

## Care360™ Physician Portal QuickStart Guide Sending Results to a Patient Health Record

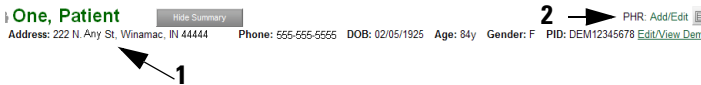
In order for Care360 Physician Portal to send lab results to a patient health record, the participating physician must provide the patient with a *Health Record PIN*. The following information explains how to generate a *Health Record PIN* and how to send lab results to a patient health record.

### Overview

In order to send lab results to your patient's health record, you must do both of the following:

- ❑ **Provide the patient with a PIN.** In order to activate the service and send the patient's lab results to their personal health record, you must generate a *Health Record PIN* for each patient who wants to participate. When the PIN is created, you can queue lab results for the patient. Once the patient uses the PIN to complete the link between their health record and Care360 Physician Portal, the queued results are sent to their personal health record.
- ❑ **Send results to a patient's health record.** After reviewing patient results, you can select specific results (*Final* or *Corrected*), or a type of result (such as normal and/or abnormal) to send to the patient's health account where they can view and save the results.

### Generating a Health Record PIN



#### To Generate a Health Record PIN

1. Access the patient *Summary* of the patient for whom you want to generate a *Health Record PIN*.
2. Click **Add/Edit** link next to *PHR (Personal Health Record)* to the right of the patient identification.

**Tip:** In addition to the patient *Summary*, the *Add/Edit* option for the *PHR* is also available on every page where there is patient context (when the demographic bar displays).

3. Click the appropriate link in the *Patient Portal Links* area to generate the *Health Record PIN*.
4. When the *Health Record PIN* letter displays, click **Print** to print a copy of the letter to hand to the patient.

**Note:** The patient's identity should be verified before you provide them with the generated PIN information. The *Health Record PIN* letter should be handed directly to the patient.

#### What happens next?

After handing the *Health Record PIN* letter to the patient, the patient then needs to access the registration page that is listed on the letter and type their PIN to authorize you to send results to their health record.

The patient must register within two weeks before the PIN expires. If the patient's PIN does expire, you can access their patient *Summary*, delete the existing record from the *Patient Portal Links* table, and then create a new record (using the

*Add/Edit* option for the *PHR*) which will generate a new PIN (and print another *Health Record PIN* letter). All queued results are not affected by generating a new PIN for the patient.

If for some reason you need to reprint the *Health Record PIN* letter for a patient before the original PIN expires, the reprinted letter will contain the same PIN expiration date as the original letter. A new PIN expiration date will only be generated if the original PIN is deleted.

Notice that the *Patient Portal Links* table displays the patient's status as *Requested*. Once the patient has registered, their status changes to *Established*.

Patient Portal Links				
Vendor	Status	PIN	Modified Date	Actions
Other PHRs	Established	QGET-BZPX-JDYK-92HR	2009-01-22	Print PIN Letter / Delete
Google Health	Requested	HSGJ-AGHX-BXQX-WZQA	2009-03-29	Print PIN Letter / Delete

**Note:** When the status on the *Patient Portal Links* table shows *Requested*, the option to send lab results to the patient is enabled. All results sent during this time are queued until the patient finishes the registration process. Once this is complete and the status changes to *Established*, all queued lab results are sent to the patient's health record.

### Delete a Health Record PIN

Patient Portal Links				
Vendor	Status	PIN	Modified Date	Actions
Other PHRs	Established	QGET-BZPX-JDYK-92HR	2009-01-22	Print PIN Letter / Delete
Google Health	Requested	HSGJ-AGHX-BXQX-WZQA	2009-03-29	Print PIN Letter / Delete

#### To Delete a Health Record PIN

1. Access the patient *Summary* for the patient for whom you want to delete a *Health Record PIN*.
2. Click **Add/Edit** link next to *PHR (Personal Health Record)* to the right of the patient identification.
3. In the *Patient Portal Links* table, locate the appropriate *Vendor*, (for example, Google Health™), and then click *Delete* in the *Actions* column.

The patient's *Health Record PIN* is deleted from the system and results can no longer be sent to the patient's health record (the *Send to PHR* icon is no longer available). In order to re-establish the service, you must create a new PIN for the patient, and the patient would need to re-register using the new PIN.

### Send Results to a Patient's Health Record

Patient Portal Links				
Vendor	Status	PIN	Modified Date	Actions
Other PHRs	Established	QGET-BZPX-JDYK-92HR	2009-01-22	Print PIN Letter / Delete
Google Health	Requested	HSGJ-AGHX-BXQX-WZQA	2009-03-29	Print PIN Letter / Delete

#### To Send Results to a Patient's Health Account


1. Verify that the patient is registered to accept results by accessing the patient's *Summary* and verifying that their status in the *Patient Portal Links* table is *Established* for the appropriate *Vendor* (for example, Google Health).

**Tip:** If a health account name displays to the right of the *PHR* icon in the patient demographic bar (in addition to the *Add/Edit* link), then the patient has successfully registered (or *Established*) their health record.

If the patient's status is *Requested*, you can queue results that will be sent when the patient finishes the registration process. You can contact the patient and remind them to register their *Health Record PIN* so that you can begin sending results to their health record.

2. Do one of the following to send results to the patient's health record:
  - Locate and send individual results.
  - To make changes to the organization auto-forward policy, continue with step 6.
  - To send bulk results, continue with step 7.

**Note:** Only *Final* and *Corrected* results can be sent.


3. Click  **Send To PHR** at the top of the result to send the selected result to the patient's health account.
4. At *Notes*, type the information that you want to send along with the test result data to the patient.

The *Notes* display before the result data when the patient views the message through their health record.




**Note:** The *Notes* (up to a maximum of 2000 characters) are stored in the *PHR Sent Log*.

5. Click  to send the results to the patient.  
The next time that the patient logs into their health record, the lab result will be available for review.
- Tip:** If the *Send to PHR* icon is not available, then either the *Health Record PIN* letter has not been given to the patient (the patient's status is not yet *Requested*), or the result that you are viewing is a partial result.
6. To specify a patient-level auto-forward policy (which overrides the organization-level auto-forward policy), do the following:

- a. Navigate to the patient *Summary* if you are not already there, and then click  link next to *PHR (Personal Health Record)* to the right of the patient identification.
- b. At *PHR Lab Result Auto-Forward Policy*, click the *Use Organization Policy* check box (which is set by default) to clear its selection.
- c. Specify the results that you want to send:
  - Select the *Forward Normal Results* check box to automatically send incoming results that are normal (with an *Order Status* of *Final* and/or *Corrected*).
  - Select the *Forward Abnormal Results* check box to automatically send incoming results that are marked abnormal (  ) (with an *Order Status* of *Final* and/or *Corrected*).

**Note:** You cannot select abnormal only as your results forward policy. You must select both normal and abnormal results in order to include abnormal results.

- d. At *Delay Hours*, type the number of hours that you want to delay the results release from the time that they are received (you may want to review the results before you forward them).
- e. Click .

7. To send bulk results to the patient's health account, do the following:
  - a. At *Bulk Send Lab Results to PHR*, type the number of months (prior to the current month) that you want to send lab results.
  - b. Specify the results that you want to send in bulk:
    - Select the *Send Normal Results* check box to bulk send results that are normal (with an *Order Status* of *Final* and/or *Corrected*).
    - Select the *Send Abnormal Results* check box to bulk send results that are marked abnormal (  ) (with an *Order Status* of *Final* and/or *Corrected*) will be sent to the patient health accounts.
  - c. Click *Send Now*.

**Tip:** You can verify that the results were sent to the patient's health account by viewing the *PHR Sent Log* (see below).

## Viewing the PHR Sent Log for a Lab Result



### View the PHR Sent Log

1. Access the patient *Summary* of the patient for whom you want to view the *PHR Sent Log*.
2. Select the result you want to verify was sent to the patient's health record.
3. Click the *PHR Sent Log* tab to view the information.

**Tip:** If the *PHR Sent Log* displays *Error* after the date and time, the result was not delivered to the patient's health record. Follow the steps in the *Send Results to a Patient's Health Record* section to re-send the result to the patient.

**For assistance, contact the Help Desk at 602.685.5465, or toll-free at 800.766.6721, ext. 5465.**