eHealth Exchange Primer for NC HealthConnex Participants

NC HealthConnex Participants using the Clinical Portal can query the Orion Health™ Exchange Gateway for additional clinical information on a patient when they believe a record is available in another region. Access is provided by using the Orion Health™ Exchange Gateway (Exchange Gateway) searching capabilities.

The purpose of this manual is to describe how to query additional clinical information on a patient in another hospital that participates in eHealth Exchange. It is aimed at clinicians and other regular users of the eHealth Exchange (formerly called the Nationwide Health Information Exchange).

About the eHealth Exchange

The eHealth Exchange network (formerly called the Nationwide Health Information Network) is a network that was established by the United States government to provide a mechanism for nationwide health information exchange to improve the quality and efficiency of health care. The eHealth Exchange is a set of standards, services and policies that enable secure health information exchange over the Internet. The network provides a foundation for the exchange of health information across diverse entities, within communities and across the country.

Accessing External Patient Records

Providers may query the eHealth Exchange for additional information when a new patient arrives, and they believe there is more information available in another facility within the eHealth Exchange. This can provide critical information for emergency treatment purposes or utilized for the transfer of patients between organizations.

Note: NC HealthConnex is now connected to the below HIEs and growing rapidly. As we add neighboring states and federal agencies, these locations will be visible to search in the Clinical Portal. For now, NC HealthConnex Participants will have access to the following:

- Georgia Health Information Network (GaHIN) – Atlanta, GA
- Georgia Regional Academic Community Health Information Exchange (GRACHIE), Augusta, GA EMERGENCY ACCESS
- East Tennessee HIE (ETHIN) EMERGENCY ACCESS
- Regional HIE in Virginia (MedVirginia) EMERGENCY ACCESS
- South Carolina (SCHIE) EMERGENCY ACCESS
- Regional HIE – Coastal Connect (CCHIE) – Wilmington, NC
- Veterans Administration HIE (VHIE)

Search an External Patient Record

For carrying out an external patient search efficiently, start off by populating the required search fields first (denoted by an asterisk). Then, populate the optional fields to refine a search if required.

To locate patient information in the eHealth Exchange:

1. In Clinical Portal, search for and select a patient to display the **Patient Summary** screen.

2. Select the **External Record** icon at the top right of the screen to display the **External Patient Search screen**, as shown in the below screenshot.
3. The following fields are pre-populated with the authoritative information for the patient:

- Name
- Phone
- Address
- Sex
- Date of Birth

4. To search for a patient record, complete the following fields, if required:
   a. **Name** field - This is a mandatory field. Change this field if you want to search for a patient with a different name. You can:
      - Change the pre-populated name by selecting the **Change** link. The **Change Name** dialog is displayed, as shown in the following screenshot:

      ![Modify Name for Search](image)

      - Change the **Name** fields as required for your search and select the **Apply** button to apply the change, or select the **Cancel** link to cancel the change.
      - Add another patient name to search for, by selecting the **Add Name** icon. The **Add Name** dialog is displayed, as shown in the following screenshot:
Complete the mandatory Given Name and Family Name fields. Complete the Middle Name and Suffix (for example, Timothy Steven Oliver III where III is the suffix) fields, if applicable.

Select the Add Name button to add the specified names or select the Cancel link to cancel the entries.

Remove an added name by selecting the Delete icon.

b. **Phone** field - if you would like to include a phone number in the search, you must use the expected phone number format; for example: +1-201-555-0123. If an incorrect phone number format is used, an error message will be displayed.

c. **Sex** field - you can change the gender by selecting the appropriate button.

d. **Address** field - you can:
   - Delete the address by selecting the Delete icon.
   - Add an address by selecting the Add Address + icon. The Add Address dialog is displayed, as shown in the following screenshot:

   ![Add Address for Search](image)

   - Complete the fields and select the Add Address button to add the specified address or select the Cancel link to cancel the entries.
   - Change the address by selecting the Change link. The Change Address dialog is displayed.
   - Complete the fields and select the Apply button to add the changed address or select the Cancel link to cancel the entries.

e. **Date of Birth** field - this field cannot be changed.

f. **SSN** field - you can enter the patient's SSN.

g. **Purpose** field - this field is used to indicate the reason this information is required. This is set to Treatment by default. You can select another reason from the Purpose dropdown list.
h. **Location** field - this field is used to select the locations to search. When you select the **Search** button to initiate the search, all selected locations appear in a table, in alphabetical order.

When searching multiple locations for external patient records, a search error for one of the locations will not stop the whole search. The Exchange Gateway application will continue to search for external records in the other locations specified.

- To search all the locations, select the **All** button.
- To select one or more locations, select the **Change** links to the right of the listed locations. The **Select Specific Locations** dialog is displayed, as shown in the following screenshot:

  ![Select Specific Locations](image)

  - Selected Locations are listed in the **Selected Locations** column.
  - To add a location, select the location in the **Available Locations** column and select the right arrow icon.
  - To remove a location, select the location in the **Selected Locations** column and select the left arrow icon.

You can also remove a location by selecting the **Remove** icon inside the location button on the **External Patient Search** screen, for example: . If all of the locations have been deleted an error message appears to the right of the **Change** link: At least one location must be selected. This error message also appears if you select the **Search** button with no locations selected.

- To apply your location selections, select the **Apply** button.
- Selecting the **Reset to Defaults** link refreshes the search filter to its original state.

5. Select the **Search** button. The system searches the gateway for patient records that match the exact Name, Sex and Date of Birth of the selected patient. If a match is found, the result is displayed below the search criteria.

You do not need to wait for Exchange Gateway to finish the search before you select a record to view. Exchange Gateway will continue to search for records while you view a document. When you select the **External Patient Search** link at the top left of the page to navigate back to the search results, you will find additional records to view.
View an External Patient Record

You can view an external patient's records after receiving a successful result from an external patient search in Clinical Portal.

**Supported document and file types for viewing**

Exchange Gateway currently supports viewing of CCD, CDA, CCR, and PDF documents in Clinical Portal. Exchange Gateway also supports the viewing of text files and various types of image files.

**Viewing An External Patient Record**

To view a patient's record from an external gateway:

1. Search for a patient.
2. Select the **View External Documents** link. The documents are listed in a navigation tree on the left of the screen, as shown in the below screenshot:

   The system searches for all Stable and On-Demand documents related to the patient. However, the type of documents returned from the search may not include both Stable and On-Demand document types, depending on what documents are found for that patient.

3. Expand the relevant folder and select the document you want to view. The selected document is displayed, as shown in the following screenshot:

You can go back to open another document listed for the searched gateway without having to re-search the patient. To do this, select the **External Patient Search** link at the top left of the page to navigate back.
PDF documents can also be viewed, as shown in the following screenshot:

Title of displayed documents

Most documents displayed in the navigation tree are displayed with the following format: 
<date> <document title> Some exceptions include:

1. **Untitled documents** – Documents registered in the document repository without a title are displayed in the navigation tree in one of the following formats, depending on what classCode values are available in the repository for that document (a classCode is an identifier that describes a document's type, and has code and definition values which specify the particular document type for that document):
   - <date> Untitled document <classCode code>
     For example: 13-May-09 Untitled Document (38619-5).
   - <date> <classCode definition>
     For example: 13-May-09 Discharge Summary.

2. **On-demand CCD documents** – The display title of On-Demand CCD documents are not preceded with a date.
**Downloading an External Patient’s Documents**

Some external patient documents cannot be viewed even when selected in the External Documents view in Clinical Portal. When these documents are selected, a dialog will display on the screen that gives you the option to download the document. You can download the document and then use a different application to view the document.

When downloading documents, you are downloading data that contain sensitive patient information. Ensure that you store documents securely after downloading, or delete them.

**About On-Demand Documents**

Documents are assembled when requested so they always contain the most up-to-date information. Previously, these documents were referred to as Deferred documents in the eHealth Exchange specifications. However, the latest specifications stopped using Deferred documents in favor of On-Demand documents. In the eHealth Exchange, an On-Demand document is presented in the form of a CCD, or 'patient snapshot'.