE ELLEN REED
<b>Address</b>	6600 WALL ST MOBILE, AL 36695
<b>Primary Home</b>	2516398200
<b>Date of Birth</b>	02/09/1983

**Patient Portal - Transmit Summary of Care**

The transmission agreement will display to be read and **Agree** will need to be selected at the beginning or the end of the agreement.

Select **Thrive Patient Portal > Login > Medical Records > Account > Select a CDDA Document > Transmit**

**Medical Record**

← REED GRACE ELLEN (30001180)

### Transmittal Agreement

☒ AGREE

**Terms of Use**

Computer Programs and Systems, Inc. ("CPSI") owns and operates this patient portal (the .Patient Portal.). The Patient Portal is made available to Eligible Portal Users, as defined herein, under the following terms and conditions (the .Terms of Use.).

**Patient Portal:** This Patient Portal is an Internet service offered by CPSI to patients of participating healthcare providers who have licensed the Patient Portal from CPSI (each a .Participating Provider. and collectively the .Participating Providers.). The Patient Portal provides a means by which patients may securely access select portions of their medical record and communicate with a Participating Provider. Each Participating Provider will provide the credentials needed to access information maintained by that specific Participating Provider. Credentials provided by one Participating Provider will not provide access to information maintained by any other Participating Provider.

The Patient Portal is the intellectual property of CPSI and no part of the Patient Portal may be reproduced without first obtaining CPSI's written permission. The information and services provided on or through Patient Portal may be updated or removed at any time without notice.

**Eligible Portal Users:** An Eligible Portal User shall be defined as a user that i) agrees to these Terms of Use without modification; ii) is 18 years of age or older; iii) has a current email address; and iv) has received Patient Portal access credentials from a Participating Provider. By using the Patient Portal, you represent and warrant that you are an Eligible Portal User. Subject to these Terms of Use, CPSI hereby grants to Eligible Portal Users a non-exclusive, non-transferable, royalty-free right to access and use the Patient Portal.

**Use of the Patient Portal:** Use of the Patient Portal by an Eligible Portal User is contingent upon the user's agreement to i) use the Patient Portal solely as permitted by these Terms of Use; ii) use the Patient Portal only to communicate on behalf of yourself or someone else for whom you are legally authorized; iii) only enter information that is accurate to the greatest extent of your knowledge; iv) not impersonate or attempt to impersonate someone else; v) not use the Patient Portal to defame, abuse, harass, stalk, threaten, damage the reputation of or otherwise infringe on the legal rights of others; vi) not use the Patient Portal in any way that would infringe on the intellectual property rights of CPSI or any third party; vii) not use the Patient Portal in any way that would violate the privacy of any third party; viii) not use the Patient Portal to disseminate any information that, in CPSI's sole discretion, is inappropriate, profane, defamatory, infringing, obscene, offensive, indecent, or illegal; ix) not intentionally post inaccurate, false or misleading information; x) not use the Patient Portal in any way that is unlawful; xi) not use the Patient Portal in any way that would adversely affect the availability or efficiency of the Patient Portal or interfere with any other Eligible Portal User's ability to access and use the Patient Portal; xii) not attempt to defeat or evade any security or access control of the Patient Portal; xiii) protect the security of and not share with any third party any user name, login and password information used to access the Patient Portal; and xiv) not to allow any third party acting on your behalf to act in any manner not allowed by these Terms of Use.

**Assumption of Risk:** By using the Patient Portal, you are assuming certain risks that include (but are not limited to) i) your personal health information may be disclosed to unauthorized individuals if your password is stolen, you share your password or you leave a computer logged

#### Patient Portal - Transmit Summary of Care



The patient has the option to send to their doctor via a direct message address or to their personal email.

### To Send To My Doctor:

1. Select the radio button **To My Doctor**.
2. Enter the direct message address and re-enter to confirm it.
3. A subject and message may be entered as well, but is not necessary.
4. Select the check box for **I agree to Terms of Use**.
5. After all the information is entered, select **Transmit** to send the direct message with the Patient Summary attached.

Select **Thrive Patient Portal > Login > Medical Records > Account > Select a CDDA Document > Transmit**

Medical Record

← ROTH OLIVER MICHAEL (E0000449)

**Transmit**

☒ To My Doctor ☐ To Personal Email

To Address  
cpslin@hintest.hin.us

Confirm To Address  
cpslin@hintest.hin.us

Subject  
CDA ROTH OLIVER MICHAEL

Filename  
CDA\_E0000449

Message  
Dr. Jones  
Here is a copy of my Patient Summary from recent trip to the hospital. Thanks  
Oliver Roth

☒ I agree to Terms of Use  
as of Thu Aug 10 2017 07:52:56 GMT-0500 (Central Daylight Time)

✓ TRANSMIT X CANCEL

**Transmit To My Doctor**

**To Send To Personal Email:**

1. Select the radio button for **To Personal Email**. The following disclaimer will display in red: "Transmission via email cannot be guaranteed to be transmitted over secure networks."
2. Enter the personal email address and re-enter to confirm it.
3. A subject and message may be entered as well but is not necessary.
4. Select the check box for **I understand and accept the risks involved with transmitting private health information via email**.
5. Then select the check box for **I agree to Terms of Use** to enable the Transmit option. Both check boxes must be selected in order to transmit the selected CCDA document.
6. After all the information is entered, select **Transmit** to send the direct message with the Patient Summary attached.

Select **Thrive Patient Portal > Login > Medical Records > Account > Transmit**, download or print **Summary of Care document > Transmit > Agree**

Medical Record

← ROTH OLIVER MICHAEL (E0000449)

**Transmit**

☐ To My Doctor ☒ To Personal Email

Transmission via email cannot be guaranteed to be transmitted over secure networks.

To Address  
oliverroth@evident.com

Confirm To Address  
oliverroth@evident.com

Subject  
CDA ROTH OLIVER MICHAEL

Filename  
CDA\_E0000449

Message

☒ I understand and accept the risks involved with transmitting private health information via email.

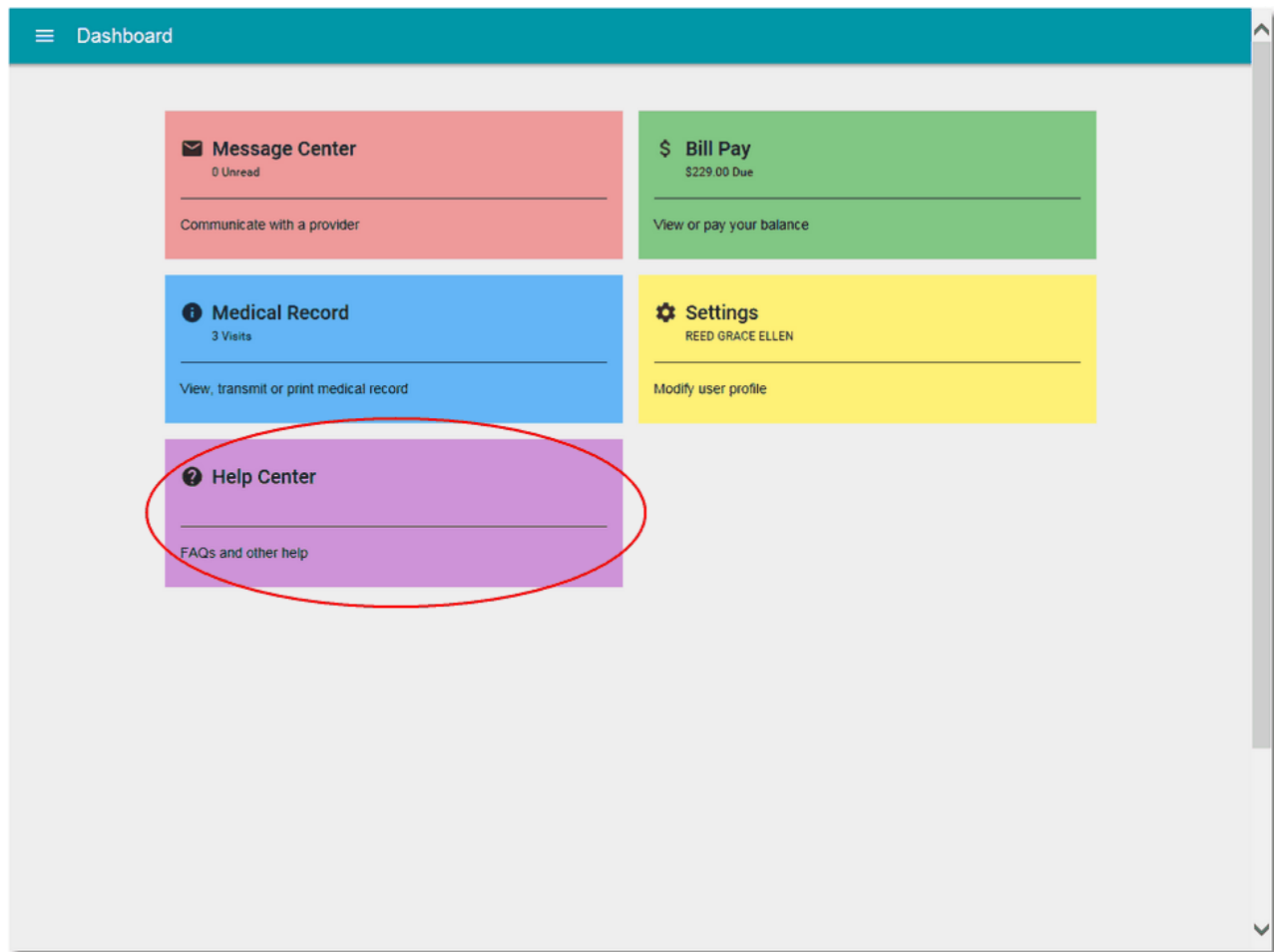
☒ I agree to Terms of Use  
as of Thu Aug 10 2017 07:52:56 GMT-0500 (Central Daylight Time)

**Transmit To My Personal Email**

## 5.3 Help Center

The Help Center will display Frequently Asked Questions. These will help answer common questions the patient may have about different areas of the portal.

Select **Thrive Patient Portal** > **Login**



Patient Portal - Dashboard

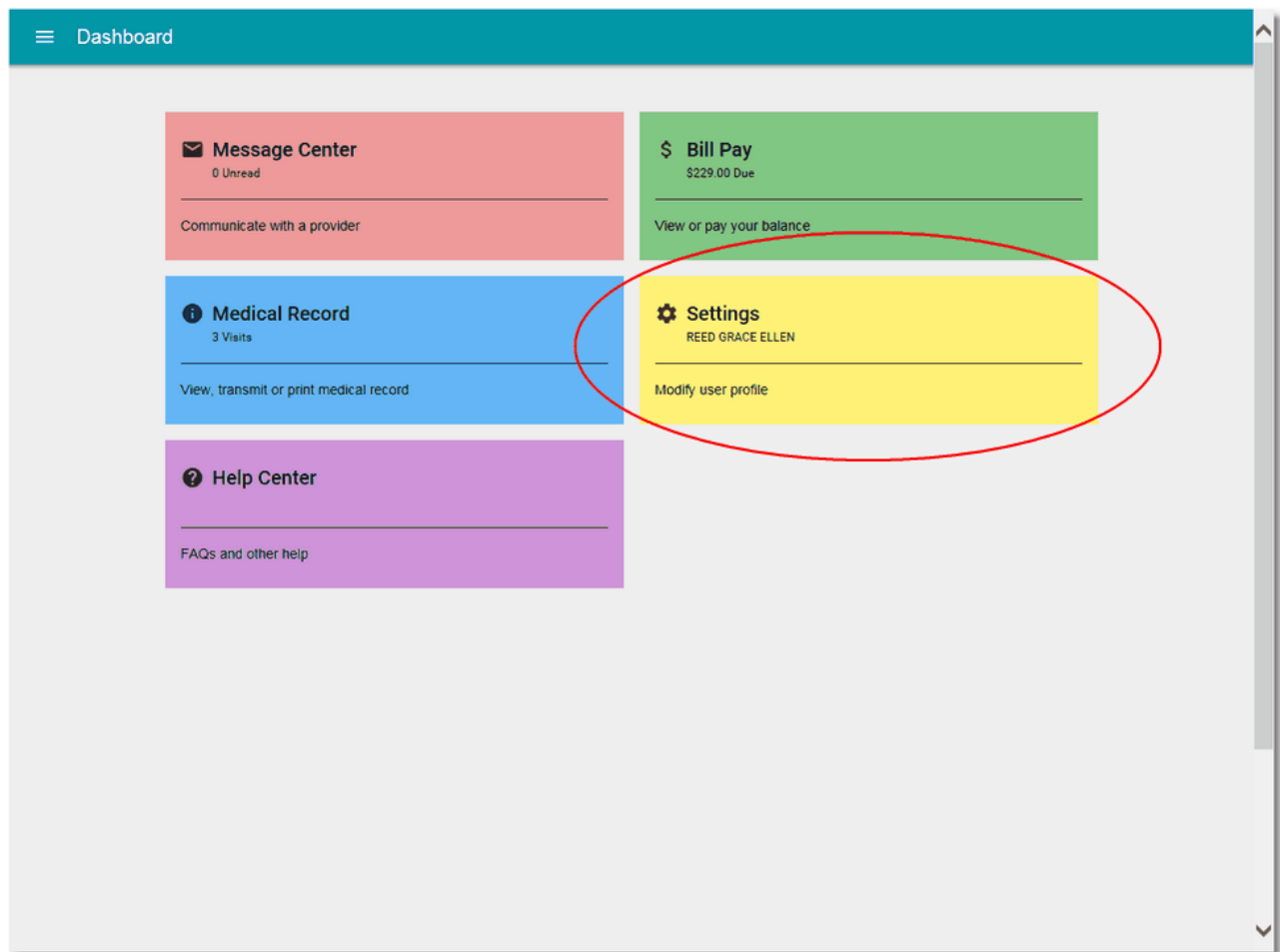
## 5.4 Bill Pay

For more information on how to use the Bill Pay option, please contact a TruBridge representative.

## 5.5 Settings

The Settings option will assist the patient with using the entire Patient Portal.

Select **Patient Portal Account** > **Login**



Patient Portal - Dashboard

## Profile

The Profile section will allow the patient to update their Email, Phone Number and select a different Avatar, if needed. If any changes are made, select **Update**.

Select **Patient Portal Account > Dashboard > Settings**

The screenshot shows the 'Settings' page in a patient portal. The top navigation bar is teal with a hamburger menu icon, the text 'Settings', a home icon, and an upward arrow. Below this is a sub-navigation bar with 'Profile', 'Security', and 'Activity' tabs, where 'Profile' is selected. The main content area is a white card with a light gray border. At the top of the card, the name 'REED GRACE ELLEN' is displayed in teal, followed by 'Female, 33 Years Old' in gray. Below this are two input fields: 'Email' and 'Phone Number', each with a horizontal line. Under the 'Phone Number' field is an 'Avatar' section. It features a horizontal row of 15 circular icons with various colors and styles. The third icon from the left is highlighted with a blue square border. Below this row is a single circular icon. At the bottom right of the card are two buttons: a gray 'CANCEL' button and a blue 'UPDATE' button.

Patient Portal - Settings - Profile

## Security

Security is where patients can go to change their password and/or security questions for the portal. If any of the information is changed on this page, select **Update Password** or **Update Security Questions** at the bottom of the applicable section.

Select **Patient Portal Account > Dashboard > Settings > Security**

The screenshot shows the 'Settings' page of the Thrive Patient Portal, specifically the 'Security' tab. The page has a teal header with a menu icon and the word 'Settings'. Below the header, there are three tabs: 'Profile', 'Security' (which is active and highlighted in blue), and 'Activity'. The main content area is divided into two sections. The first section is titled 'Password' and contains three input fields: 'Old Password', 'New Password', and 'Confirm New Password'. To the right of these fields, there is a list of password criteria: 'Passwords should match the following criteria: \* Must be at least 8 characters, \* Must contain one uppercase letter, \* Must contain one lowercase letter, \* Must contain one number, \* Must contain one special character'. Below the input fields is a button labeled 'UPDATE PASSWORD' with a checkmark icon. The second section is titled 'Security Questions' and contains a prompt: 'Please select/answer 3 security questions.' Below this, there are two questions. 'Security Question 1:' has a dropdown menu with the text 'Please select one of the following security questions' and a checkmark icon. Below the dropdown is an input field for 'Answer 1:'. 'Security Question 2:' also has a dropdown menu with the same text and a checkmark icon, followed by an input field for the answer. The page has a light gray background and a white content area.

Patient Portal - Settings - Security

## **Activity**

The Activity screen is broken into the three areas for logging patient activity within the Patient Portal: the Action, Application and Activity log. Please see below for more information on each area.

### **Actions**

The Actions section will display the nine actions that were performed by the patient along with the total number for each action within the patient portal. Selecting an individual action will also sort the Activity Log to only display activities with the selected action. The nine actions are:

- **API** will display the number of requests for patient information from a third party application.
- **Download** will display the number of documents downloaded from the CCDA documents or the "My Documents" section of the patient's visit.
- **Login** will display the number of logins to the Patient Portal.
- **OAuth** will display the number of authorized accesses to patient information within the Patient Portal.
- **Print** will display the number of times any CCDA document was printed.
- **Send** will display the number of secure messages sent to the patient's provider.
- **Transmit** will display the number of times a CCDA Document was emailed.
- **Upload** will display the number of times an image or document was uploaded to the Patient Portal.
- **View** will display the number of times a patient's Medical Record screen or CCDA document was accessed.

### **Applications**

The Applications section will display all third party applications that have, or had, access to the patient's information. Thrive Patient Portal will always display as active. Any third party applications listed that have an active status will have a blue hyperlink labeled "Revoke", which if selected will allow the patient to deny access to the third party. This will force a new request of the patient when they access the internet or 3rd party website. Selecting an individual application will also sort the Activity Log to only display activities using the selected application.

### **Activity Log**

The Activity log will display every action performed by the patient or Authorized Representative. It will display the following information:

- **Date and time** will display the action performed within the Patient Portal.
- **Name** will display the name of the patient that was selected within the Medical Record.

- **Visit** will display the visit number chosen.
- **Profile ID** will display the profile ID of the user logged into the Patient Portal.
- **Description** will display where or what was selected within the Patient Portal.
- **Action** will display the action performed.
- **Performer** will display the patient's name associated to the Login that performed of the action.
- **Application** will display application that was used to perform the action.
- **Transmit To** will display the email that the CCDA was transmitted to.

**NOTE:** Each column may be sorted by selecting the column header.



The **Magnifying Glass** icon allows the activity log to be searched by one of the following: date/time, performer, description and transmit to columns. Select the magnifying glass and enter the appropriate search parameters.



The **Settings** icon allows the patient to select what displays within the Patient Portal Activity Log. The patient may uncheck any check box to make the column no longer display.



## Select Patient Portal Account &gt; Dashboard &gt; Settings &gt; Activity

The screenshot displays the 'Settings' page with the 'Activity' tab selected. The page is divided into three main sections: 'Actions', 'Applications', and 'Activity Log'.

**Actions**

Action	Count
Download	2
Login	7
OAuth	6
View	15

4 Items

**Applications**

Application	Status
Thrive Patient Portal	

1 Items

**Activity Log**

5 Items per page < 2 of 6 >

Date	Name	Visit ID	Profile ID	Description	Action	Performer
8/9/2017 6:28:28 AM	ROTH OLIVER MICHAEL	E0000449	4916	Clinical Information	View	ROTH OLIVER MICHAEL
8/9/2017 6:28:23 AM	ROTH OLIVER MICHAEL	E0000449	4916	Clinical Information	View	ROTH OLIVER MICHAEL
8/9/2017 6:28:02 AM	ROTH OLIVER MICHAEL		4916	Token Granted	OAuth	ROTH OLIVER MICHAEL
8/9/2017 6:27:56 AM	ROTH OLIVER MICHAEL	E0000449	4916	Clinical Information	View	ROTH OLIVER MICHAEL
8/9/2017 6:27:50 AM	ROTH OLIVER MICHAEL			10.17.1.37	Login	ROTH OLIVER MICHAEL

30 Items < 2 of 6 >



## Chapter 6 Exclusions

### 6.1 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**

ROTH OLIVER MICHAEL MR#: 357818 ACCOUNT#: 357818 DOB: 06/28/1985 Sex: Male Current Weight: 220 lbs 99.79 kg 99790.2 g  
AGE: 34Y CrCl: N/A Height: 71.00 inches BMI: 30.68 kg/m2 BSA: 2.24 m2 Admit Weight: 205 lbs 92.99 kg 92986.4 g  
RM: ER-4 Diagnosis: Fever Allergies: POLLEN, SESAME SEED, No Known Drug Aller...

Update

### Patient Consent/Privacy Settings

Consent/Privacy Notice: ☐ Date:

Med History Consent: ☐

The following selections will exclude data from selected user on Portal and Patient-facing APIs:

Patient: ☐

Authorized Representative: ☐

HIE Shared Data: ☐ Date:

Data Sensitivity Level:  Normal  Date:

Protect Immunization Data: ☐ Date:

Participate in CAHPS survey: ☐

Chronic Care Management Program: ☐ Participating ☐ Participation Declined ☒ Not Addressed Date:

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 Patient Portal.**

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

## 6.2 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**

Edit
Add
Remove
Default Checked
Default Unchecked
Delete

Converted API and Patient Portal Exclusions

Total: 1

Loaded Facility-Specific Preferences for 0001 EVIDENT COMMUNITY HOSPITAL

Reference Lab Patients

Default value is ☒

Filter Method:
☐ Show records that match ANY of the selected criteria
☒ Show records that match ALL of the selected criteria

Converted API and Patient Portal Exclusions

## 6.3 Exclusion 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.

## 6.4 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**

JOHNSON ELLEN E MR#: 000411 ACCOUNT#: 358168 DOB: 02/09/2003 Sex: Female Current Weight: 0.00 kg 0.0 g  
 AGE: 16Y CrCl: N/A Height: 0 inches BMI: 0 kg/m2 BSA: 0.00 m2 Admit Weight: 0.00 kg 0.0 g  
 RM: N/A Diagnosis: Pregnant - urine test confirms Allergies: No Known Drug Allergies

Save Refresh Release All

**Patient Medical Summaries - Exclusions Edit**

Type	Name	Date	CCDA	Portal/Api	Authorized Rep	Reason
Visit (1)	HIV	09/09/2019	X	X	X	
Care Team (2)	HCG URINE PREGNANCY T...	09/09/2019	X	X	X	

Type: Visit (1), Care Team (2), Image (2), Problem (1), Procedure (0), Result (2), Medical Record Transcription (2), Ancillary Transcription (0)

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 > Select Name**

JOHNSON ELLEN E MR#: 000411 ACCOUNT#: 358168 DOB: 02/09/2003 Sex: Female Current Weight: 0.00 kg 0.0 g  
 AGE: 16Y CrCl: N/A Height: 0 inches BMI: 0 kg/m2 BSA: 0.00 m2 Admit Weight: 0.00 kg 0.0 g  
 RM: N/A Diagnosis: Pregnant - urine test confirms Allergies: No Known Drug Allergies

Save Refresh Release All

Patient Medical Summaries - Exclusions Edit

Type	Name	Date	CCDA	Portal/Api	Authorized Rep	Reason
Visit (1)	HIV	09/09/2019		X	X	
Care Team (2)	HCG URINE PREGNANCY T...	09/09/2019		X	X	

EXCLUDE FROM  
☐ CCDA ☒ Portal/Api ☒ Authorized Rep

Exclusion Reason

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 Patient Portal and exclusions are released, those changes will not be reflected until the patient logs out and then back in.

## Chapter 7 Importing Information Submissions within Thrive

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.

### 7.1 Accessing 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](#)  screen.

#### **Document Queue**

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

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**

The screenshot displays the Thrive Patient Portal interface. On the left is a sidebar menu with options: Charts, ROTH OLIVER R (00004567), E-Sign, E-Scribe, System Menu, Reports, Scheduling, Tables, and System Administration. The main content area is titled 'Document Queue' and contains two sections: 'PATIENT DETAIL' and 'DOCUMENT LIST'. The 'PATIENT DETAIL' section lists patient information: First Name: OLIVER, Middle Name: R, Last Name: ROTH, Suffix: , Previous Name: , Date of Birth: 06/28/1985, Sex: M, Address 1: 604 OAK RIDGE CT W, Address 2: , City: DAPHNE, State: AL, Zip Code: 36526, Home: 1234567, Business: , and Mobile: . The 'DOCUMENT LIST' section shows a single document entry with the following details: Sent Date: 01/06/2017, Time: 11:38, Image Title: Patient Information Submission, and Visit: .

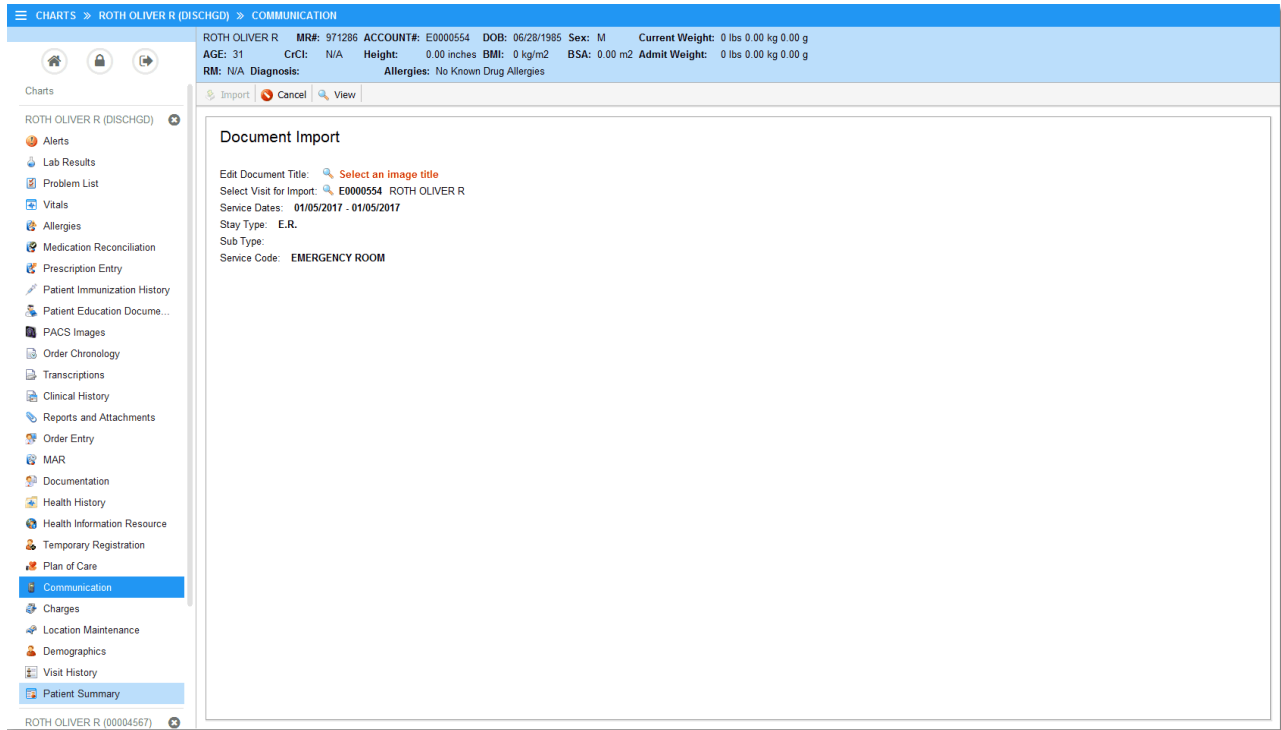
Information Submission - Document Queue

Documents available to import will display with the sent date and time that the patient or authorized representative uploaded the document via the Thrive Patient Portal 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**


CHARTS > ROTH OLIVER R (DISCHGD) > COMMUNICATION

ROTH OLIVER R MR#: 971286 ACCOUNT#: E0000554 DOB: 06/28/1985 Sex: M Current Weight: 0 lbs 0.00 kg 0.00 g  
 AGE: 31 CrCl: N/A Height: 0.00 inches BMI: 0 kg/m2 BSA: 0.00 m2 Admit Weight: 0 lbs 0.00 kg 0.00 g  
 RM: N/A Diagnosis: Allergies: No Known Drug Allergies


Charts


ROTH OLIVER R (DISCHGD)

- Alerts
- Lab Results
- Problem List
- Vitals
- Allergies
- Medication Reconciliation
- Prescription Entry
- Patient Immunization History
- Patient Education Document...
- PACS Images
- Order Chronology
- Transcriptions
- Clinical History
- Reports and Attachments
- Order Entry
- MAR
- Documentation
- Health History
- Health Information Resource
- Temporary Registration
- Plan of Care
- Communication**
- Charges
- Location Maintenance
- Demographics
- Visit History
- Patient Summary

Import Cancel View

**Document Import**

Edit Document Title:  [Select an image title](#)

Select Visit for Import:  E0000554 ROTH OLIVER R

Service Dates: 01/05/2017 - 01/05/2017

Stay Type: E.R.

Sub Type:

Service Code: EMERGENCY ROOM

ROTH OLIVER R (00004567)

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 > Select an Image Title**

CHARTS > ROTH OLIVER R (DISCHGD) > COMMUNICATION

ROTH OLIVER R MR#: 971286 ACCOUNT#: E0000554 DOB: 06/28/1985 Sex: M Current Weight: 0 lbs 0.00 kg 0.00 g  
 AGE: 31 CrCl: N/A Height: 0.00 inches BMI: 0 kg/m2 BSA: 0.00 m2 Admit Weight: 0 lbs 0.00 kg 0.00 g  
 RM: N/A Diagnosis: Allergies: No Known Drug Allergies

Charts

ROTH OLIVER R (DISCHGD)

- Alerts
- Lab Results
- Problem List
- Vitals
- Allergies
- Medication Reconciliation
- Prescription Entry
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- Health History
- Health Information Resource
- Temporary Registration
- Plan of Care
- Communication**
- Charges
- Location Maintenance
- Demographics
- Visit History
- Patient Summary

Image Titles

Search:

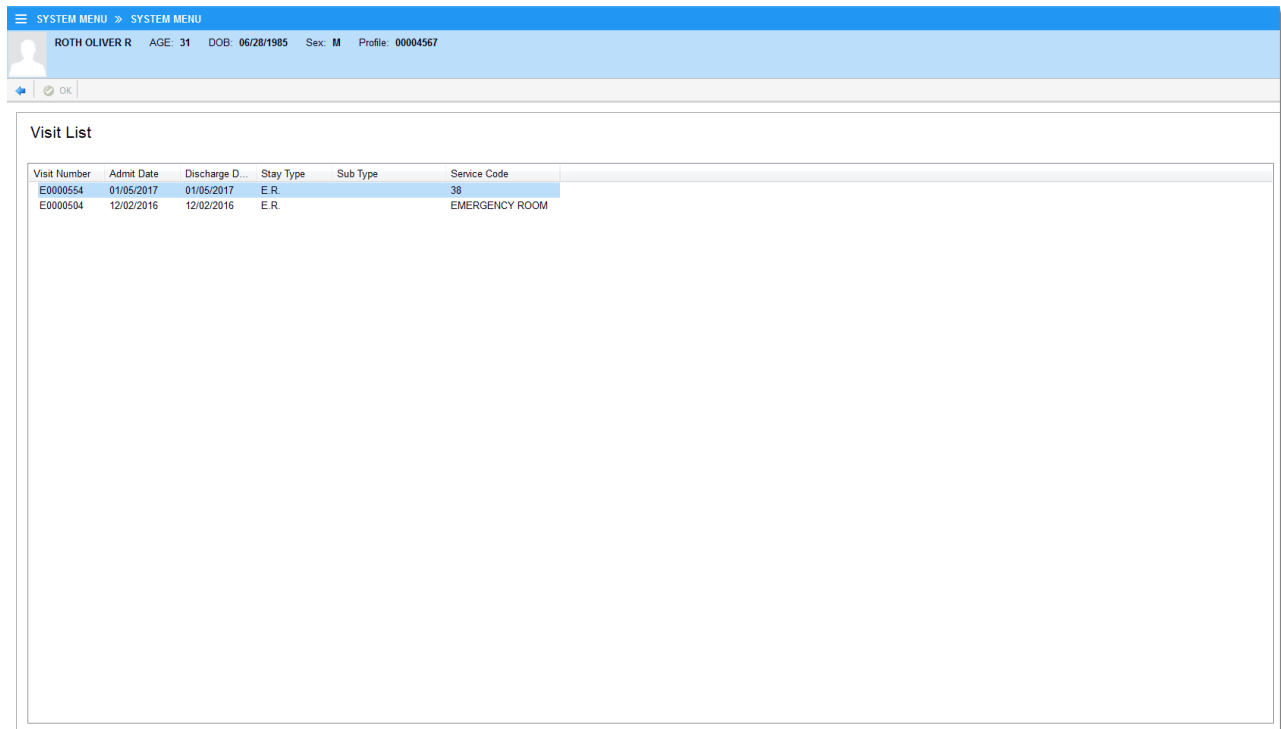
Title	Ac...	Health Information
ABN	Y	
Advanced Directives	Y	
ARTERIAL BLOOD GASES	Y	
CBC	Y	
Chartlink Photo	Y	
COMPLETE METABOLIC PROFILE	N	
Documentation Photos	Y	
DRIVERS LICENSE	Y	
EKG	Y	
ESIGN CONSULTATION	Y	
FACESHEET	Y	
History & Physical	Y	
INITIAL PHYSICAL ASSESSMENT	Y	
INSURANCE CARD	Y	
LABORATORY	Y	
LIVING WILL	Y	
MP-JEMR Patient Image	Y	
NEW ECHO	Y	
New Test image	N	
ORDER RESULTS	Y	
ORGAN DONOR	Y	
PAST MEDICAL HISTORY	Y	
PATIENT PHONE CONVERSATION	Y	
PATIENT PROGRESS NOTES	Y	
Physician Order	Y	
Physician's Order	Y	
PRE-ADMIT TESTING	Y	
SIGNED TERMS AGREEMENT	Y	
UPLOAD IMAGE	N	
UPLOADED IMAGE	N	
URINALYSIS	Y	
WOUND	Y	
WOUND PHOTOS	Y	

ROTH OLIVER R (00004567)

Information Submissions - Image Titles

- 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 > Select Visit for Import: Magnifying Glass**



SYSTEM MENU > SYSTEM MENU

ROTH OLIVER R AGE: 31 DOB: 06/28/1985 Sex: M Profile: 00004567

Visit List

Visit Number	Admit Date	Discharge D...	Stay Type	Sub Type	Service Code
E0000554	01/05/2017	01/05/2017	E.R.		38
E0000504	12/02/2016	12/02/2016	E.R.		EMERGENCY ROOM

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**

SYSTEM MENU > SYSTEM MENU

 ROTH OLIVER R   AGE: 31   DOB: 06/28/1985   Sex: M   Profile: 00004567

[View](#) | [View Document Queue - Match](#) | [Archive](#) | [Import](#) | [Restore](#) | [View History](#)

Document Queue

PATIENT DETAIL

First Name: OLIVER

Middle Name: R

Last Name: ROTH

Suffix:

Previous Name:

Date of Birth: 06/28/1985

Sex: M

Address 1: 604 OAK RIDGE CT W

Address 2:

City: DAPHNE

State: AL

Zip Code: 36526

Home: 1234567

Business:

Mobile:

DOCUMENT LIST

Sent Date: 01/06/2017   Time: 11:38

Image Title: Information Submission

Visit: E0000554

Document Queue

## Chapter 8 Print Reports

### 8.1 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 as 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.

## Patient Portal Access Report

06/01/2017 13:35		Evident Community Hospital Patient Portal Access Report Document was generated by the Thrive EHR Software 05/01/2017 - 06/01/2017			1 patient_portal_audit_log.template
Portal Login: 3276 05/16/2017 09:24:39	P/AR: P Action: View	Patient: MERRITT ADAM DELANE Data Accessed: Christy Gomez	Patient Visit ID: 359111	Attending Physician: 3115	
Portal Login: 3276 05/16/2017 09:24:43	P/AR: P Action: Reply	Patient: MERRITT ADAM DELANE Data Accessed: Christy Gomez	Patient Visit ID: 359111	Attending Physician: 3115	
Portal Login: 3276 05/16/2017 09:25:38	P/AR: P Action: View	Patient: MERRITT ADAM DELANE Data Accessed: Christy Gomez	Patient Visit ID: 359111	Attending Physician: 3115	
Portal Login: 3764 05/18/2017 17:58:04	P/AR: P Action: View	Patient: SMALL MATT MCKAY Data Accessed: Clinical Information	Patient Visit ID: 20001284	Attending Physician: 999999	
Portal Login: 3764 05/19/2017 07:58:26	P/AR: P Action: View	Patient: SMALL MATT MCKAY Data Accessed: Clinical Information	Patient Visit ID: 20001284	Attending Physician: 999999	
Portal Login: 4281 05/22/2017 11:36:37	P/AR: P Action: View	Patient: DARENSBOURG MARY BOWSE Data Accessed: Clinical Information	Patient Visit ID: 359138	Attending Physician: 1904	

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.

## 8.2 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 15:48		Evident Community Hospital Patient Portal Exclusion Report 05/20/2016 - 05/20/2016				mr_patient_portal_exclusion_log.template			1
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.



## 8.3 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

Run Report PDF Reset All Visits

Visits with Exclusions by Physician

EVIDENT COMMUNITY HOSPITAL Physician Number:  All Visits With Exclusions

Sort: Patient Name ☒ Ascending ☐ Descending

BEECH DAVIS SANDERS (357932)	Admitted: 12/15/2016	Discharged: 12/15/2016
JOHNSON ELLEN E (358168)	Admitted: 09/09/2019	Discharged: 09/09/2019
JOHNSON ROBERT LEVER (357856)	Admitted:	Discharged:
REED GRACE ELLEN (358002)	Admitted: 12/19/2016	Discharged: 12/19/2016
SMITH ELLA KATHERINE (357814)	Admitted: 05/16/2014	Discharged: 10/28/2016

Total number of visits with exclusions 5

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.