CLINICAL SUPPORT USER

Guide

v.1.0

Beacon Community Program

MyHealth ACCESS NETWORK

Clinical Support User Guide

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Clinical Support User Guide Overview

MyHealth Access Network

Intended Audience

This guide is designed for clinical support staff.

Clinical Support Users are employed by organizations or practice and participate as members of the MyHealth Access Network.

Guide Overview

This guide will teach you how to:

- Search for a patient in MyHealth
- Address instances of duplicate patient records
- Locate your Direct secure messaging inbox
- Manage your account
- Implement MyHealth into your daily workflow
- Talk with your patients about MyHealth
- Identify the key components of MyHealth privacy and security design
- Identify MyHealth user roles
- Understand how your organization participates in MyHealth

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Introduction

Welcome to the MyHealth Access Network Clinical Support User Guide!

Purpose

The purpose of this guide is to support Clinical Support Users of MyHealth Access Network in using the MyHealth portal. This guide will introduce you to the MyHealth network, describe the network's privacy and security design and processes for protecting patient privacy, and provide step-by-step instruction on how to use the MyHealth portal.

Clinical Support User Video

Guides are not for everyone. If you prefer a visual or auditory approach to learning, please watch the Clinical Support User Video located in the MyHealth Training Center at www.myhealthaccess.net/my-health/training-center. The site also contains additional learning resources to supplement this guide.

About MyHealth

MyHealth Access Network is a non-profit coalition of Oklahoma health care organizations working together to improve health care quality and the health of area residents while controlling costs.

MyHealth Access Network is one of a few national recipients of a three year federal Beacon Community Award from the Office of the National Coordinator for Health Information Technology (ONC) to provide seed funding for this community health improvement initiative.

MyHealth seeks to encourage greater communication and coordination among care providers through expanded use of health information technology and health information exchange. Partners include: hospitals; physician practices; first responders; university medical systems; tribal health systems; safety-net or essential care clinics; laboratories; public health organizations; employers; public leaders; health insurance companies; pharmacies; patients and specialists.

The Beacon program is part of the Office of the National Coordinator for Health Information Technology within the Department of Health and Human Services. Each of the 17 Beacon Communities builds and strengthens heath IT infrastructure and information exchange capabilities to pursue a new level of sustainable health care quality and efficiency, tests innovative approaches to improve health care. These investments are part of a larger movement to modernize health care, and will position communities to

achieve measureable improvements in population health, care and cost, and succeed in a transformed payment environment.

The MyHealth portal is a web-based technology that brings information from diverse sources (data suppliers) to be demonstrated in a unified way (MyHealth portal).

Participating in MyHealth

Why Your Organization Joined MyHealth

It would be an enormous understatement to say that healthcare in America is changing. Central to the healthcare revolution are the concepts of accountable care and Meaningful Use. Health systems, providers and other healthcare professionals are joining health information exchanges to meet the demands of the evolving market. MyHealth participating members connect to MyHealth for various reasons, including:

- Improved access to pertinent patient medical records
- Tools to facilitate collaboration among providers on behalf of patients
- Dynamic patient-specific risk evaluations
- Meaningful tools for identification of patients with specific health needs, and
- Improved workflow efficiencies to improve quality and reduce costs

How Your Organization Participates in MyHealth

Organizations participating in MyHealth can do so in two ways (one of these, or both):

1. Data User – (also called Data Recipient) meaning your organization's employees can only view information.
2. Data Supplier – meaning your organization is contributing, or supplying, data into MyHealth (i.e. EMR, specific data feed).

Your organization has already chosen a type of participation. Organizations can change their type of participation at any time.

MyHealth User Roles

There are five user roles for the MyHealth portal. Each role has specific privileges based on need for health information.

Life Critical User

Definition: Clinical person with high level of trust and likelihood of seeing patients in life-threatening situations
Permission: User can view all of the data in a MyHealth patient record, and can "break the glass" by declaring an emergency situation for accessing information about a patient who has opted out.

Clinical User

Definition: Clinical person providing standard care to patients
Permission: User can view all of the data in a MyHealth patient record

Ancillary Care User

Definition: Allied health or other care coordinator or specialty provider who is part of the clinical care team, and needs medical records to effectively perform job duties.
Permission: User can view all of the data in a MyHealth patient record

Clinical Support User

Definition: Staff support for clinician, may validate user is in system, not opted out and verify demographics, insurance, and basic clinical information.
Permission: User can view demographics, and limited data related to claims and billing in the MyHealth patient record

Admin Support User

Definition: Scheduler or coordinator who may validate user is in system, not opted out, and verify demographics.
Permission: User can view patient search only.

Your Role as Clinical Support User

As a Clinical Support User you play the role of identifying whether a patient's records exists in MyHealth, identify any duplicate records, and access information in the portal to assist with efficient claims and billing.

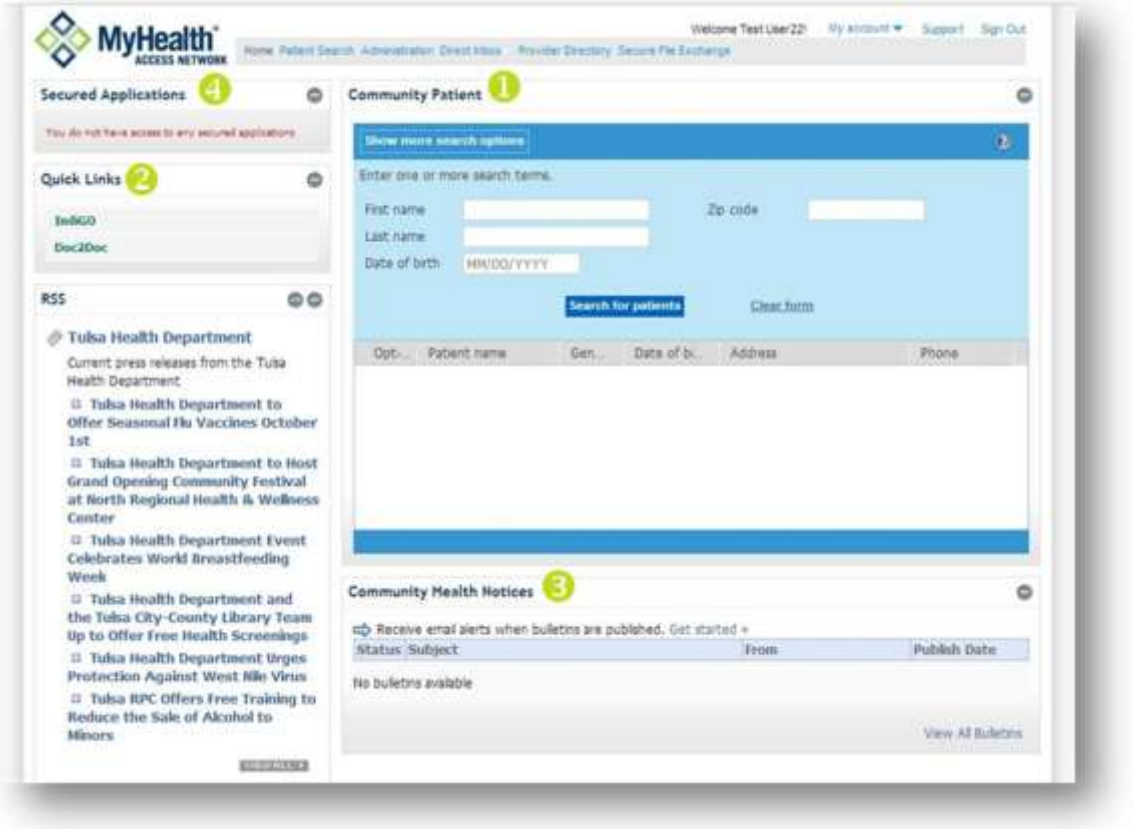
You may also be a point of contact when patients have questions about MyHealth. Your organization has developed patient information sheets to inform patients about the organizations involvement with MyHealth and has developed a process for assisting patients who want to opt out of MyHealth. Opting out means the patient's information will not be visible to any MyHealth user, including physicians.

Before the specifics of your role are discussed in this guide, take a quick look at how the MyHealth portal is set up and how to perform some basic functions.

MyHealth Portal Basics

Portal Layout

The MyHealth portal initial screen layout includes four portlets.



Portal Layout Descriptions

1. **Community Patient Search Portlet**

   The purpose of this portlet is to search for patients across the MyHealth Community. Users with the privilege of Web-service Community Patient Search can search for a patient's record

2. **Quick Links**

   This portlet appears when you have access to other MyHealth products.

3. **Community Health Notice**

   Communication bulletins to all users are posted in this portlet.

4. **Secured Applications**

   This portlet is for MyHealth administration only. You will not have access to this portlet.

Toolbar Tabs

Across the top of the portal, you will see a list of tools. Based on your access, these may not all be visible.

1 **Home**

The HOME tab will take you to the initial portal screen from anywhere in the portal. Please note: If you are in a patient record the HOME tab will take you out of the patient record.

2 **Patient Search**

This tab can take you to the patient search feature from any page.

3 **Direct Inbox**

Each MyHealth user may have access to one or more Direct secure email accounts. "Direct" is a national effort to create secure messaging between providers, and in some cases (where authorized), with patients. Click on this tab to open your Direct mail. If, instead of clicking, you point at this tab, a drop-down titled MAILBOX USER MANAGEMENT will appear which allows you to configure Direct account sharing (in case you need to share with a colleague, nurse, etc.). This function is explained in its own training video and guide at the Training Center at www.myhealthaccess.net.

4 **Secure File Exchange**

The purpose of this tab is to enable community-wide sharing of sensitive documents. If MyHealth or your organization's administrators direct you to documents in the MyHealth Secure File Exchange, this is where you go to find them. Your organization may decide to use this feature in other ways, in which case you'll receive additional guidance about this from your organization's administrators.

5 **My Account**

Point your mouse arrow at My Account to access a list of options. The only one of interest to you is My Profile. Click on this option to view and edit your profile, change your password and request additional service packages (your system administrator will handle these requests for you). **Important:** On this page, click "Edit my profile", then change your 'Challenge question' and 'Challenge answer', which will be asked to you if you ever forget your password or become accidentally locked out.

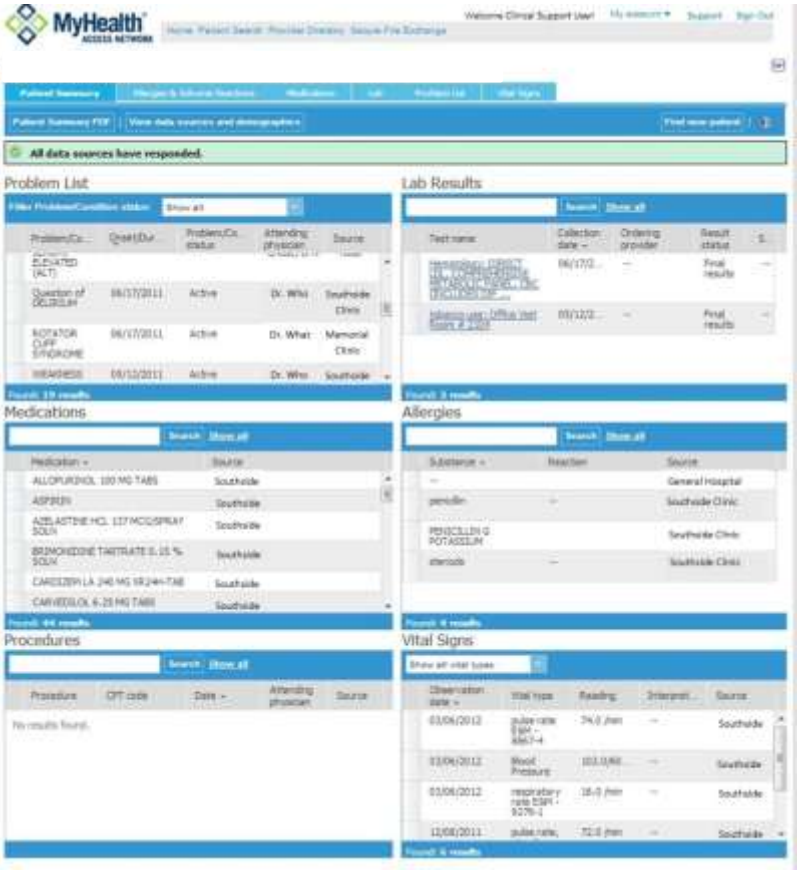
Your View of the Patient Record

Although you are not able to access all of the information in a patient record in your role, you are able to view the following information:

Problem List
View Problems the Patient has presented with to providers

Medications
View Medication History

Procedures
View Procedures the patient has had



Lab Results
View Lab Results

Allergies
View Allergies or Adverse Reactions the patient has

Vital Signs
View Vital Signs

MyHealth Data Status: A Word About Current Data in MyHealth

Two important things to know about the data in MyHealth

1. **It's Your Data**

   The data is owned by the organization/practice pushing information from their respective EMR into MyHealth.

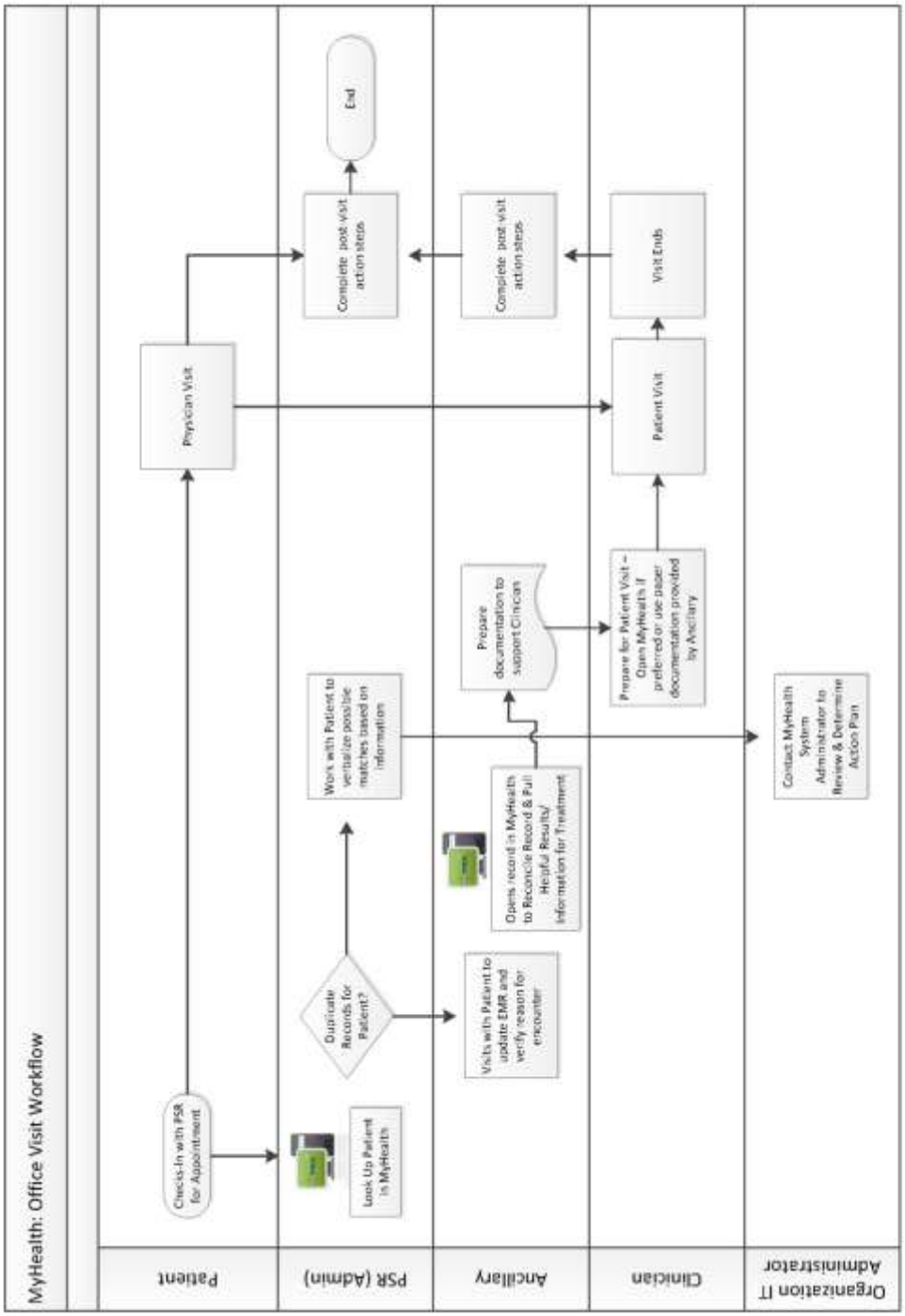
2. **Data is Loaded Continuously**

   While MyHealth has a substantial amount of information available, it is still a work in progress. As large health systems, FQHCs, critical access hospitals and providers begin loading data into MyHealth you will see the information grow richer and richer. Additionally, some organizations have loaded five years' worth of data into the portal while others have loaded just two years and some are only loading from their MyHealth begin date forward.

Didn't find any data on your patient? Keep looking, Data is being loaded continuously.

Implementing MyHealth Into Your Daily Workflow

Your organization has developed workflows for implementing MyHealth into your daily practice. While each organization and/or department within an organization may implement MyHealth a bit differently, the general workflow looks like this:



Basic MyHealth Workflow

Role	Action	Material
Patient	Checks in with the PSR	Dependent
PSR	Incorporates looking up the patient in MyHealth and determines if duplicate records exists	
	If no duplicate record exists then the PSR passes the record to the Ancillary care to process	MyHealth record(s)
	If duplicate records exist, then the PSR works with the patient to verbalize possible matches based on the information (address, birthdate, first name, last name, middle initial, etc.). The PSR communicates to the organizations IT staff if a problem exists. The IT staff works with MyHealth to resolve.	Dependent
Ancillary Care	Includes looking up the MyHealth record to reconcile medications, pull helpful results, history or encounters. Information can be created as a PDF and printed/scanned and placed in patient record. If needed, information is presented to the Clinician or the Clinician is notified that information exists in the MyHealth record that could be beneficial to the visit.	MyHealth record or paper printout
Clinician	Prepares for patient visit by either reading the information printed by ancillary staff or pulls the patient record up in MyHealth.	Paper Printout of MyHealth Information or MyHealth record
Ancillary Care	Completes post-visit action steps	Dependent
PSR	Completes post-visit action steps	

Break-the-Glass Workflow

Oklahoma is an opt-out state in regards to health information exchange. This means a patient's information is included in the MyHealth portal if their healthcare provider is a member of MyHealth. Patients can choose to opt-out of MyHealth. There are exceptions that allow a patient's health information to be accessed in an emergency situation. The only way the information can be accessed on a person who has opted out of MyHealth is for a Life Critical User (one of the five MyHealth user types) determines the information meets the emergency criteria or when the patient has decided they would like to opt back into MyHealth.

Break-the-Glass Workflow

Role	Action	Material
PSR or Ancillary Care User	Identifies that patient has opted out of MyHealth	MyHealth patient search
Life Critical User	Determines that the situation is: A) An opt-in situations (meaning the patient signs an opt in form in your presence) or B) Is an emergency and meets the qualifications for break-the-glass. This includes: **OPT IN** Front-desk staff have the MyHealth opt-in form that can be signed and witness in your presence. The form is also available at http://myhealthaccess.net/my-health/forms **EMERGENCY SITUATION** An "Emergency Situation" means a sudden onset medical or behavioral condition that presents itself by symptoms of sufficient severity, including severe pain that a prudent layperson, possessing an average knowledge of medicine and health, could reasonably expect the absence of immediate medical attention to result in: • Placing the health of the person in serious jeopardy, or in the case of a behavioral condition, placing the health of such person or others in serious jeopardy; or • Serious impairment to such person's bodily functions; or • Serious dysfunction of any bodily organ or	Break-the-Glass Policy MyHealth portal

part of such person; or

- Serious disfigurement of such person.

Upon accessing the opted out record, a justification screen is presented to the Life Critical User.

The User must attest that:

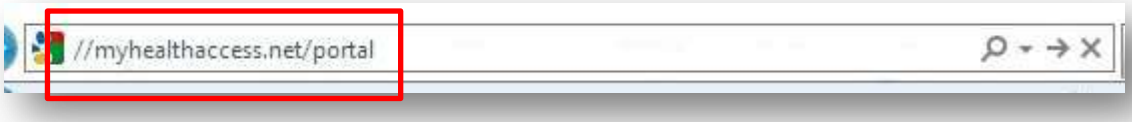
- The access request is due to an emergency situation,
- That the treating clinician determines that PHI that may be held by the MyHealth System could be material to treatment and,
- They acknowledge that the access event will be closely reviewed and that additional information may be requested at a later date.

Access to the PHI in an emergency situation terminates with the completion of the emergency treatment.

MyHealth	MyHealth will maintain a record of Emergency access and will review instances of emergency access.

How Do I Log On to MyHealth?

To access the MyHealth portal, enter the following address in your internet browser address:



If you encounter an error message when attempting to access the portal, please contact your organizations IT support to help you solve the issue.

Portal LOG ON PAGE

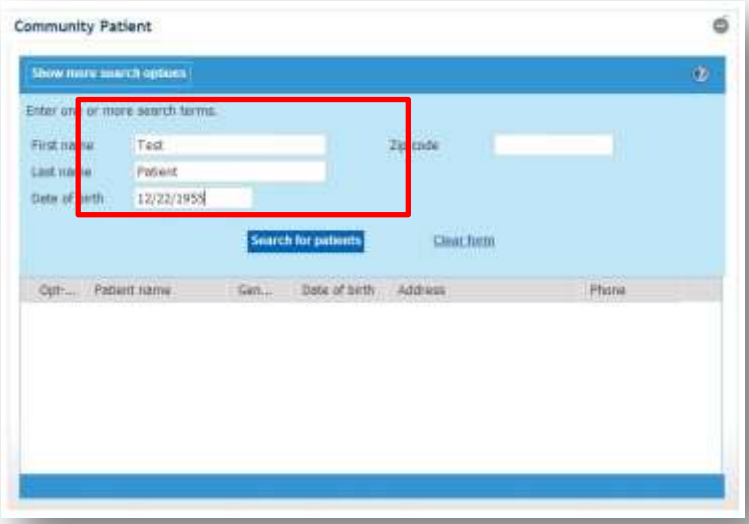
To log on to the portal enter your USER ID and PASSWORD. Forgot your ID & Password? Contact your organization's system administration.

To obtain help with the portal, please contact your organization's system administrator.

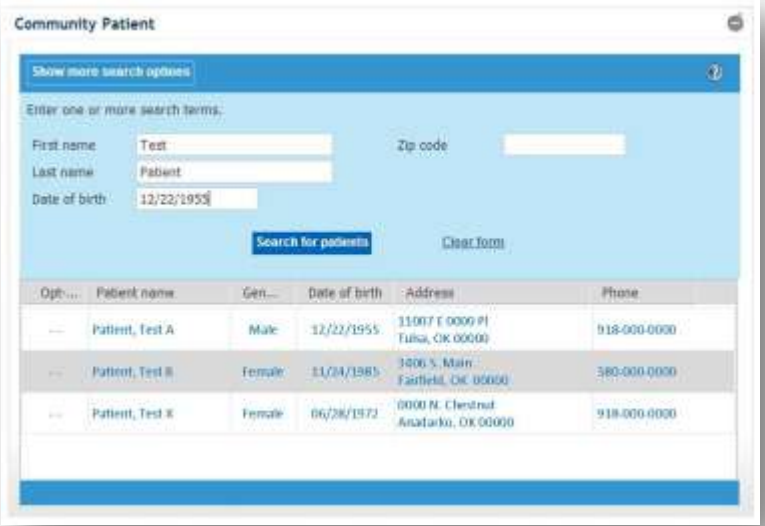
Search for a Patient

As an clinical support staff, you are responsible to only search for patients your organization/practices is treating (regulated under federal and state laws, your organization's policies, and your MyHealth User Agreement). Patient searches are logged, reviewed, and investigated. Patient privacy is a serious issue, and you play a key role in protecting patients' privacy. Don't abuse that trust; there are serious penalties. For approved use, fear not. These controls and regulations exist to *enable* and *protect* you as use the system for its intended purpose.

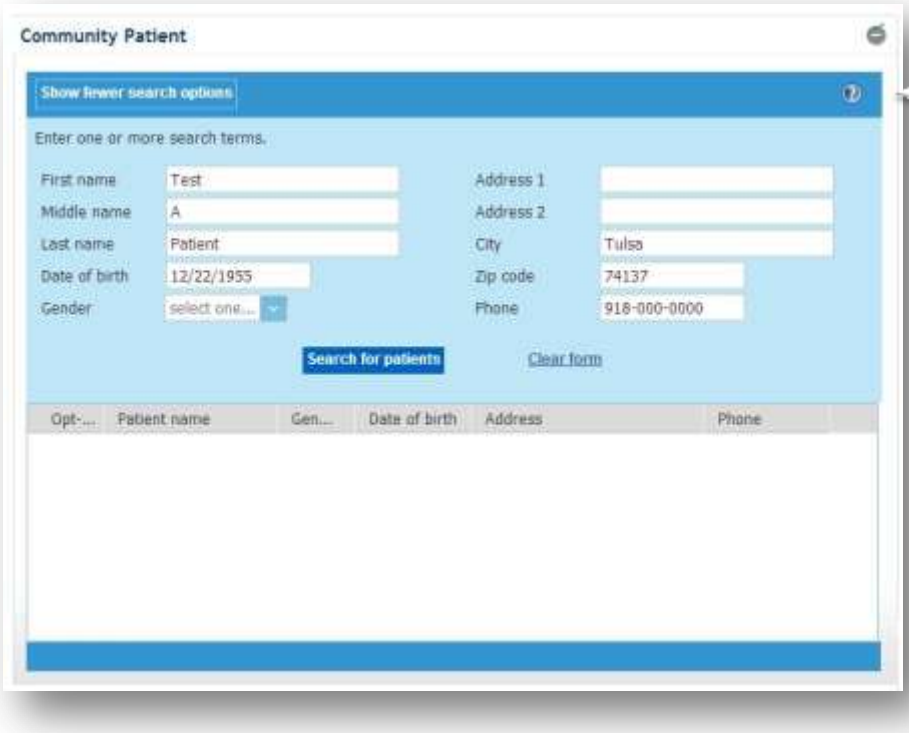
1. Searching for your patient requires, at a minimum, first name, last name and birth date.



2. Select SEARCH FOR PATIENT A list of patients matching the search criteria will appear.



3. To search using additional criteria select the SHOW MORE SEARCH OPTIONS button. Additional criteria includes: Middle name, Gender, Address, City and Phone



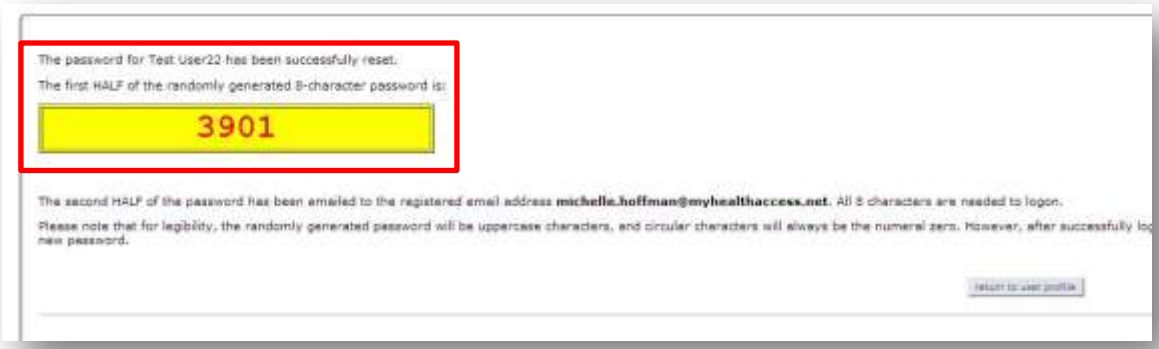
The More Information, The Better Results

Despite MyHealth's best efforts, you might see your patient listed more than once. If you do, each listing represents different records for your patient, and you will need to look at each one to see that entire patient's pertinent information. If this happens, please verify that each record truly does reflect the same person, and (when convenient), contact your administrators and notify them of the situation with adequate identification information, so the records can be found again and matched in the system. Your administrators will relay the information to MyHealth for correction (Note: MyHealth is working to make these problems rare, and if they do occur, easy to report).

Notify your IT staff if duplicate patient records exist.

What If I Forget My Password?

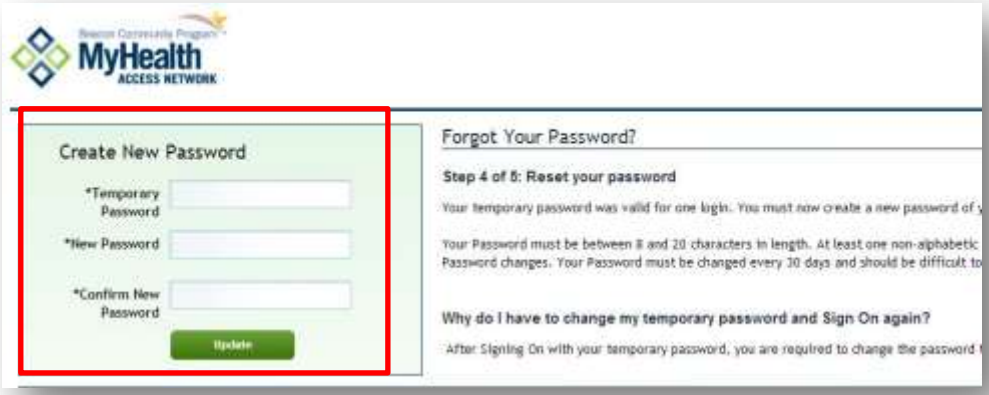
1. On the Log In Page (http://myhealthaccess.net/portal) enter your USER ID and then click on FORGOT YOUR PASSWORD?.
2. Enter your USER ID again and click **Submit**. The Challenge Question screen is displayed.
3. Enter the answer to the Challenge Question
4. Click **Submit**. The first half of your temporary password is displayed on the screen.



5. Write down the four numbers displayed on your screen on a sheet of paper.
6. The remaining four digits of your temporary password are sent to the email address with which you registered. Retrieve the remaining four digits from your email Inbox.

7. Key in your User ID and the eight digit temporary password in the blank password text field.

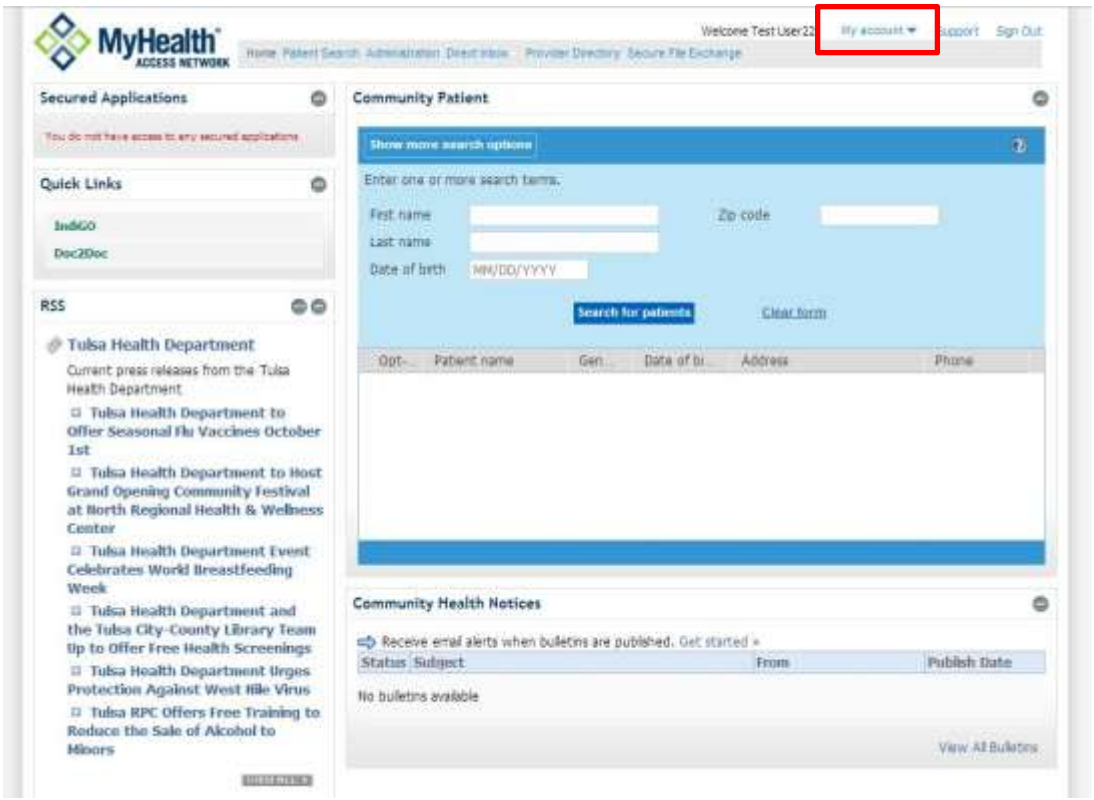
8. Click **Sign On**. You are immediately prompted to change your password.



9. Key in the eight digit temporary password in the Temporary Password open text field.
10. Create a new password, and key it into the New Password open text field. New Passwords must adhere to specific rules, and must be entered twice. Refer to the password rules on your screen if necessary.
11. Click on UPDATE. Your password will have been successfully reset.

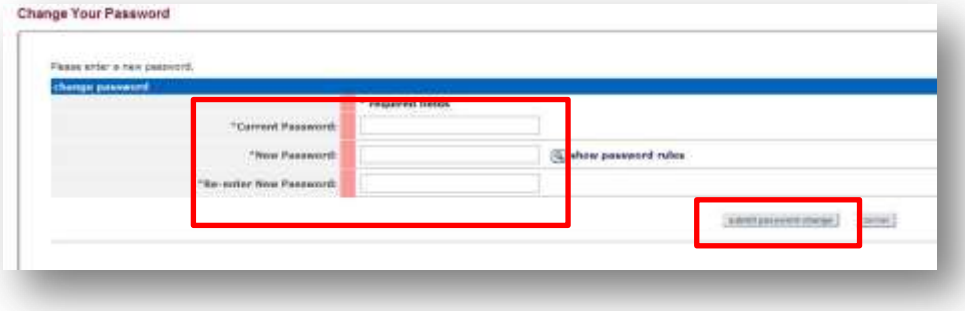
How Do I Change My Password?

1. Point with the mouse arrow at MY ACCOUNT in the upper right-hand corner of the portal home page. Click on MY PROFILE.



2. From the My Profile drop-down menu, click CHANGE PASSWORD.

3. In the CURRENT PASSWORD open text field, enter your current password and then in the NEW PASSWORD fields, enter a new password that adheres to specific rules. Refer to the password rules on your screen if necessary.



4. In the RE-ENTER NEW PASSWORD open text field, k*ey* in the newly created password to verify that you have typed it correctly.
5. Click SUBMIT PASSWORD CHANGE.

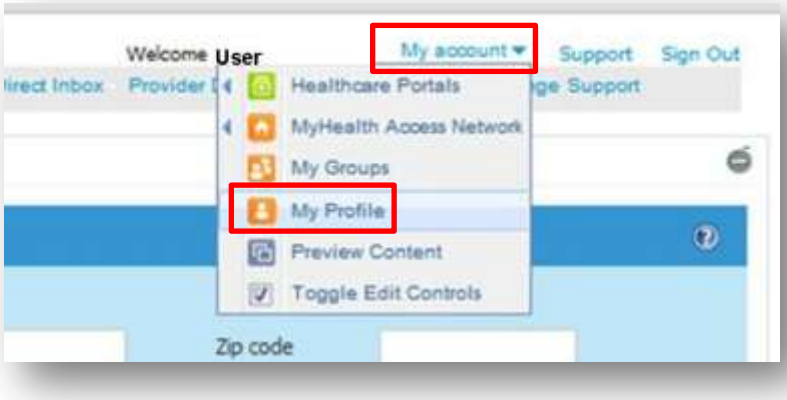
How Do I Unlock My Account?

For System purposes, your user account will become locked if you unsuccessfully attempt to log in three times. If the portal tells you your account has been locked, follow the steps above to RESET YOUR PASSWORD to unlock your account. This will require you to create a new password.

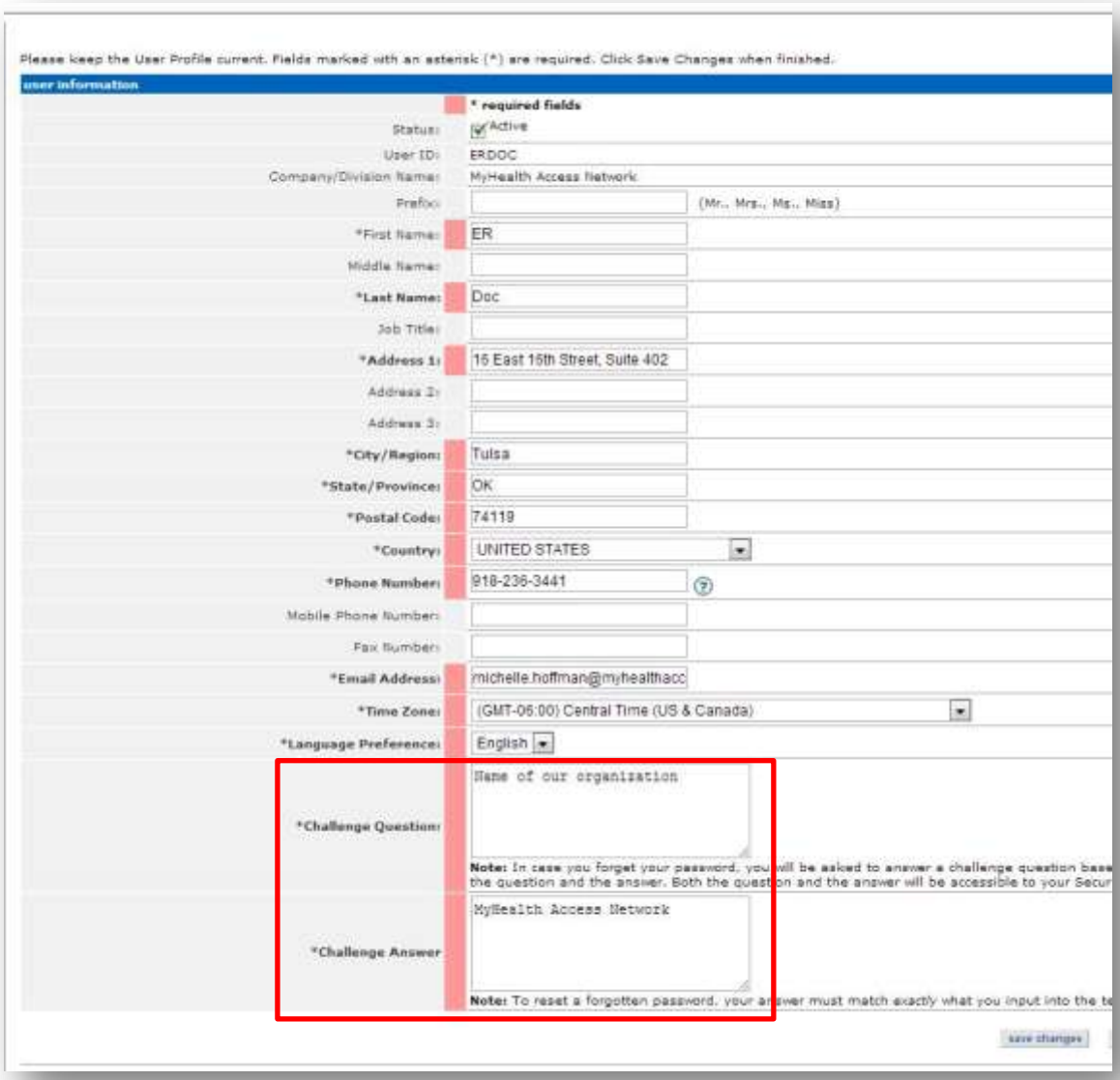
How Do I Edit My Profile?

From time to time you may need to edit your profile; including changes to your name, email, phone, challenge question and answer, etc. To do so, follow these steps:

1. Click on MY ACCOUNT and then on MY PROFILE



2. A screen of options appears. Choose EDIT MY PROFILE
3. Choose EDIT MY PROFILE
4. Locate the Challenge Question and Answer near the bottom of the page. Change your question and answer for added security.



Who Do I Call If I Need Help?

Please contact your organization's IT helpdesk for assistance with the MyHealth portal.

Helpdesk support is provided by your organization's IT staff. If a critical issue occurs your IT staff will work with MyHealth to resolve.

How Do I Talk with Patients About MyHealth?

Your organization should have a patient information sheet that should serve as a starting point for these conversations. Beyond that sheet, you can share that the central purpose of health information exchange is to enable the doctor(s) to immediately access to relevant health information that other providers know, so more factors can be taken into account as treatment recommendations are made. MyHealth is a computer network that takes in information from the medical record systems at many doctors' offices, and it has the same security protections used to keep those record systems secure. MyHealth does not allow the information to be accessed by people who don't already have the ability to access the information today—it helps them be more effective by not having to make phone calls and wait for faxes to do their jobs.

MyHealth takes patient privacy very seriously, and information in the network cannot be used for marketing, or any other purpose that isn't already allowed. MyHealth and all of the people who use it follow HIPAA and other privacy laws, and don't allow anyone access who isn't already able to obtain this information through other means.

If patients do not want their information accessed in MyHealth, they may opt out. Your office has forms and instructions for helping patients do that. If patients opt out, their records are blocked so nobody can access them unless they change their mind at a later point, with the exception of life-threatening emergencies. If patients are concerned about specific doctors seeing their records or have other specific limitations they want to put on their information, then they should be advised to opt out of MyHealth, as MyHealth is currently unable to put specific limitations on specific types of information or certain providers. Other questions about MyHealth's functionality can be addressed to your organization's MyHealth administrators, who may contact MyHealth if needed to address specific questions.

MyHealth Access Network Patient Opt-Out Process

Your organization has a process for informing your patients about involvement with MyHealth, which includes information about opting out, and opting back in. Please recommend patients follow your organization's processes.

Your Organization has a process in place to opt patients out of MyHealth

MyHealth also offers patients the option to opt out on their own. If they prefer to do that, they can obtain the opt-out form from http://myhealthaccess.net/opt-out, sign it with a notary public's witness, and submit the form as indicated on the form. They can also choose to opt themselves back in with forms found at the same location.

More details about the effect of the opt-out process are addressed in MyHealth's patient opt-out policy, P04, available at http://myhealthaccess.net/policies .

MyHealth Privacy & Security Design

The MyHealth Privacy & Security design captures the patient protection philosophy of our community stakeholders to preserve the availability, confidentiality and integrity of individuals' protected health information (PHI). The procedures and common terms and conditions provide a solid legal framework.

Key MyHealth Privacy & Security Components

MyHealth data is protected by best practices in health information technology. Data is encrypted at all stages, using the security industry's highest standards (FIPS 140-2) to protect information from outside attacks. Key components include:

1. Data delivered securely
2. Data is encrypted and stored securely with many network controls
3. Data is regularly backed up and stored securely
4. In case of major problems, secondary production machines (in a separate location) are reserved and can be quickly brought online
5. Data facilities have restricted access and extensive security controls
6. Data access is highly restricted, tracked, audited and monitored
7. Authorized User accounts are only given to MyHealth member organizations

The policy was designed by a committee of privacy officers, security professionals and lawyers from MyHealth's founding organizations, both large and small. MyHealth is compliant with the relevant components of the Health Information Protection and Accountability Act (HIPAA) and the Health Information Technology for Economic and Clinical Health Act (HITECH). These regulations allow appropriate disclosure of PHI to individuals whose jobs require this access, who have a direct patient relationship, for purposes of treatment, payment or operations.

Privacy & Security: *Good Rules of Thumb*

Protecting patient health information is everyone's job. Follow these rules of thumb to do your part in protecting patient health information

- Don't share your log on information and password
- Only seek information about your patients
- Follow HIPAA and your organizations own policies
- Help identify and communicate discrepancies of information to your MyHealth administrator
- Protect sensitive information

How Does Your Organization Participate in MyHealth?

1: Data Users Only

The easiest and fastest connection to MyHealth is as a Data User. Data Users utilize the web-based portal to view information.

Organizations choosing to have data access only can implement MyHealth in less than one day. A Data User implementation would require the following:

- Registering your Users
- MyHealth portal training (less than one hour)
- Enhancing workflow modifications
- On-going support

2: Data Supplier

Becoming a Data Supplier requires time and resource effort. Data Supplier implementation includes:

- Confirming electronic medical record (EMR) compatibility
- Establishing connectivity to MyHealth
- Loading demographic data into the master patient index (MPI)
- Loading clinical data into the clinical data repository

Beacon Community Program
MyHealth
ACCESS NETWORK

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