CLINICIAN USER GUIDE

GEORGIA HEALTH INFORMATION NETWORK

Unify™ Data Management Platform 2012/2013

April 2014
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INTRODUCTION

The purpose of this document is to provide clinical users with a basic guide to essential information necessary for navigating patient data within the clinical portal. The clinical portal organizes longitudinal patient data into episodes of care. Depending on available data from participating providers, users are able to view all of a patient’s clinic visits, hospitalizations, labs, reports, and medications.
ACCOUNT ACTIVATION

New users will receive an email similar to the one below with a link to set up security questions and choose a password. Click on the link to begin account activation.

Choose a password. Click the arrow beside What makes a strong password? to view the requirements for your system. Enter your password and confirm, then click Submit.
After your new password is accepted, you will see a confirmation screen. Make note of your user name before proceeding (the user name is “gburns” in the example below). Select Click here to login.

Activate Account for User gburns

Your account has been successfully activated! Click here to login.

You will be taken to the login screen. Enter your username and password and click the Login button.

Login to Unify™ Data Management Platform 2012/2013

User Name
Password
Login
Forgot your password?
If you attempt login using the incorrect password too many times, your account will become locked out. Locked accounts will become unlocked after a certain amount of time. If you are having difficulties logging into your account, click the **Forgot your password?** link, or contact your system administrator.

Follow the directions to add at least three security questions. You may edit these later by clicking **My Profile** at the top right of any page.

![Security Questions](image)

After adding your third security question, you will be redirected to the Census Screen.
SEARCHING FOR PATIENTS

Census

After logging in, you will be presented with the Census screen, from which you can search for a patient using the listed criteria. Any fields that are required to complete a search will be marked on this screen appropriately.

Patients matching the search criteria will appear in a list to the right of the search box. Results can be sorted by Last Name, First Name, or DOB (date of birth).

Click anywhere on the row with the patient’s name to access the Patient Summary, or right-click and choose from the menu. Clicking a tab option will take you directly to the tab for that patient.
Patients previously viewed and saved are accessible by selecting My Census from the My Census Definitions dropdown box. To add a patient to the My Census menu, right-click on them in the manual search results, and choose Add to My Census.

Opted-Out Patients

By default, the HIE will be setup to follow an opt-out consent model: all information not specially protected by federal or state laws is shareable under HIPAA TPO provisions and will be shared unless a patient explicitly elects to opt out of the system.

If a patient has elected to opt out, the clinical portal and query functions will follow a zero disclosure policy. Therefore, a search for a patient who has opted out will return the message “No patients matched the search criteria”, as shown below.
Sensitive Health Information

Sensitive Health Information (SHI) may not be exchanged by the HIE among its connected providers or shown to users of the clinical portal unless the user meets the criteria for assignment of a role for accessing this information. Examples include encounters from a state mental health institution, a substance abuse program, or psychotherapy session notes. Therefore, all information for an encounter will be suppressed from data-based exchange, and will be suppressed from view in the clinical portal, unless the credentials of the user allow for access to SHI.

VIP Patients

VIP patients present as regular patients, but when their records are selected from the census, a window will appear to notify the user with an additional “break the glass” warning. Clicking any of the buttons will trigger an audit log entry of the appropriate type.

Patient Banner

The Patient Banner contains basic patient information, summary views, and detailed administrative and clinical data. The patient’s name, age/gender, DOB, MRN, and allergies (if available) are listed at the top of the page. Clicking the arrow beside the patient’s name collapses/expands the header information.
Summary

After selecting a patient from the census, his or her data is opened in the Summary tab. It provides a longitudinal view of a patient’s problems, providers, procedures, and medications across clinical encounters.

Timeline

A timeline representing the entire time period for which the patient’s data is available within the HIE is found at the top of the screen below the tabs.
By default, the top row of the timeline begins with the patient’s first available encounter and continues to the present date. However, to improve performance, only the most recent 24 months of data will be displayed in the summary when the page loads. Any history prior to the default time period is represented by the faded portion of the colored line.

The bottom row of the timeline is an expanded representation of the same time period. Dragging the edges of the date range on the top row increases or decreases the visible date range of the summary.

**Customizing the Summary**

Each user may customize the order and content displayed on the Summary tab. Checking/unchecked the box beside each section title will display or suppress that section.

Change the order of display by using the up/down arrows beside the section title.

**Detailed Information**

Each data point within problems, providers, and procedures is represented on the longitudinal summary by one of the following icons to indicate the type of encounter for each. Medications and Immunizations are represented by a capsule or syringe icon.
Position your cursor over an icon to view additional detail for any encounter, medication or Immunization. A box will appear displaying more detailed information.

**Problems**

Problems are organized by system with the label displayed to the right of the screen.

**Medications**

Medications are organized by Date by default, with most recent prescribed at the top. Inpatient and outpatient meds are available.
Place your cursor over the meds icon to view detailed information.

Selecting order by **Class/Name** will group medications in order of drug name and drug class. Drug class appears to the right of the grouped medication names.

**Patient Dashboard**

The **Patient Dashboard** tab offers providers a high-level view of a patient’s clinical picture in an easy-to-read, comprehensive view. **Problems, Encounters, Medications, Reports, Lab Results, Providers, Immunizations,** and **Allergies** are included by default. Items displayed can be configured to match individual user preferences.
To change the date range, click on the dates displayed. Then, select from the standard options or manually define a date range using the calendars. Finally, click the Update button.

Once a date range is established, each panel will display data bounded by the dates chosen.

**Patient Dashboard Appearance**

The size of the rows in each panel can be increased or decreased by clicking on the small double-arrow button in the upper right.
Each individual panel can be reloaded, expanded, searched or printed using the icons in the lower left.

The dashboard panels can be customized by clicking the **Organize** button at the upper right of the screen. Once clicked, the **Panel Options** and **Layout** interfaces will be displayed.
In the Panel Options screen, a list of panel titles will be presented. To add a new panel to the dashboard, click the Add Panel button and select a panel type from the dropdown menu. To delete a panel from the dashboard, click on the appropriate panel title box and click the Remove Selected Panel button.

To edit a panel, click on the panel’s title to expand it:

![Panel Options Screen](image)

Here, many of the panel’s properties can be changed:

- The panel name can be changed in the Panel Name text box.
- The properties of each column (including name, width, and whether the data displayed is in summary or extended format) can be adjusted.
- Column order can be changed by clicking and dragging the column name bar to the desired location.
• Columns can be added by clicking the Add Column button. Columns can be removed by clicking the X at the far right of the column name bar.

• Panel data can be ordered using a specified column in ascending or descending order by selecting options from the Sort By dropdown menu.

• Clicking the Show Filter Toolbar checkbox will add a toolbar at the top of the selected panel. Typing values into the filter row will select only data that matches that criteria.

The Layout interface allows the dashboard panels to be rearranged and resized. Click and drag a window to change its location on the dashboard. Click and drag on the lower right corner of a panel to resize it.

The panels may be positioned such that they will overlap each other in the dashboard. To ensure any changes to the layout have not resulted in overlapping panels, click the Check Overlap button. A window will appear if no panel overlaps are present.
When changes to the dashboard panels and layout are complete, click the Save button at the bottom of the page. Click Restore to Default Preferences to reset any changes. To return to the Patient Dashboard, click Done.

Lab Results Panel

The Lab Results panel incorporates a few additional features not found in other panels:

- Hovering over values will display additional information based on the column:
  - The Value column will display the units for the lab result value.
  - The Acuity column will display the normal value range for a lab result.
  - The Trend column has two components:
    - A short trend line, which will display the individual data point values on the trend line when hovered over.
    - Trend values, which will display the most recent values for the lab result followed by the value range when hovered over.

Clicking on a line of data in the Lab Results panel will take you directly to that result in the Lab Reports tab.
Reports Panel

Clicking on a line of data in the Reports panel will take you directly to that result in the Reports tab.

<table>
<thead>
<tr>
<th>Date</th>
<th>Note Type</th>
<th>Provider</th>
</tr>
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<tbody>
<tr>
<td>04/02/2014</td>
<td>pdf</td>
<td>pdf Testing_PDF_Up...</td>
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<td>04/02/2014</td>
<td>pdf</td>
<td>pdf OPTOUTDemos...</td>
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<tr>
<td>11/06/2013</td>
<td>Diagnostic X.</td>
<td></td>
</tr>
<tr>
<td>11/06/2013</td>
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</tr>
<tr>
<td>11/04/2013</td>
<td>Diagnostic X.</td>
<td></td>
</tr>
<tr>
<td>11/02/2013</td>
<td>Operative</td>
<td></td>
</tr>
</tbody>
</table>

Reports

The Reports tab includes all available text-based reports, such as: H&P’s, consults, ED notes, office visits, operative notes, radiology reports, imaging studies, and miscellaneous correspondence regarding the patient.

**Operative**

- **Dictated by:** Jack Blue, MD
- **Dictated:** 11/28/2006 8:03 P 000087489
- **Transcribed:** 11/29/2006 1:06 A 1:06 D

**Patient Name:** Demoski, HELEN
**Health Record No.:** 123456783
**Billing No.:** 88888888
**Room No.:** SIC
**Date of Procedure:** 11/28/06

**Operative Note**

- **Dictated by:** Jack Blue, MD
- **Dictated:** 11/28/2006 8:03 P 000087489
- **Transcribed:** 11/29/2006 1:06 A 1:06 D

**Patient Name:** Demoski, HELEN
**Health Record No.:** 123456783
**Billing No.:** 88888888
**Room No.:** SIC
**Date of Procedure:** 11/28/06

**Preoperative Diagnoses:** Aortic stenosis and mitral insufficiency

**Postoperative Diagnoses:** Aortic stenosis and mitral insufficiency

**Procedure Performed:** Aortic valve replacement with a 21 mm Edwards Magna bovine pericardial bioprosthesis and a saphenous vein graft to the right coronary.
Reports are divided by category. Each category can be expanded by clicking the (+) next to the category name. Within categories, reports are shown in order by date with the most recent report shown first. To search for a report use the Report Title Search Bar. If you prefer to view reports in chronological order rather than by category, click **Year** above the list of reports on the left.

To display the text of the report, click the title. The contents will be displayed to the right of the list.

**Labs**

The **Labs** tab is useful in viewing the trend of a condition over time. It is configured in descending timeline order with one result displayed per column, by default. The display may be configured by result type and time.

Enter the date into the **Date** box at the top of the screen, or use the calendar to search for results on a specific date. The directional buttons in the top left- and right-hand corners allow you to scroll through the columns of results.

Red tick marks along the top of the timeline represent lab results. Gray shading represents the time period for the columns displayed on screen.
Placing the cursor over a result will display additional details, including any additional values which fall between the min and max values.

For a printable view of the results displayed, click the **Switch to Print View** link in the upper right-hand of the screen. To print, right click anywhere on the screen and use the browser’s print screen capability. To switch back, click **Leave Print View**.

**Hierarchy Options**

The *Hierarchy Options* section allows users to customize the sequence and grouping of the *Labs* display.

- Select a display hierarchy from the *Select Hierarchy* dropdown box.

- Once selected, a hierarchy can be deleted by clicking **Delete Selected Hierarchy**. Click **Add New Hierarchy** to create your own configuration.

- Checking the *Report-based* box organizes labs as they were ordered/resulted (i.e. in a Report form), not by the selected hierarchy. For example, checking this box groups related analytes, such as Hemoglobin, Hematocrit, and WBCs together. If unchecked, the labs will appear per the hierarchy options.

- **Time compression** may be set to daily, weekly, monthly, quarterly, or yearly. Greater time compression (e.g. quarterly or yearly) might be more helpful in tracking the progression of a disease of longer periods of time, while a lesser time compression (daily or weekly) would be more appropriate when viewing results from an acute episode or single encounter. Note: If a specific lab result exists more than once during the selected time compression, the row will show the min and max values of that lab result during that time period.

- **Timeline Order** can be set as ascending or descending from left to right.
Page Actions and Panel Shortcuts

Page Actions allow users to customize their current view of Labs. Panel Shortcuts facilitate navigation.

- **Checking Display Most Recent Column** inserts a column with the most recent result of each lab panel currently displayed to the left of all columns.

- **Organize All Panels** allows drag-and-drop organization of the lab panels. For example, after checking this box, you can grab the CBC Basic panel with your mouse and move it to a lower position.

- Graphing lab results is possible by checking at least one box for a panel or the individual items within a panel and then clicking the **Graph Checked Row Lab Data** button.

- **Filter Result Rows** allows users to filter by a search term, such as “blood.” After searching for this term, only results with “blood” in the name of the lab will be displayed. After viewing the filtered results, click on the **Remove Filter** button that is displayed above the first lab panel.

- Clicking on any of the **Panel Shortcuts** in the lower left-hand corner of the page will take you directly to the desired panel, instead of scrolling through the panels displayed above it.