

SYNCRONYS HIE CLINICAL PORTAL TRAINING

OVERVIEW AND FIRST TIME LOGIN  
ALL HIE CLINICAL PORTAL USERS



NEW MEXICO'S HEALTH INFORMATION EXCHANGE



This brief module introduces SYNCRONYS to new users and assists new users with their initial log in to the HIE clinical portal. If your organization has configured single-sign-on from your electronic medical record system, you can skip this module.

## WHAT IS SYNCRONYS?



- The nonprofit, statewide, health information exchange (HIE) for New Mexico.
- SYNCRONYS enables the electronic exchange of patient health information among different and unrelated healthcare organizations to provide timely access to a patient's information in one centralized record.
- Its objective is to exchange essential patient information between New Mexico's hospitals, tribal/IHS hospitals/clinics, skilled nursing facilities, long term care, home health and hospice, independent clinics, and behavioral health clinicians.



SYNCRONYS is New Mexico's Health Information Exchange. An HIE enables the electronic exchange of patient health information among different and unrelated healthcare organizations to provide timely access to a patient's information in one centralized record. We strive to help New Mexico meet the US Core Dataset for Interoperability goals, and we are working with many types of healthcare providers and payers to obtain that data.

ENHANCING THE HIE HAS BROUGHT  
TOGETHER INNOVATORS . . .



. . . TO TRANSFORM LIVES & DELIVER HIGH QUALITY  
SOLUTIONS FOR HEALTHCARE IN NEW MEXICO



With funding from the New Mexico Human Services Department and the Centers for Medicare & Medicaid Services, SYNCRONYS has come together with these vendors and partners to enhance New Mexico's HIE. Together, we offer New Mexico many tools to help improve patient care in our state.

## WHAT IS SYNCRONYS?



Visit our website for descriptions of the many solutions we offer!

[www.syncronys.org](http://www.syncronys.org)



Together partners in SYNCRONYS bring a wide variety of solutions for healthcare, from providing information at the point of care to sending notifications of events that require patient follow up, to data analytics and population health tools. Visit our website for details on these and more of our solutions.

SYNCRONYS HIE CLINICAL PORTAL TRAINING

ALL CLINICAL PORTAL USERS



FIRST TIME LOG IN



You are in this training session because you have been authorized by your company to access the SYNCRONYS clinical portal. This lesson is intended for all portal users. You will need a username and temporary password, so if you have not received one, please speak with your supervisor.

## USER ID / USERNAME

- You can only log into the SYNCRONYS HIE if you have been given an authorized user account.
- Your organization's Privacy Officer will determine the appropriate access level for your job.
- Your username has a 3 or 4-character prefix that identifies your organization, e.g., "ABC-Jjones"
- If you don't have a user ID and temporary password, ask your supervisor to request one, just as they would for access to your other secure systems.



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## LOG IN SCREEN – <https://synchronys.orionhealthcloud.com>



Please enter your user ID and password

User ID

Password

[Forgot your password?](#)

[Login](#)

 **Amadeus Production Environment**

Planned Maintenance - 11-2-22 from 7pm MST to 11pm MST

POWERED BY 



Tip: Create a shortcut or bookmark the site as a favorite



The SYNCRONYS clinical portal is cloud based, so unless your organization has configured entry from your electronic medical record system you can access the portal from virtually anywhere using your favorite browser and this URL to find the login screen. You'll notice that there is a forgotten password link on this screen, and any major maintenance announcements will be displayed here. Locate the login screen and create a shortcut to make it easy to find the next time you log in.

## PASSWORD REQUIREMENTS



- Use at least 10 characters
- Include upper- and lower-case letters
- Include numbers
- Include special characters
- Do not re-use passwords
- Do not use passwords from another site or something too obvious such as your user ID, first or last name

*Tip: Do not use copy/paste to enter your temporary password.*



The password you choose today is good for the next 90 days, unless you decide to change it sooner. Multi-factor authentication is coming soon to make the SYNCRONYS HIE even more secure, but for now your username and a strong password that you change every 3 months are what is required.

Your temporary password will expire immediately when you use it the first time. You will be asked to enter it again as your "Old Password" when you select a new one. If you have been given a complex temporary password, type it in carefully, rather than using a copy and paste operation that can include an extra blank character at the end.

Use at least 10 characters, and include upper- and lower-case letters, numbers, and special characters for a strong password.

To ensure your account is secure, do not re-use old passwords, or use the same password you have for other systems. Refrain from using words, years, or passwords that others might easily guess.

# DISCLAIMER

Accept this disclaimer to continue

 If you do not accept this disclaimer within five minutes, you will be logged out and returned to the login page.

By accessing information using the SYNCRONYS Health Information Exchange, I understand, accept, and agree that my access to and the use and disclosure of such information by me is subject to Federal and State laws and contractual duties and obligations.



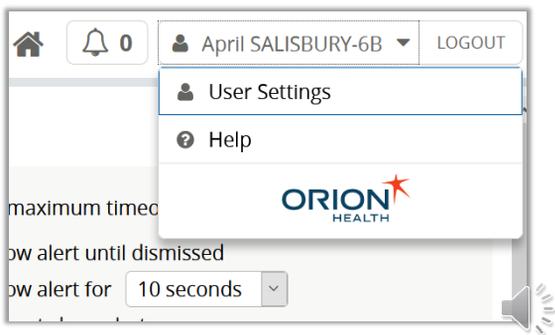
Each time you log in, you will see this disclaimer. The disclaimer reminds all users to take seriously the responsibility of keeping patient information private. Unless you have a HIPAA compliant reason to view the patient's record, that is, Treatment, Payment, or Healthcare Operations, you should not use this tool to view that patient's information. Privacy Officers have the ability to audit the use of the HIE by their employees.



## HOME SCREEN



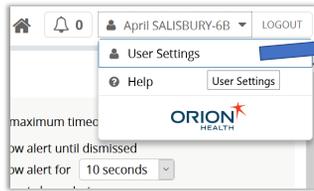
- All home screens have a Home icon, Portal Message indicator, a dropdown menu with Help and User Settings, and a Logout button.
- Your home screen configuration depends upon the role the user account has been assigned.
- Demographic-only users, Privacy Officers, and Clinical users will have patient search tools.
- End User Administrators will be able to search for users.



Depending on the access role you have been assigned, your home screen will look different from that seen by another type of user. If your roles involves looking up even basic patient information, you will have patient search tools. If you are an end user administrator, usually help desk staff member, you will be able to search for users instead of patients.

However, all home screens have some things in common. You have a house-shaped icon to take you to your home screen. You have access to portal messaging, and therefore have a portal mail indicator, shaped like a bell. All users will see their name with a drop-down menu to User Settings, or preferences screen, and context-sensitive help resources. And of course, everyone has a Logout button. Logout should always be used instead of closing your browser.

## COMPLETE YOUR USER ACCOUNT SETUP

A screenshot of the 'Provider Homepage' user settings form. The form is titled 'Provider Homepage' and has a search icon next to the text 'Worklist to show on My Homepage'. Below this, there is a section titled 'Tenant\_NMHC' with three input fields: 'Mobile Phone Number', 'Office Phone Number', and 'Secret Words'. At the bottom, there is a section titled 'User Attributes' with one input field for 'Job Title'.

The first time you log in, please visit your [User Settings \(My Details\)](#) screen:

- Users who can search for patients may choose a worklist to display on their home screen.
- Fill in or verify your phone numbers and job title.
- Enter a “Secret Word” that will help verify your identity in the event you need to call the SYNCRONYS help desk.



Once you have logged in, chosen a strong password, set up a security challenge question, there are a couple more steps to finish setting up your account. Please go to the User Settings, or preferences, screen and scroll down to the Tenant\_NMHC section. Make sure that there are two valid phone numbers. These would be used to verify your identity if you need to contact the SYNCRONYS help desk.

Also, please type in a “secret word” that would confirm your identity if there were any question about who was asking for assistance with your account.

## SET PREFERENCES – MY DETAILS

- If you don't care for the default home screen, you can choose another Start Screen. →
- If you frequently search for patients by medical record number, select your preferred patient organization to save time when searching. →

### My Details

Username **SYNC-asalis**  
Change Password

Start Screen [Dropdown Menu]

Roles I perform  
----- Patients ----- er  
Recent Patients  
Patient Search  
Patient Creation  
----- Worklists -----

Patient Search and Demographics

My preferred patient organization [Dropdown Menu]



There are some other configurable items on the preferences screen that you can set if you like. You can choose a different home screen if you don't like the default home screen. Sometimes clinical users like to temporarily change to Patient Search until they have built up a list of recent patients, and then change back, because the default home screen is helpful.

If you frequently search for patients by medical record number, you can select the preferred patient organization to save time when searching by that health system's medical record number. This is especially useful if your organization is sharing patient information with the HIE, because your own medical record numbers would be searchable.

## RESOURCES – WWW.SYNCRONYS.ORG



Before we move on, I want to point out some of the resources we share on our public facing website, [synchronys.org](http://synchronys.org)

Under Onboarding, Training Needs, you will find a library of videos and handouts in manageable sized lessons.

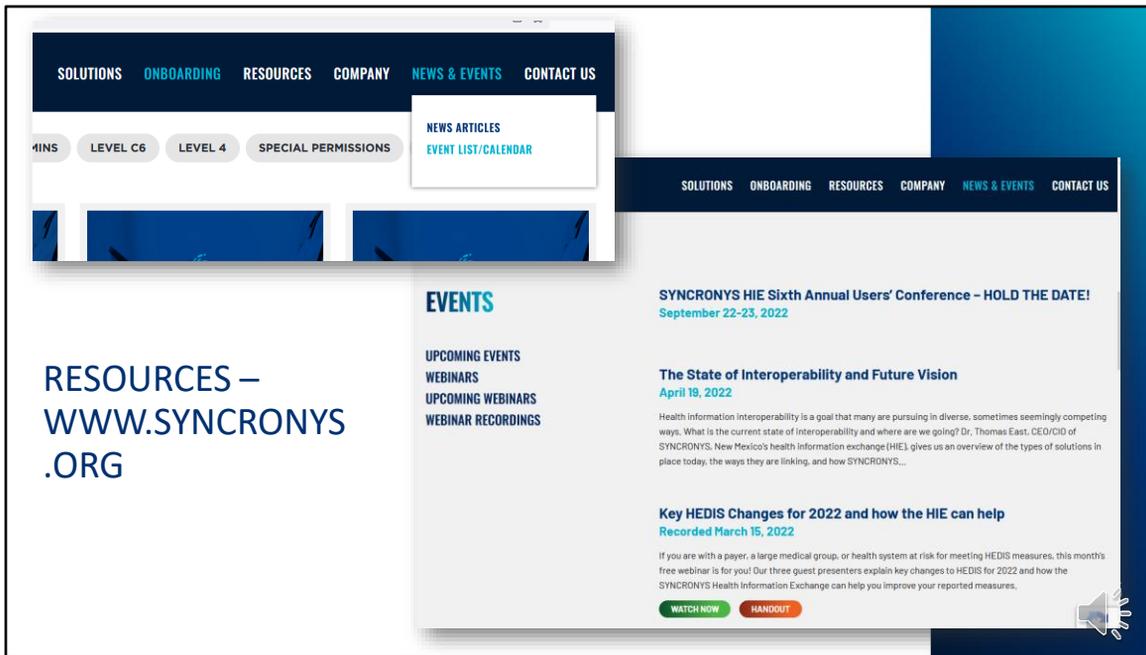
## RESOURCES – WWW.SYNCRONYS.ORG

The screenshot displays the Synchrony website's resources page. At the top, there is a navigation bar with the Synchrony logo and menu items: SOLUTIONS, ONBOARDING, RESOURCES, COMPANY, NEWS & EVENTS, and CONTACT US. Below the navigation bar, a series of filter buttons are visible: ALL, CLINICAL USERS (highlighted), PRIVACY OFFICERS, END USER ADMINS, LEVEL C6, LEVEL 4, SPECIAL PERMISSIONS, and DIRECT MESSAGING USERS. The main content area features a grid of eight training modules, each with a video thumbnail and a description. The modules include:

- (4:30 MIN.) Tips for Viewing Multiple Records for the Same Patient** (PATIENT CONSENT BASICS FOR PRIVACY OFFICERS)
- (10:39) Image Exchange** (IMAGE EXCHANGE)
- (34 MIN.) Advance Care Planning Tool** (PATIENT CONSENT BASICS FOR PRIVACY OFFICERS)
- (9:45 MIN.) User Administration 5b - Creating New User Accounts** (PATIENT CONSENT BASICS FOR PRIVACY OFFICERS)
- (8:03 MIN.) User Administration 5a - Creating Existing Users** (PATIENT CONSENT BASICS FOR PRIVACY OFFICERS)
- Communicate Direct - Connect Message Alerts** (COMMUNICATE DIRECT SECURE MESSAGING (DSM) FOR END USERS)
- Communicate Direct - Connect Message Alerts** (COMMUNICATE DIRECT SECURE MESSAGING (DSM) FOR ADMINISTRATORS)
- (10:19 MIN.) Orientation to Synchrony** (PATIENT CONSENT BASICS FOR PRIVACY OFFICERS)

Each module card includes a 'WATCH' button and a 'PRESENTATION HANDOUT' button.

Use the filters above the modules to hide the lessons that do not pertain to your role. The length of time it takes to view the video appears in the description.



We realize that not everyone can join us for our monthly customer webinars, but you can still listen to them at your convenience by visiting the News & Events section and looking at our webinar recordings for topics that may interest you. Upcoming live events will be posted here as well.

### Who is participating?

https://www.synchronys.org

SOLUTIONS ONBOARDING RESOURCES COMPANY NEWS & EVENTS CONTACT US

FOR PROVIDERS & HEALTHCARE FACILITIES  
FOR PATIENTS  
FOR PAYORS  
KNOWLEDGE CENTER  
DETENTION CENTERS & CORRECTIONAL FACILITIES  
**WHO'S PARTICIPATING**

**SYNCRONYS**  
BETTER DATA. BETTER HEALTH.

SYNCRONYS is a not for profit organization established to improve New Mexico's healthcare for all New Mexicans.

### WHO'S PARTICIPATING

- Active Life Orthotics and Prosthetics - ABQ
- Active Solutions Therapy - ABQ
- Adler Medical LLC
- Albuquerque Fire Rescue / H.E.A.R.T. Program
- Albuquerque Healthcare for the Homeless
- Alta Vista Regional - Las Vegas
- Amador Health Center
- Amazon Public Health
- Anthem, Inc./Amerigroup (Medicare Advantage)
- Armada Physical Therapy - ABQ and Rio Rancho
- Armada Skilled Homecare - ABQ & RR
- Artesia General Hospital - Artesia
- ARUP Laboratories
- Assured Imaging - ABQ & Las Cruces
- BCBS NM (Centennial Care MCO)
- Ben Archer Health Care Center
- Bio-Reference Laboratories
- Carlsbad Medical Center (Community Health Services) - Carlsbad
- Center for Disease Detection (CDD)
- Christus St. Vincent Regional MC - Santa Fe
- Cibola General Hospital - Grants
- Compassus Home Health
- Compassus Hospice Albuquerque South
- Curative Health
- De Baca Family Practice Clinic
- Distinctly Dermatology (aka NM Specialty Med)
- Eastern New Mexico Medical Center (ENMC) - El Paso
- FI Centro Family Health
- El Pueblo Health
- Farmington Family

Organizations across our state are participating with SYNCRONYS in various ways. They may be sharing data, accessing data, using direct secure messaging offered by SYNCRONYS, or any combination of several activities. You can see who is participating in SYNCRONYS and how by visiting our website and clicking on Who's Participating under the Resources banner.

## FOR ACCOUNT ACCESS ASSISTANCE



**If you have an internal help desk for your organization, please contact them, following your service request process.**

If SYNCRONYS provides your support services for the health information exchange, please contact us at:

[help@SYNCRONYS.org](mailto:help@SYNCRONYS.org) or (505) 938-9999

Daily, 8 AM to 8 PM



If you have an internal help desk for your organization, please contact them for assistance with your account, following your service request process.

If SYNCRONYS provides your support services for the health information exchange, you can reach us daily between 8 am and 8 pm at the number and e-mail address shown here.

## TO REPORT PORTAL OR DATA PROBLEMS SYNCRONYS BETTER DATA. BETTER HEALTH.

- E-Mail or call us with a brief description of the problem.
- Do not include patient identifiable information in unencrypted e-mail.
- Direct Secure Messaging is the preferred method for sending protected health information to the help desk.
- Portal Messaging may also be an option for sharing examples, once you have connected with someone on our staff.

Email: [help@SYNCRONYS.org](mailto:help@SYNCRONYS.org) or Call: (505) 938-9999

Direct Messaging: [Synchronys.HelpDesk@direct.hco.synchronys.net](mailto:Synchronys.HelpDesk@direct.hco.synchronys.net)



If you see an issue with the clinical portal, e.g., errors or display issues, please do not hesitate to let us know. You can e-mail the help desk stating that you want to report a problem or call to provide more specific patient identifiers over the phone. Do not send screenshots or messages that includes patient-identifiers unless you can do so securely, with encrypted e-mail or Direct messaging. Once you have connected with our personnel, they may have you share information securely through portal messaging.