Evident ™

Thrive Patient Portal

Thrive Patient
Portal

Thrive Patient Portal

by Evident

PATIENT CENTERED.
COMMUNITY FOCUSED.

Evident™

Thrive Patient Portal

Copyright © 2021 by Evident.

Version   : 20

Published   : May 2021

Table of Contents

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 62, Exclusion Table 63, Chart

Level Exclusion [63] and Visits with Exclusions by Physician [75].

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 [21] and Access via Health Information Resource [25].

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 [38]

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 [57]

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 [38], Transmitting a CCDA Document [48], and Activity [57]

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 38, Downloading and Transmitting 44, and Activity 57.

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 7, Setting up a Patient Portal Account 15, Viewing Messages 33 and Sending Messages 35.

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 > <u>Select Patient</u>**
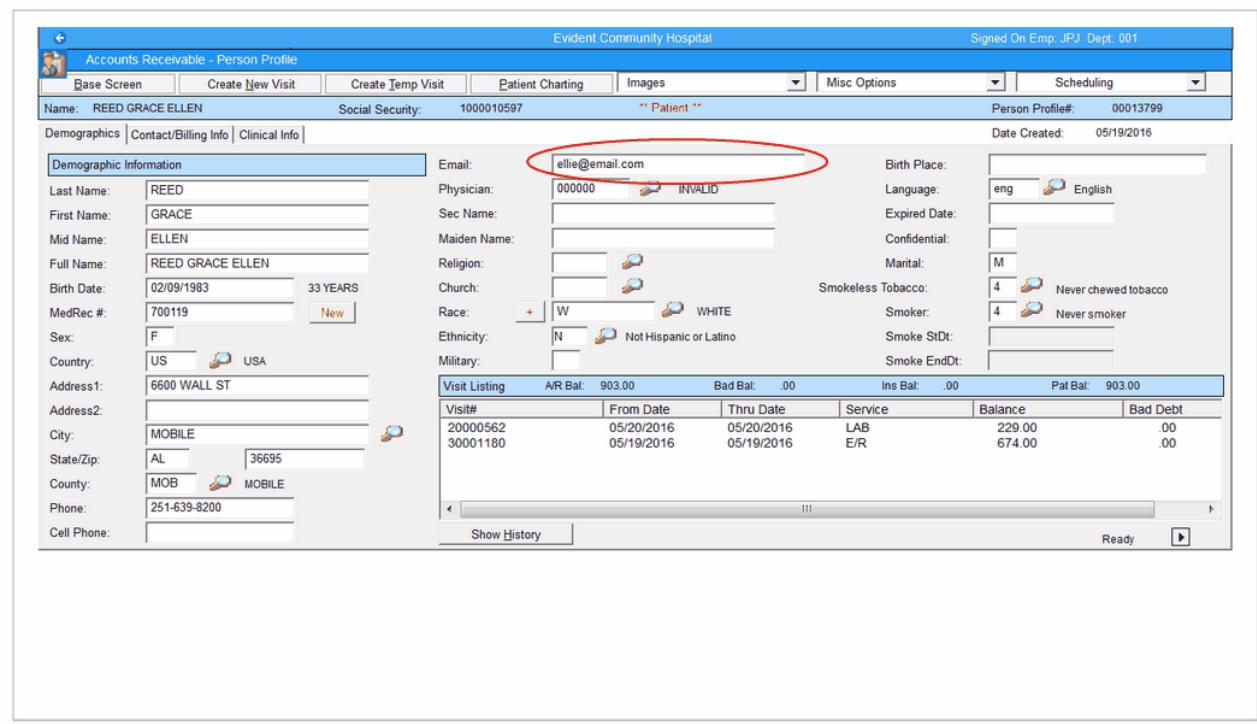
Accounts Receivable - Person Profile

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 > <u>Create New Visit</u>**

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**

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_**

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**

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 > <u>Portal Reset</u>**

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 it they were edited or submitted to a provider within the patient's chart.

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

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**

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 <u>Accessing an Existing Patient Portal Account</u> *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**
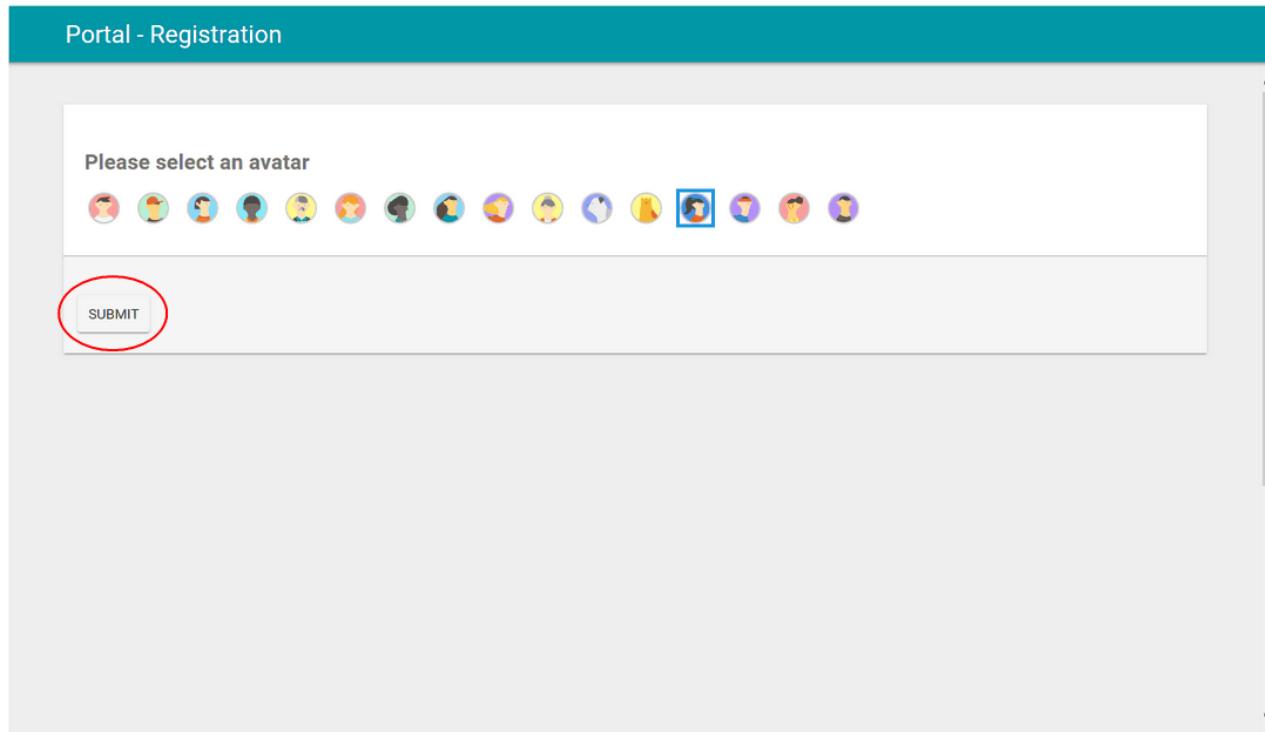
Portal Registration - Avatar Selection

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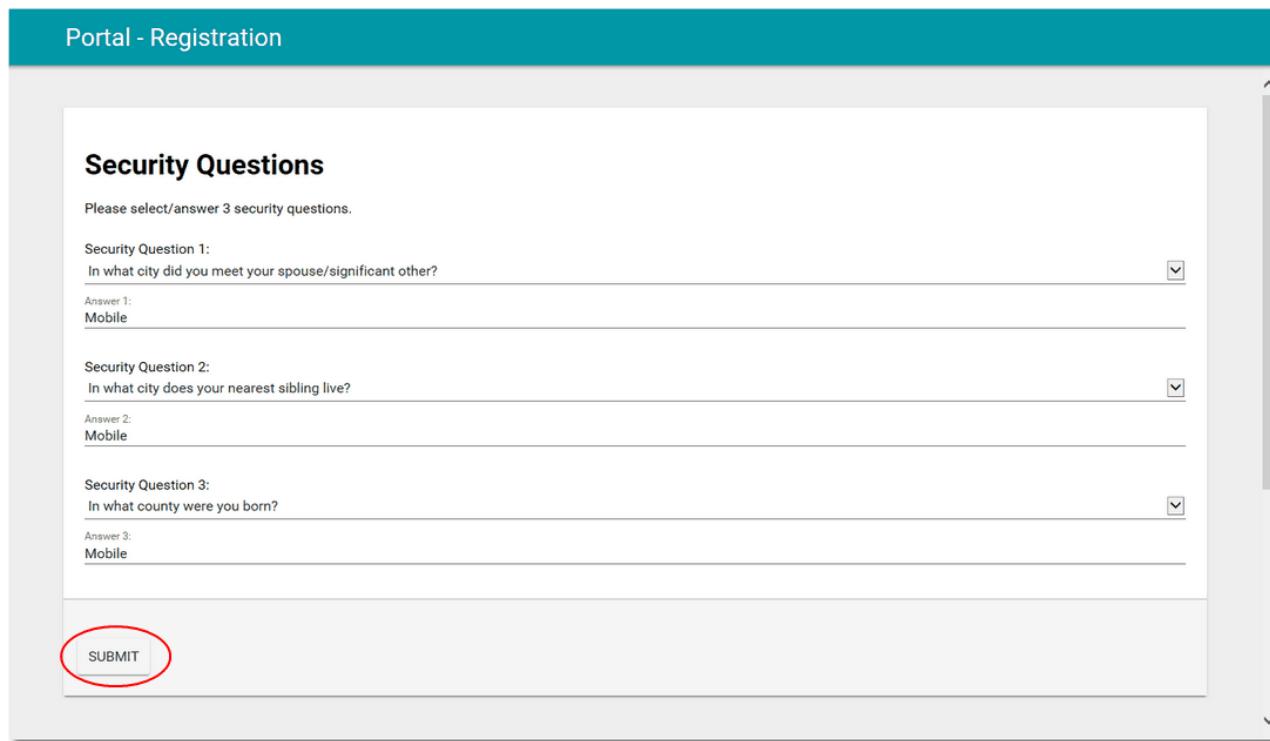
7. The patient is then taken to a Patient Portal confirmation screen. From this screen, the patient may select "**Please click here...**" to continue to the Patient Portal.

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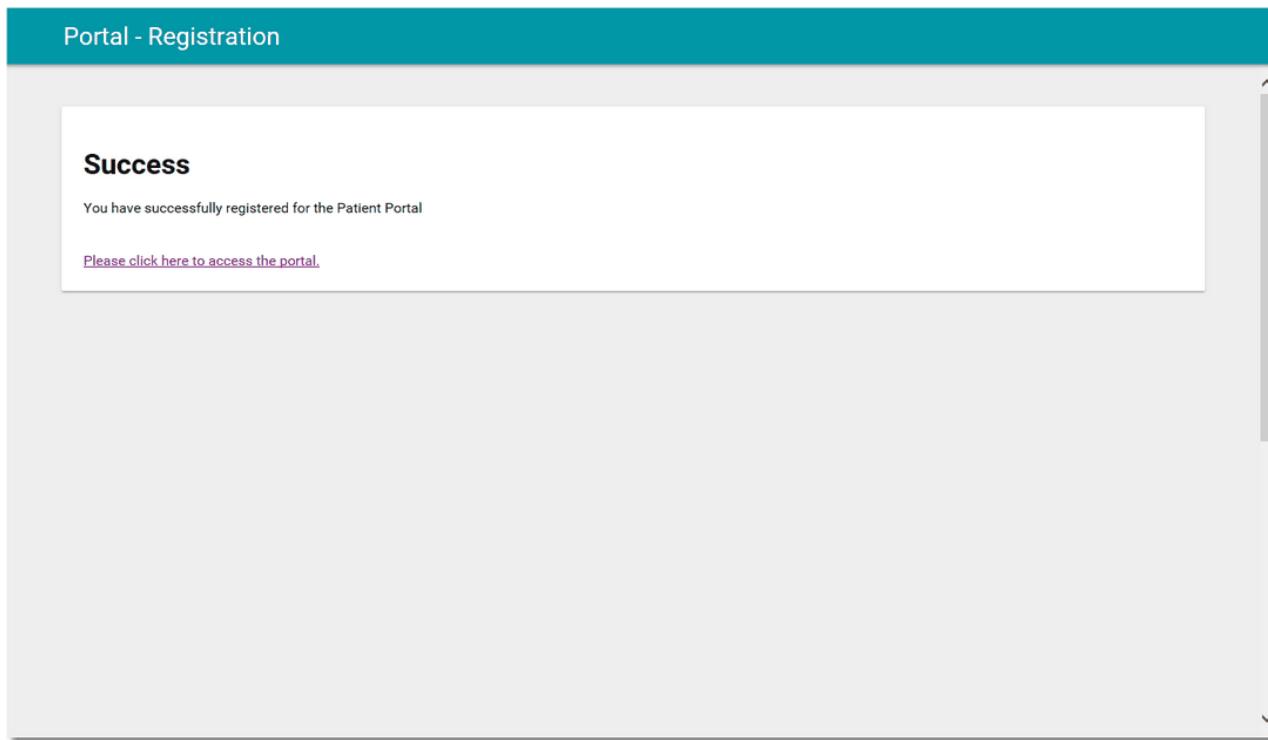
Portal Registration - Success Screen

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 > <u>Click here to access the portal</u>**

Patient Portal - Dashboard
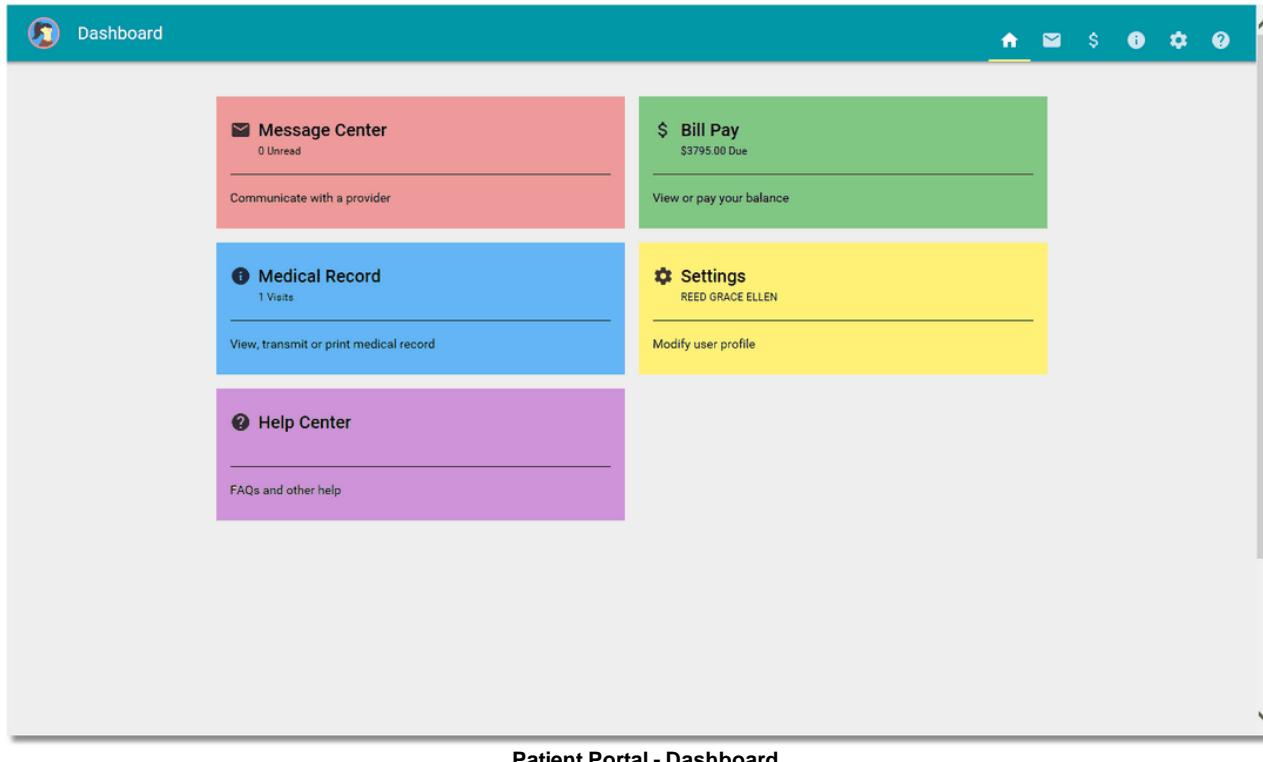
4.2   Access via Virtual Chart

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 > <u>Virtual Chart Tab</u>**

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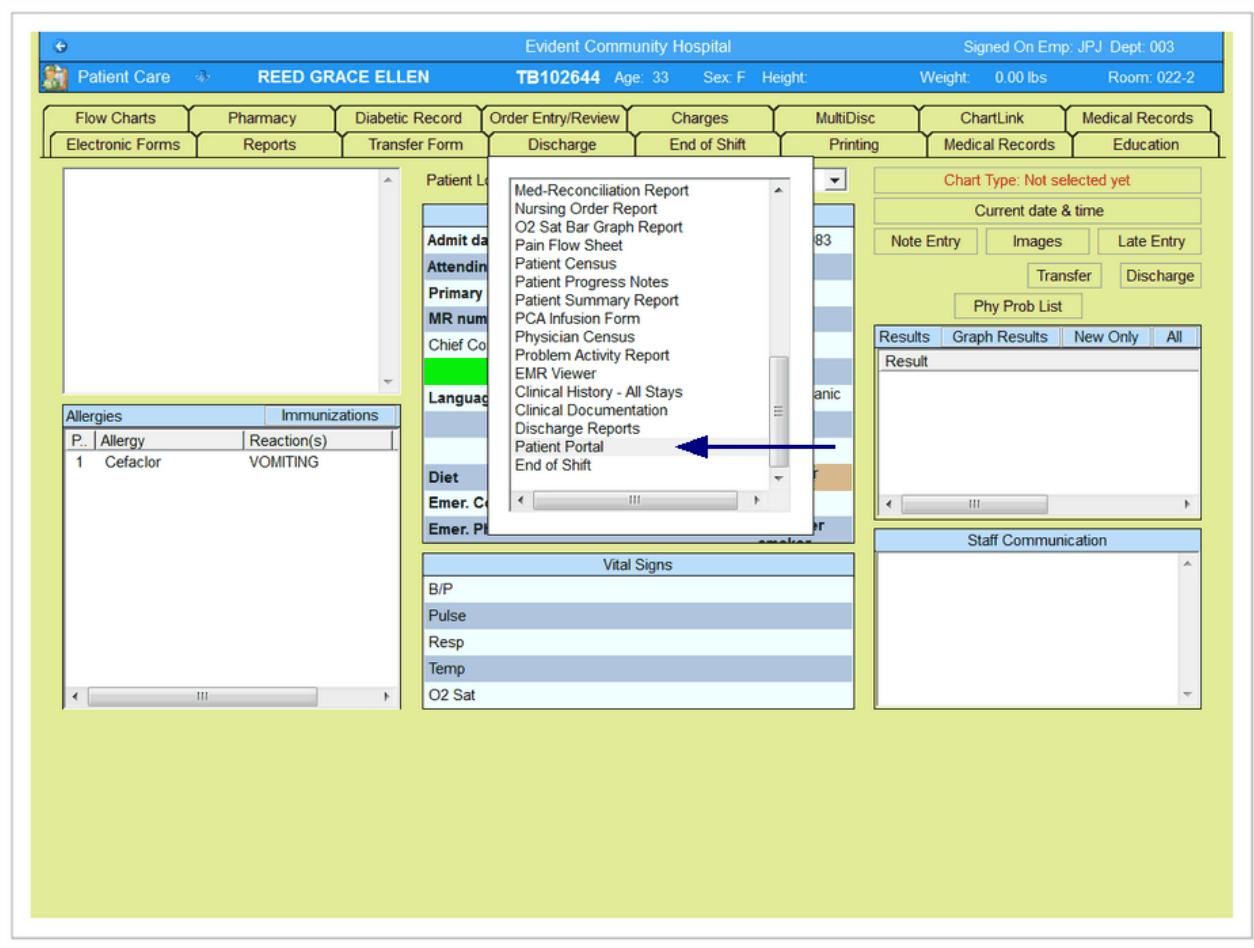
NOTE: *When accessing the Patient Portal through the Virtual Chart, an entry will be created in Release of Information for View, Download, Transmit Measure A.*

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] 27 *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** > <u>**Patient Account**</u>
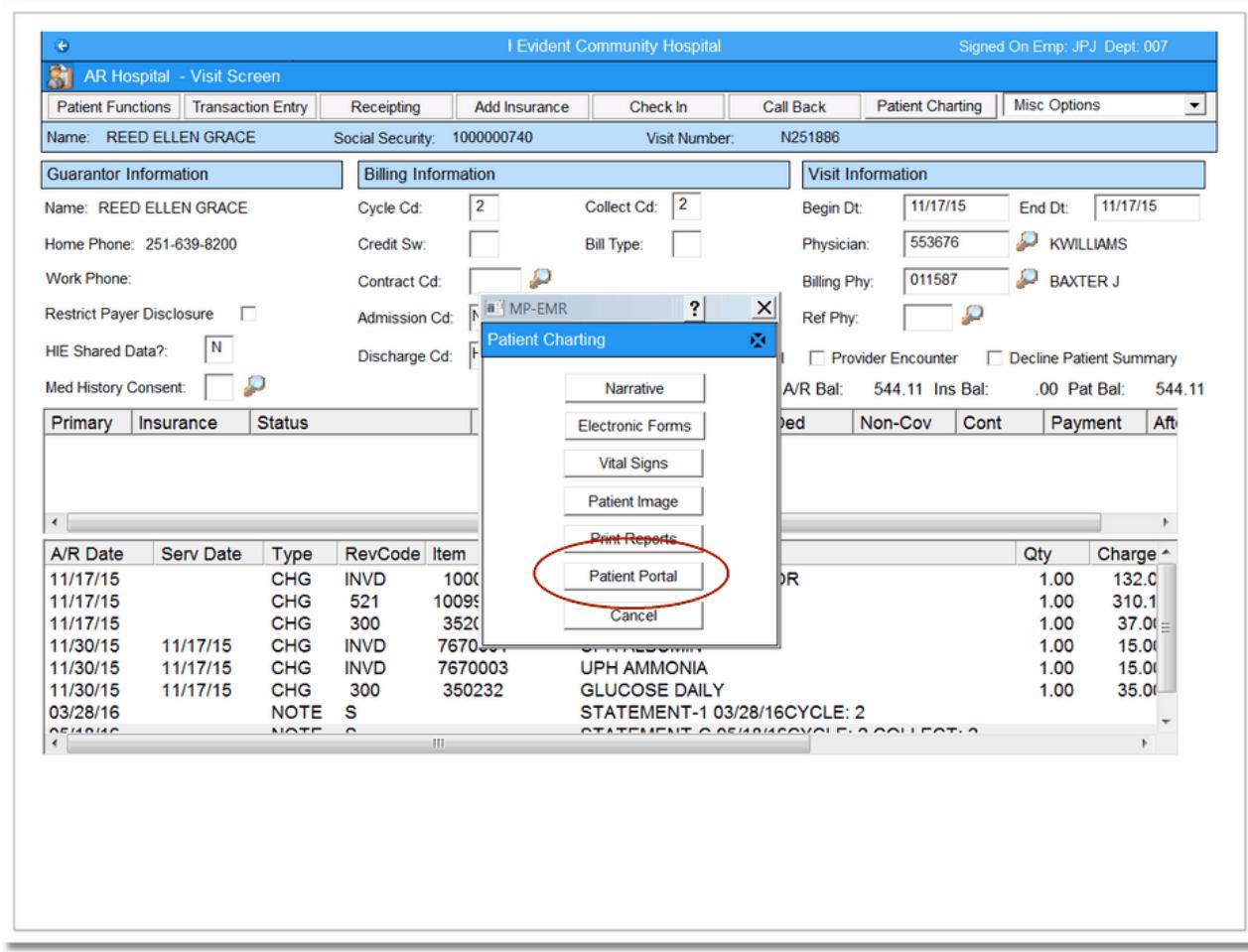
Patient Charting

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** 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** > <u>**Health Information Resource**</u>
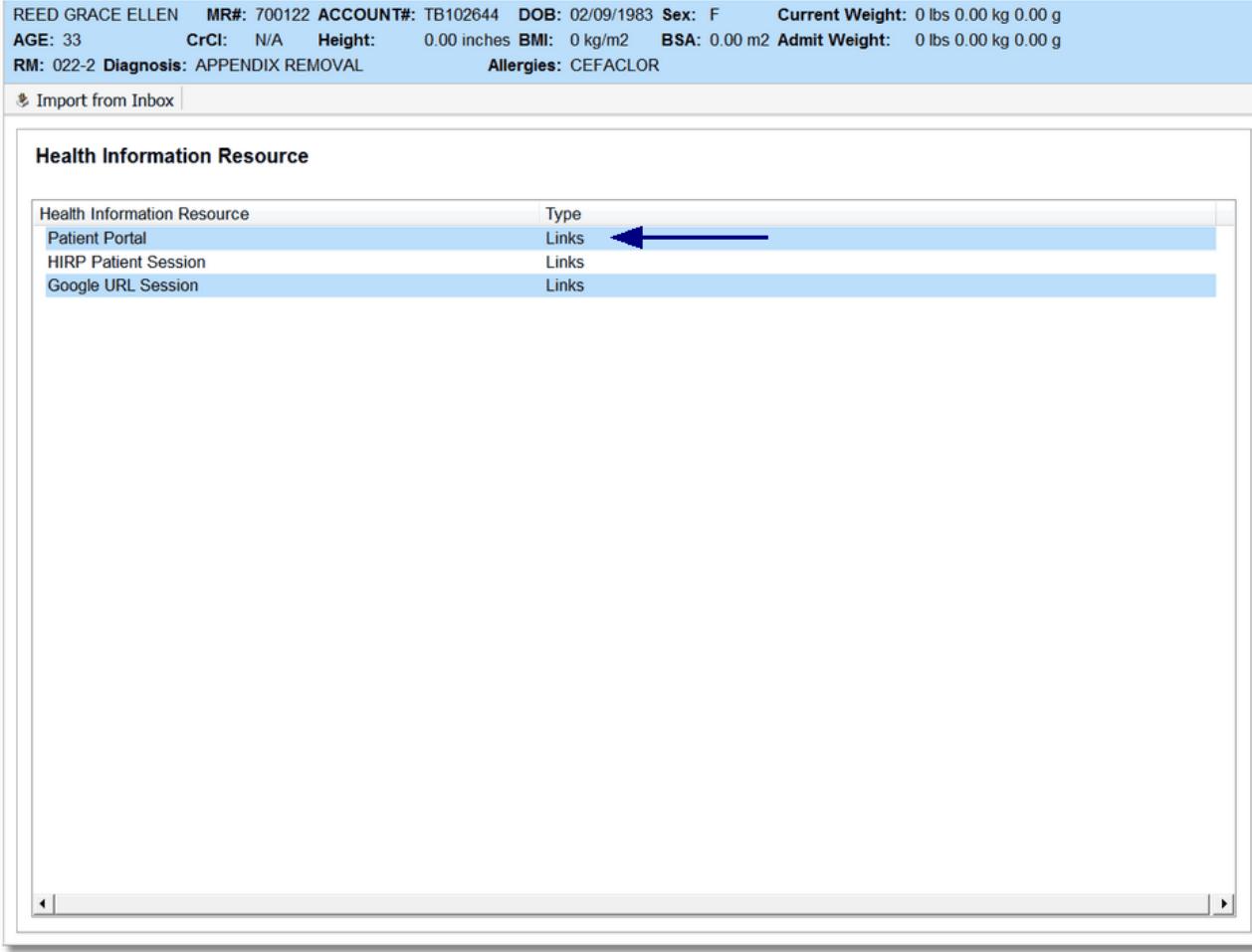
Health Information Resource

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](#)|27| *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 will be able to use the same Login information for the* www.thrivepatientportal.com. *If the facility is using Thrive Patient Portal and the patient attempts to sign into www.mymedicalencounters.com, a screen will display alerting the user that "This website has been moved! Please reset your bookmark to* 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 Secuirty screen will display for the patient to create new security questions and answers.*

Select **Thrive Patient Portal** > <u>**Please Click here to login if you have already registered or Select website address**</u>
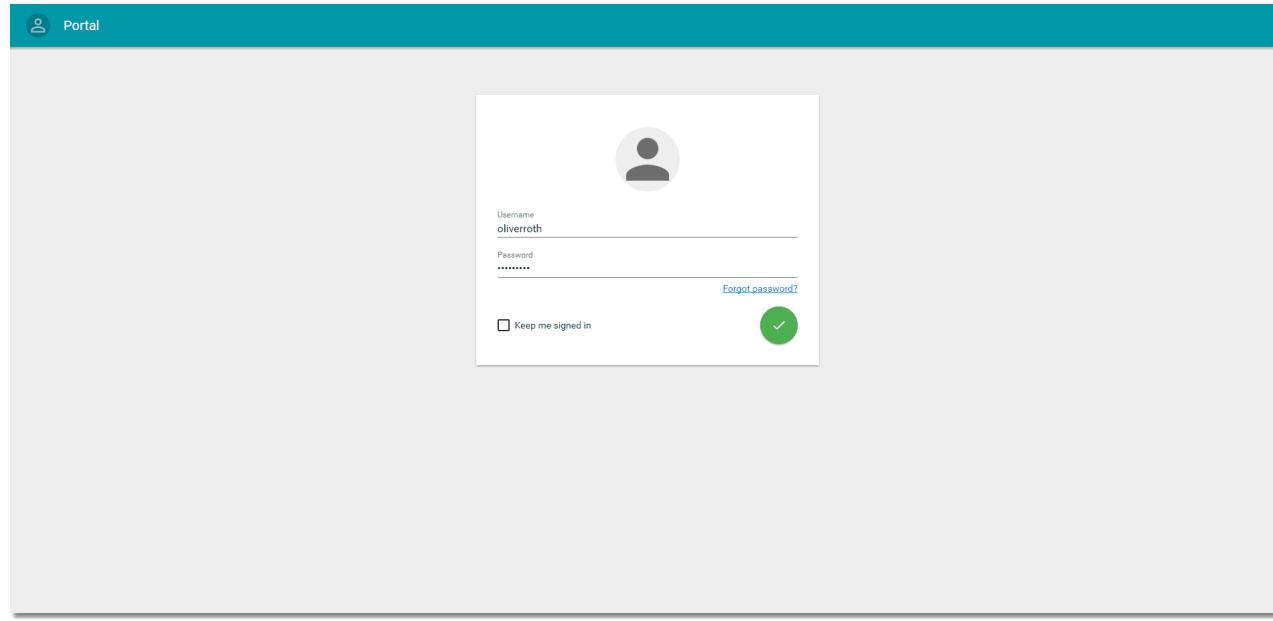
Portal Login

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 28 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 11 *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?**

Portal - Forgot Password

Forgot Password

Please enter the following information

* indicates a required field

Username*

Date of Birth* Month /Day /Year

SUBMIT

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**

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 [11] for additional information.

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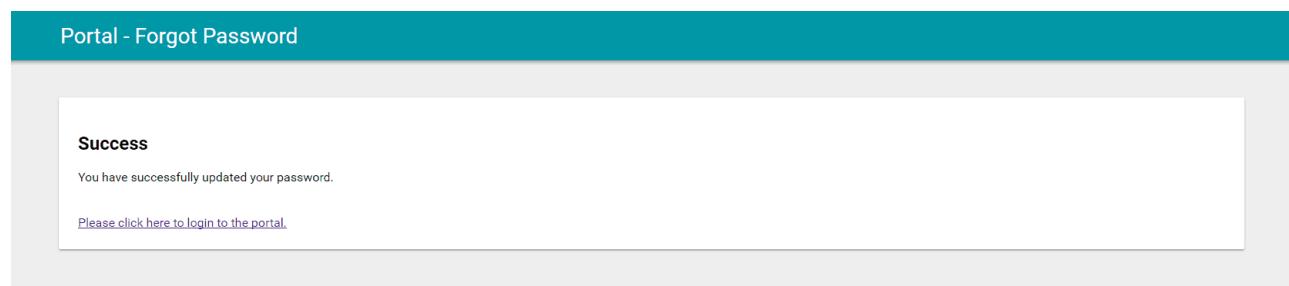
Patient Portal - Successful Password Update

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.[33]

- : Allows access to Bill Pay[54].

- : Allows access to the Medical Record[36].

- : Allows access to the Settings[54] area for the account.

- : Allows access to the Help Center[53].

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**
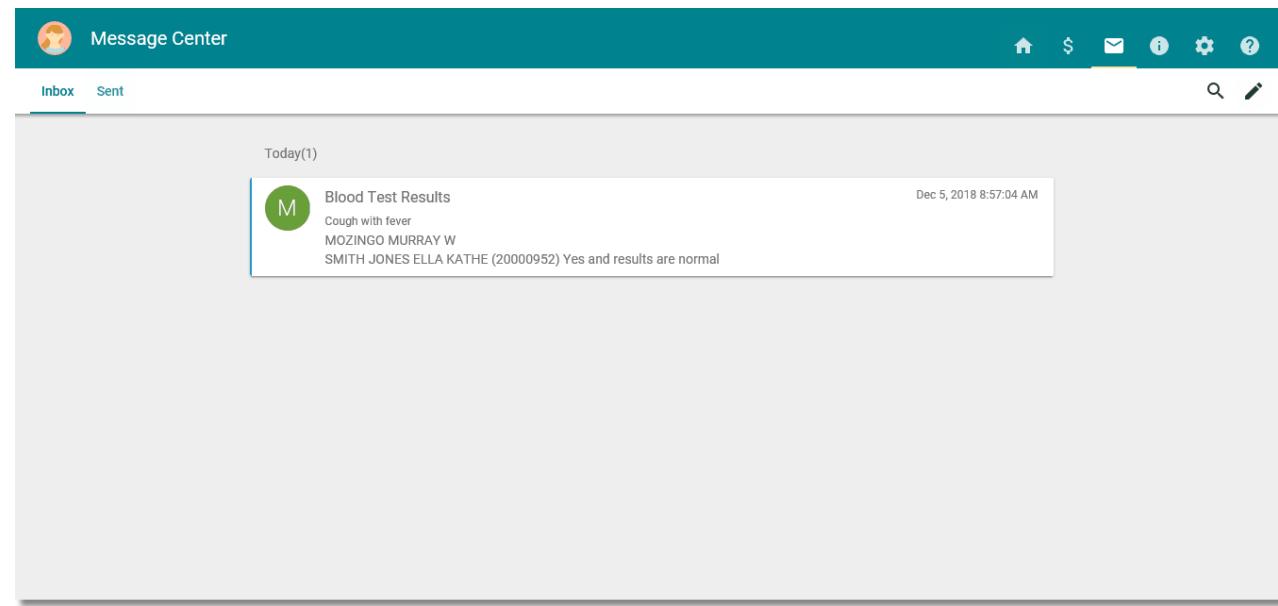
Patient Portal - Message Center

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] 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**
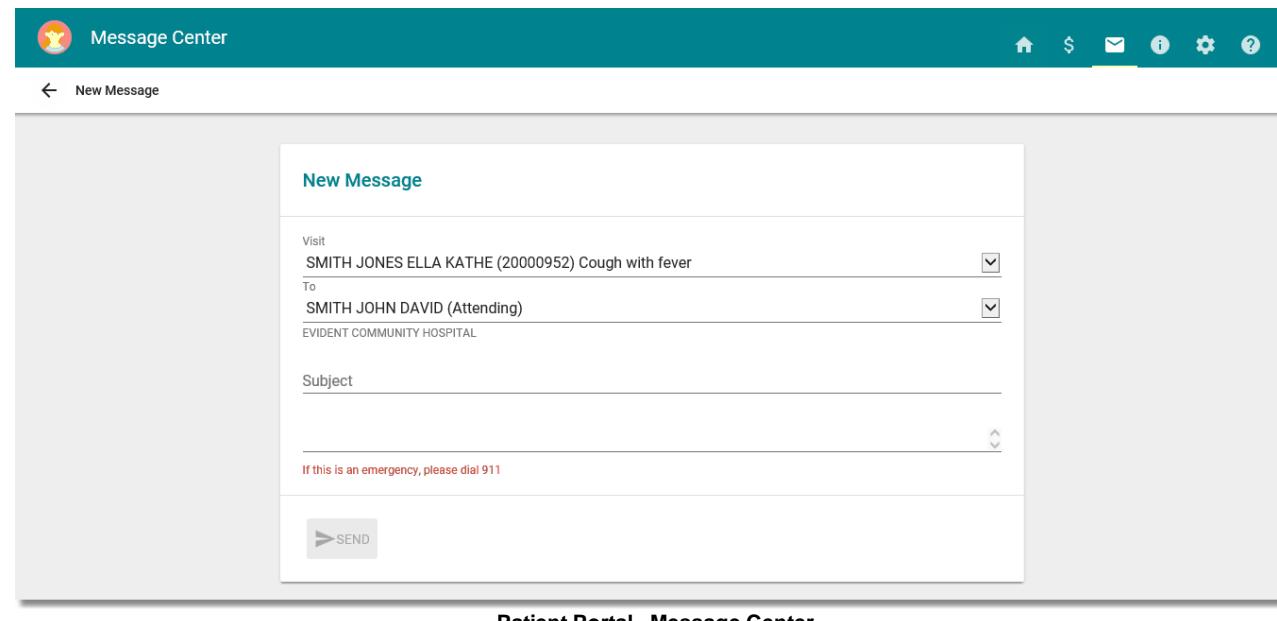
Patient Portal - Message Center

*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 38 for additional information.

Documents may also be upload to the portal if the facility has purchased the Information Submissions application. See Upload Documents 41 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 **Calender Picker**.

2. Select the **Start Date** and choose the date from the calender.

3. Select the **End Date** and choose the date from the calender.

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 > <u>Calendar Picker</u>**

Show Visits by Date

Start Date

End Date

CLEAR   APPLY

Medical Records - Visits by Date
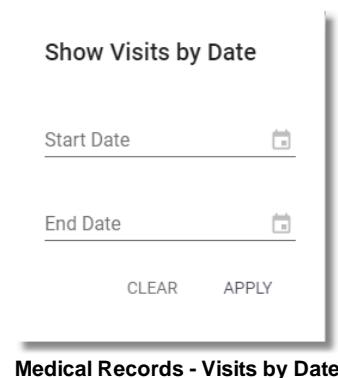
Selecting a Visit

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**

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](#) 44 to retain a copy of one of the CCDA documents, or [Transmitting a CCDA Document](#) 48 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**
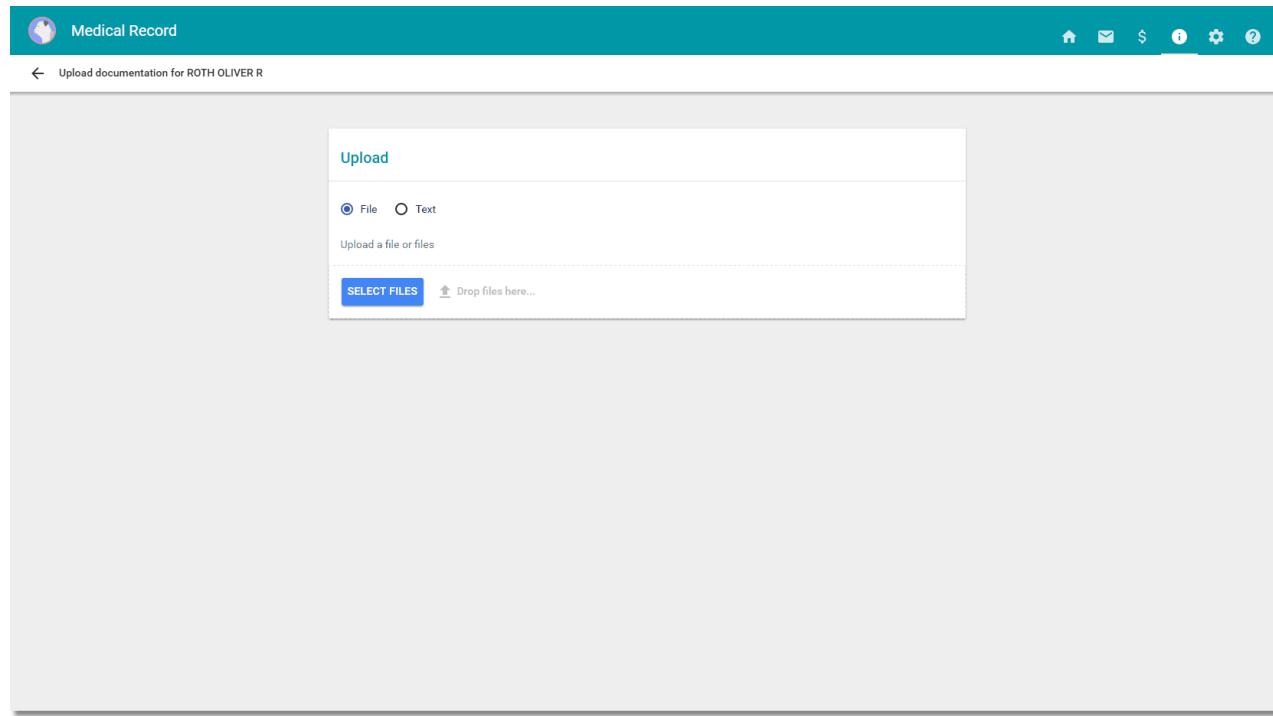
Medical Record - Upload Documents

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**
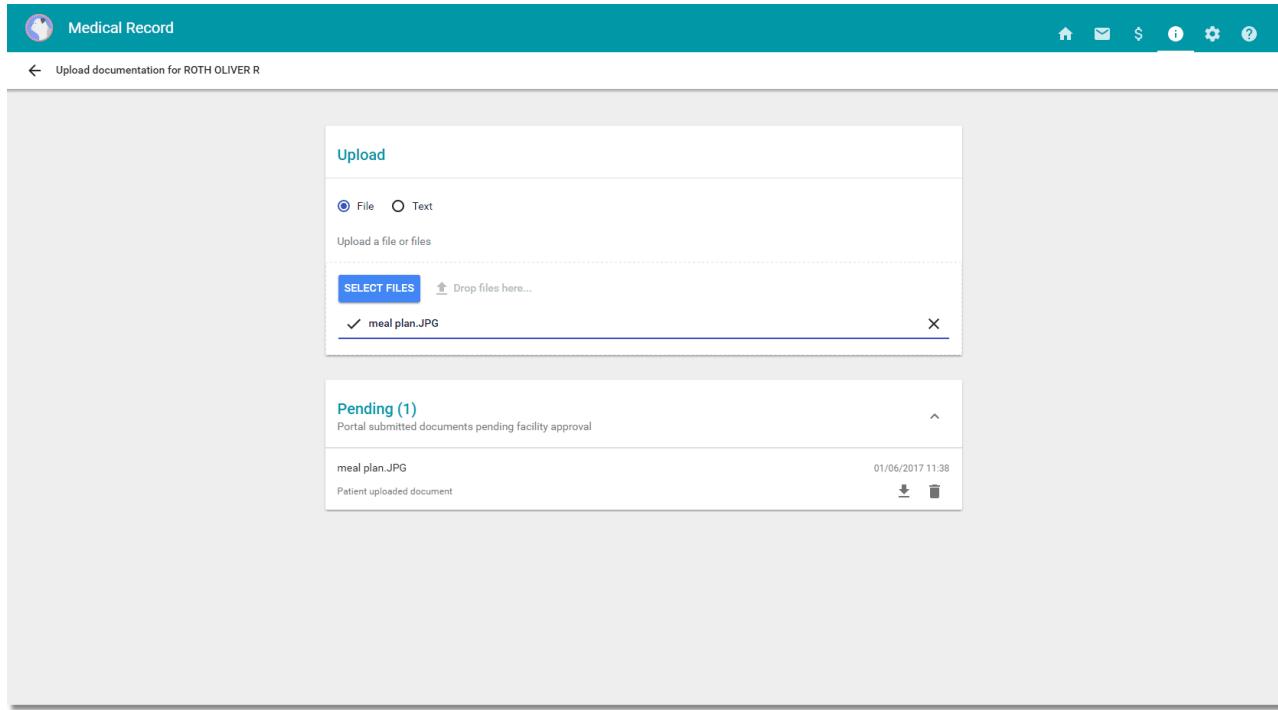
Medical Record - Uploaded Documents

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[65] 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 CCDA 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**

Patient Portal - Download Summary of Care

The selected document will then display on the screen.

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


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**
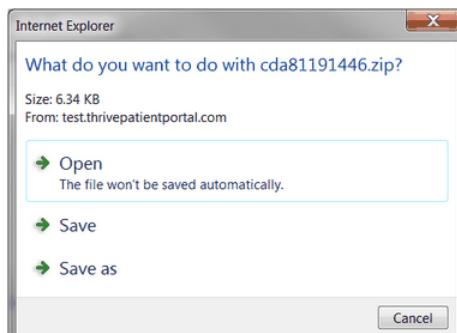
Patient Portal - Download Summary of Care

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**

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 > <u>HTML Document</u>**

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**

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__

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**

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**

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 > <u>Agree</u>**

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**
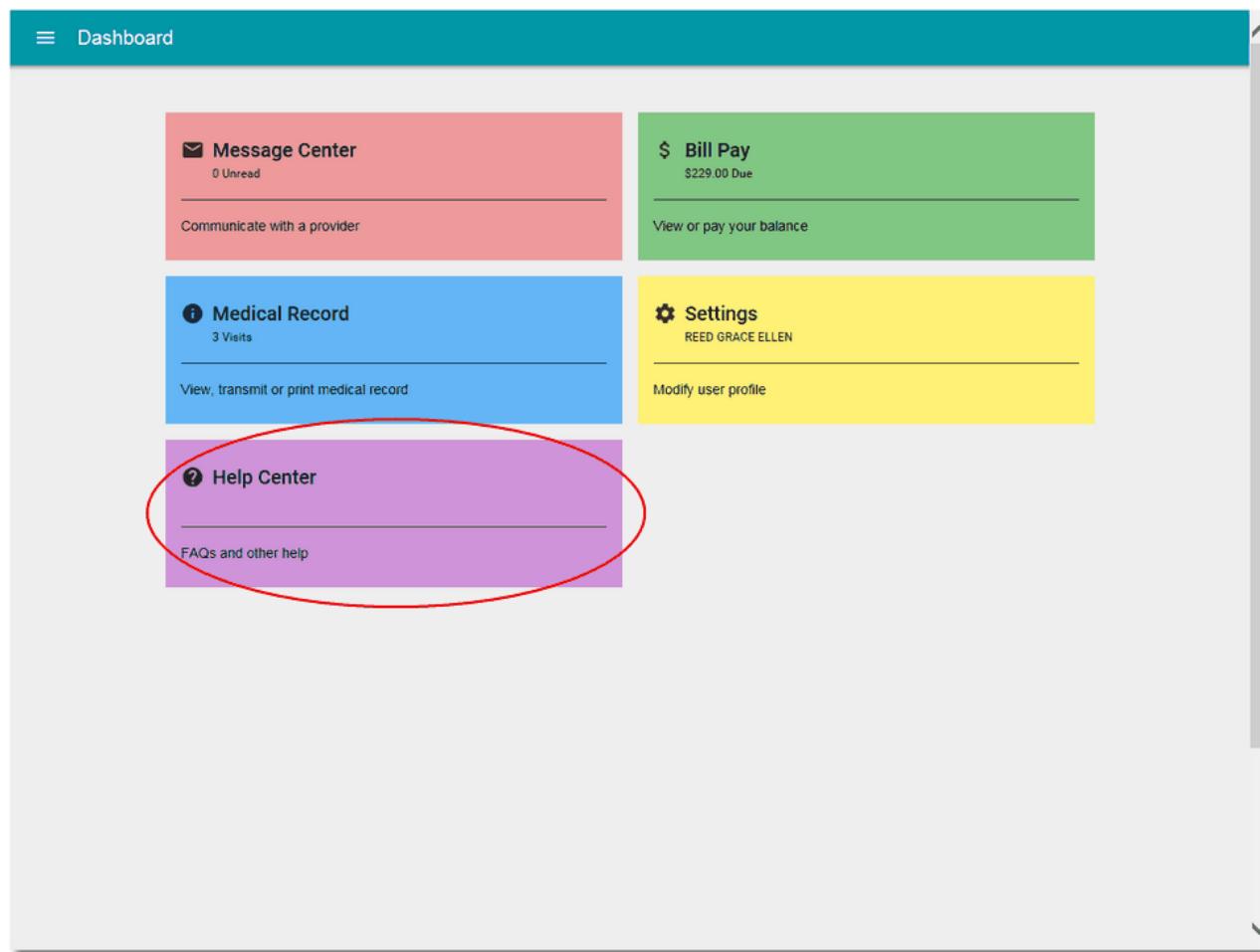
Patient Portal - Dashboard

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
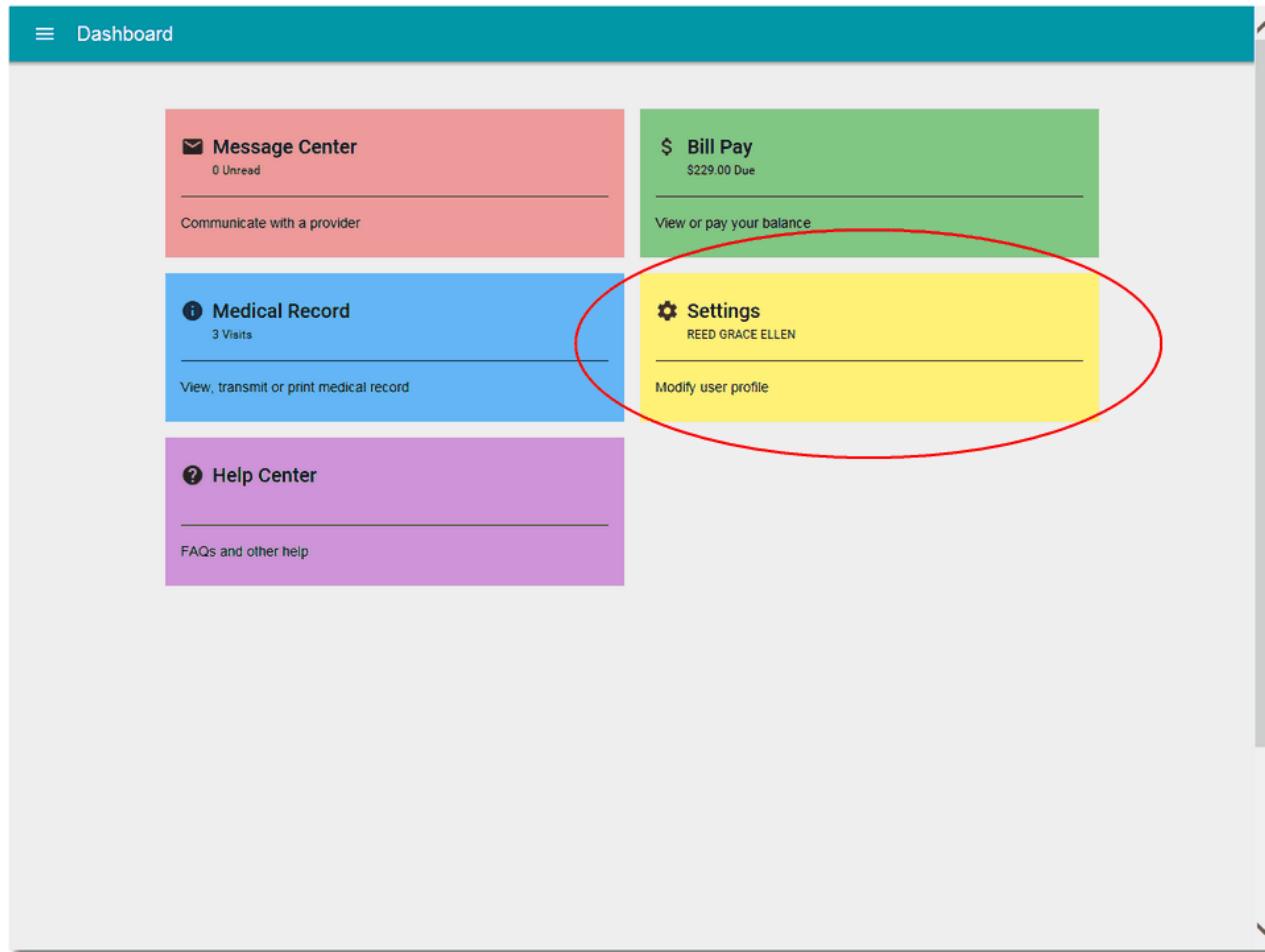
Profile

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__
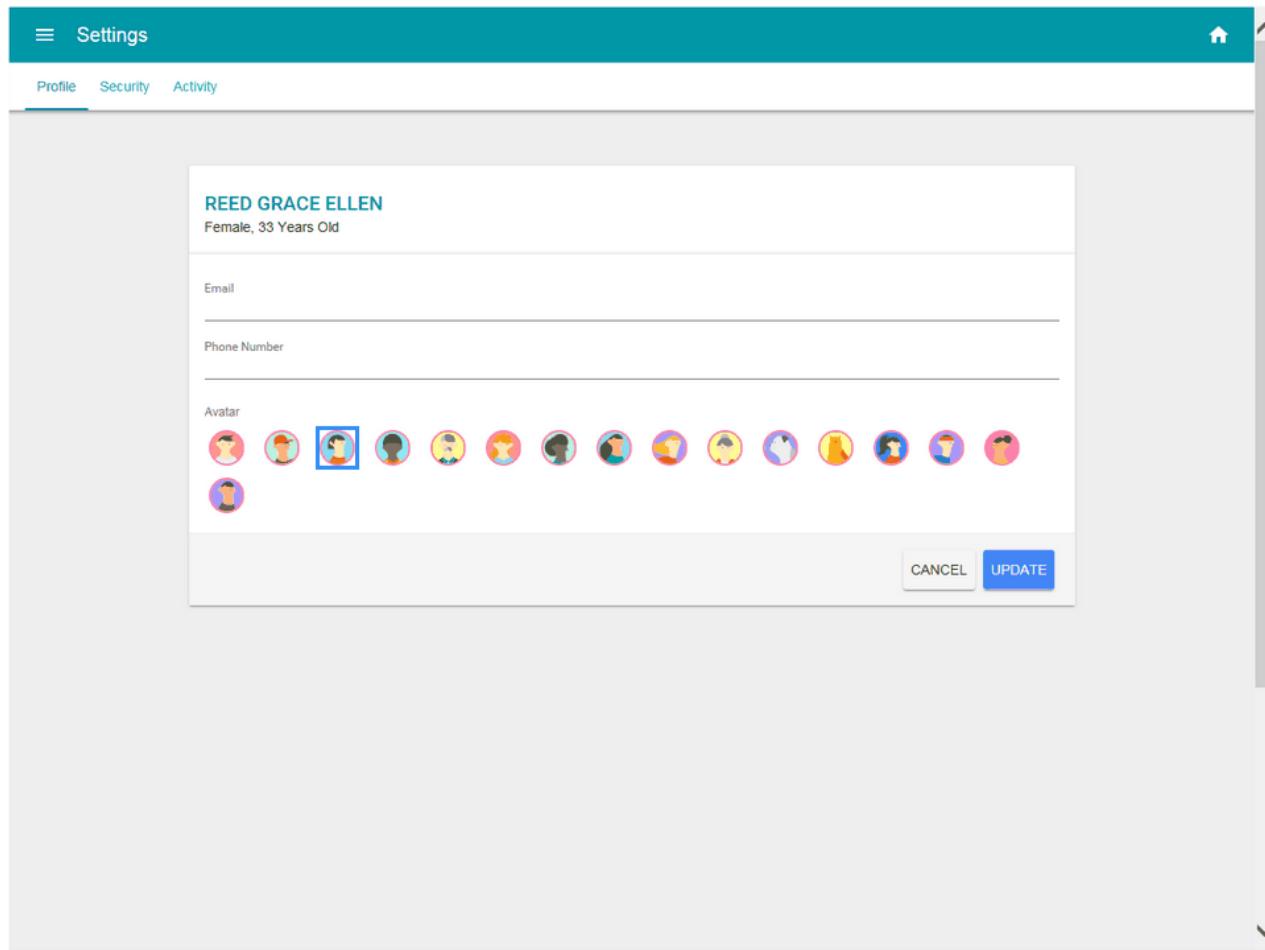
Patient Portal - Settings - Profile

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__

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 > Dashboard > Settings > Activity**

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**

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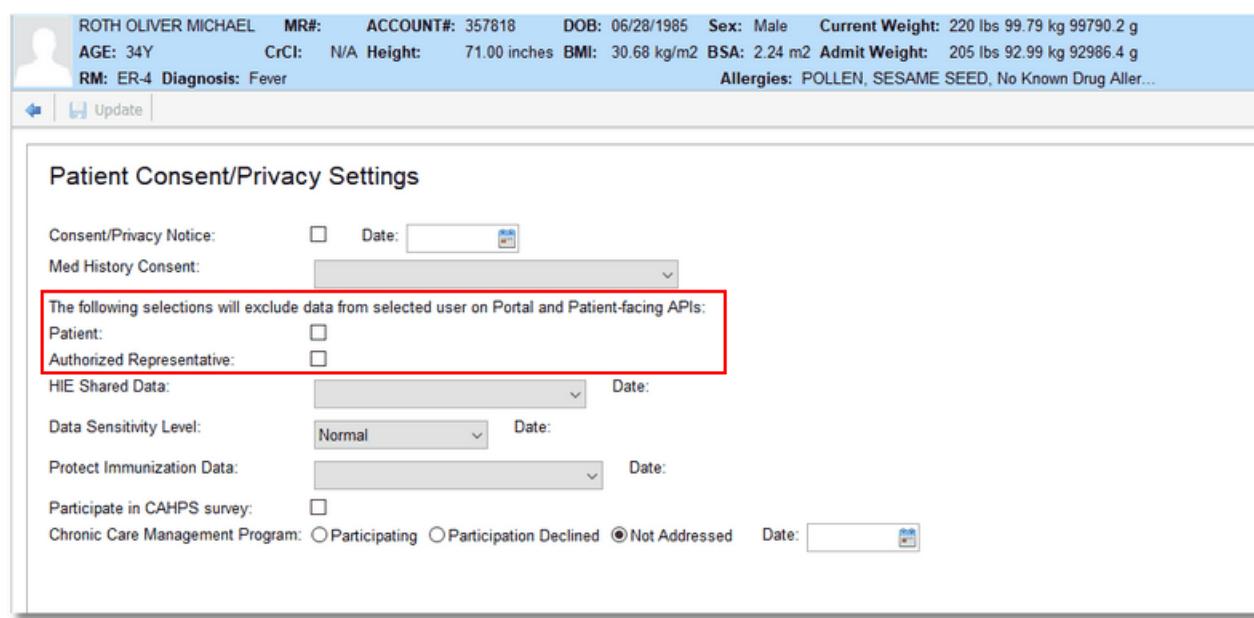
For additional information on the Patient Consent/Privacy Settings screen please see the Registration User Guide.

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**

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 > <u>Edit Exclusions</u>**
or
Select **Hospital Base Menu > Patient Account > Medical Records > Print Electronic Record > Account Number > Patient Medical Summaries > <u>Edit Exclusions</u>**
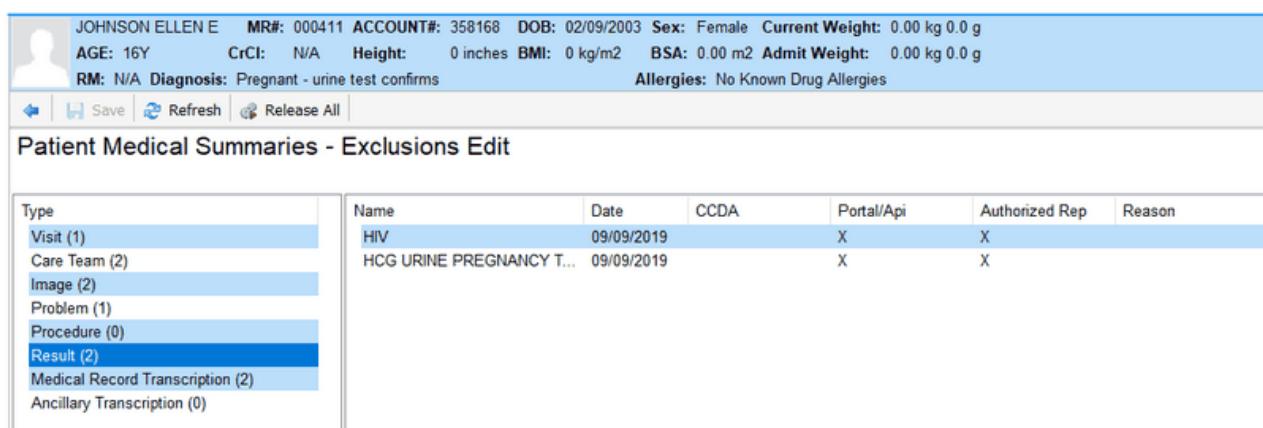
Patient Medical Summaries - Exclusions Edit

To edit an exclusion, select an item to open the Exclude From panel. This will display options for

CCDA, Portal/Api and Authorized Rep. These options may be selected or deselected, as needed, to exclude or release information pertaining to the selected item. An Exclusion Reason may also be added, but is not required. If any changes are made, select **Save** on the action bar.

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

Patient Medical Summaries - Exclusions Edit

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

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

NOTE: If a patient or Authorized Representative is logged in to the 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 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**

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__

Information Submissions - Import Document
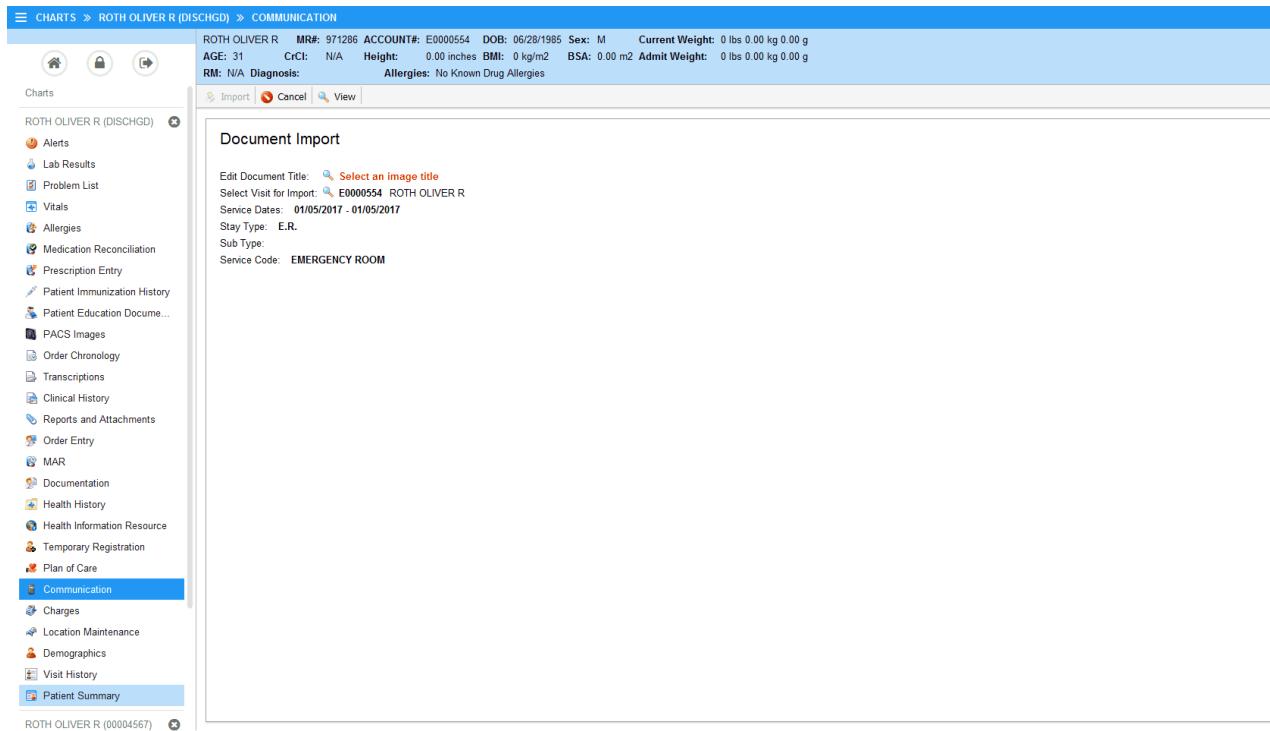
The Document Queue screen will display the Document Title, Visit Number, Service Date (Admit date - Discharge Date), Stay Type, Sub Type and Service Code. The Document Title and Visit number may be edited. If Information Submissions is accessed from the Person Profile, the visit number will need to be 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**

Information Submissions - Image Titles

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

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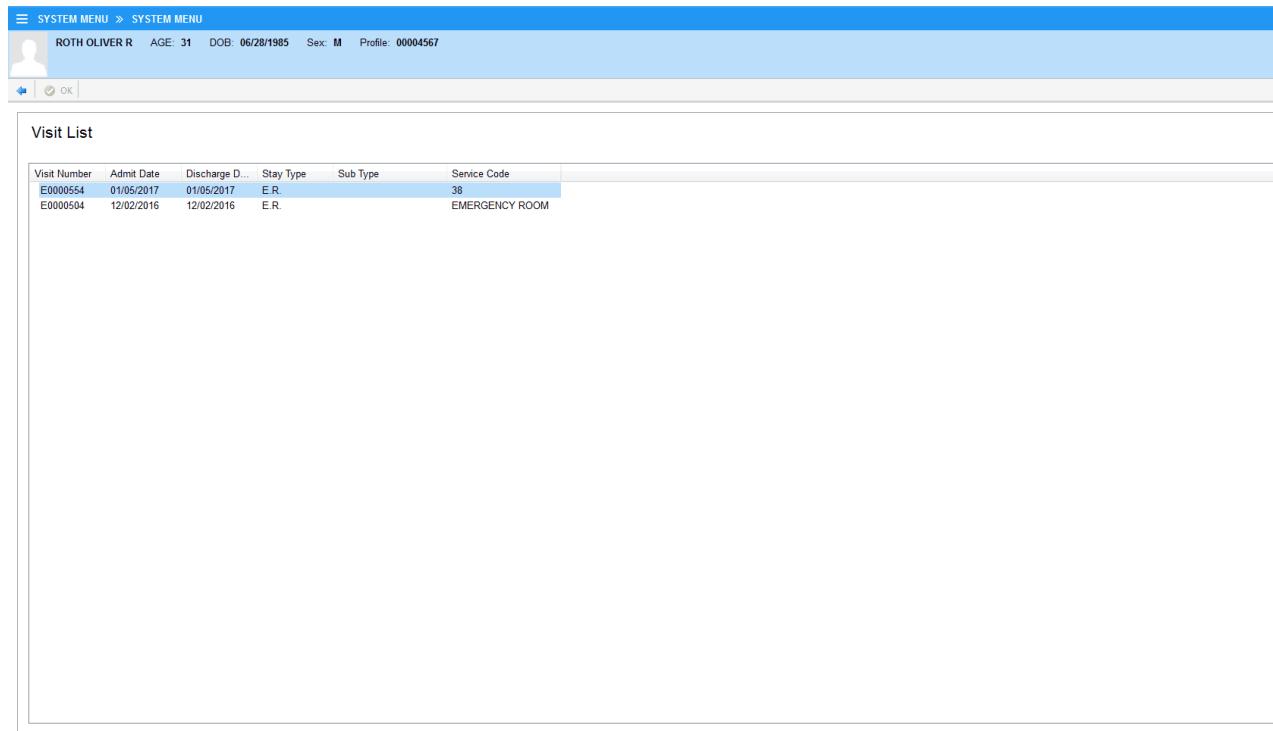
Visit List

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

6. Select **Import**.

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

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

Document Queue

Chapter 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 at view, download or transmit etc. Leave this field blank to run for all actions.
   - **Data Accessed**: Enter in the data accessed to be audited. Leave this field blank to run for all data.
   - **Include Cover Sheet**: Select this option to include a Cover Sheet with the report.
   - **Safe Mode**: Select this option if the report would not build due to bad data being in a field. If the report has bad data, a message will appear stating to run report using the Safe Mode. If selected, Safe Mode will replace all of the bad characters with a **?**. This will allow the intended report to generate. The bad data may then be seen and can be corrected from the account level.
   - **Output Format**: Use the drop-down box to select one of the following report Format options:
     - **HTML**
     - **PDF**
     - **XML**
     - **CSV**
     - **MAPLIST**
     - **TXT**

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

Description and Usage

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

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

Patient Portal Access Report

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			Evident Community Hospital					1
15:48			Patient Portal Exclusion Report					mr_patient_portal_exclusion_log.template
			05/20/2016 - 05/20/2016					
Acct Number	Patient Name	Physician Number	Physician Name	Stay Type	Service Code	Disch Date	Disch Time	Exclusion Method (A/M)
20000562	REED GRACE ELLEN	10000	Baxter J	2	LA	05/20/2016	10:30	A

Listed below is an explanation of each column.

- **Acct Number:** Patient account number.

- **Patient Name:** Patient name

- **Physician Number:** Admitting physician number on the excluded patient account.

- **Physician Name:** Admitting physician name on the excluded patient account.

- **Stay Type:** Stay type of the excluded patient account.

- **Service Code:** Service code of the excluded patient account.

- **Disch Date:** The discharge date of the excluded patient account.

- **Disch Time:** The discharge time of the excluded patient account.

- **Exclusion Method (A/M):** This column will display an "A" if the patient account was automatically excluded from the patient portal or "M" if the patient account was excluded manually from the patient portal.

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
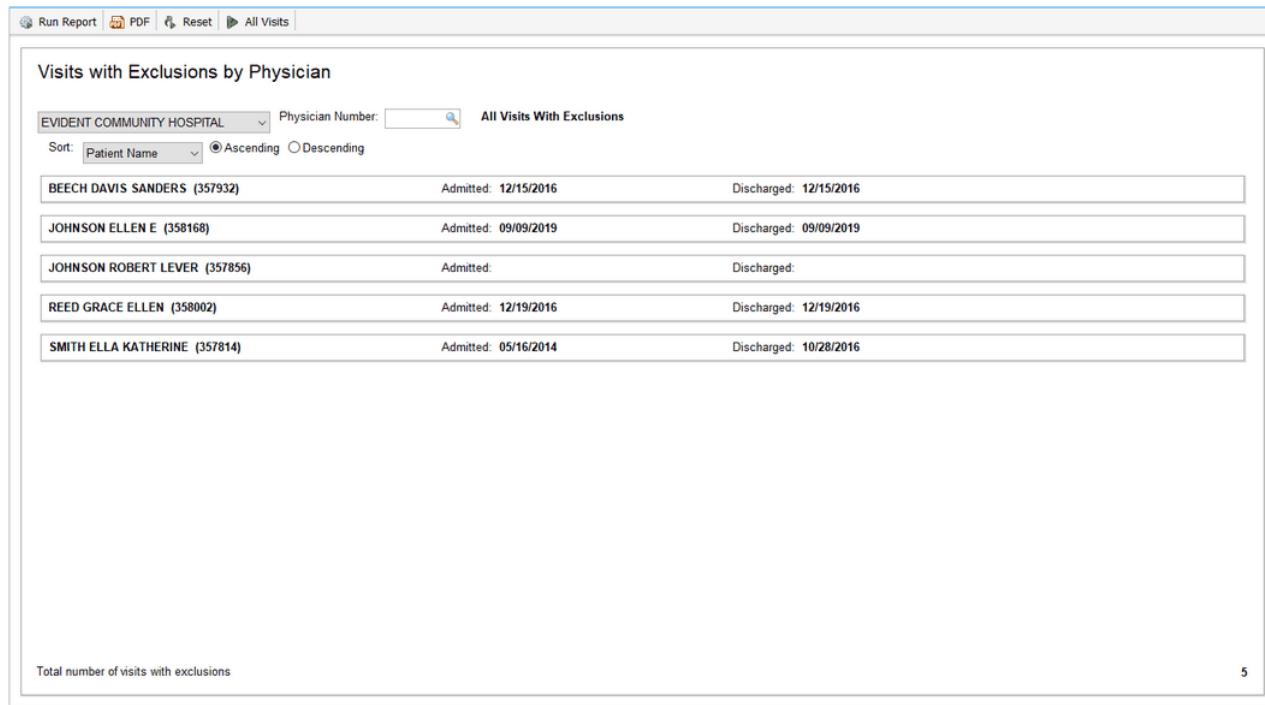
Visits with Exclusions by Physician

| 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.