

SYNCRONYS HIE CLINICAL PORTAL TRAINING

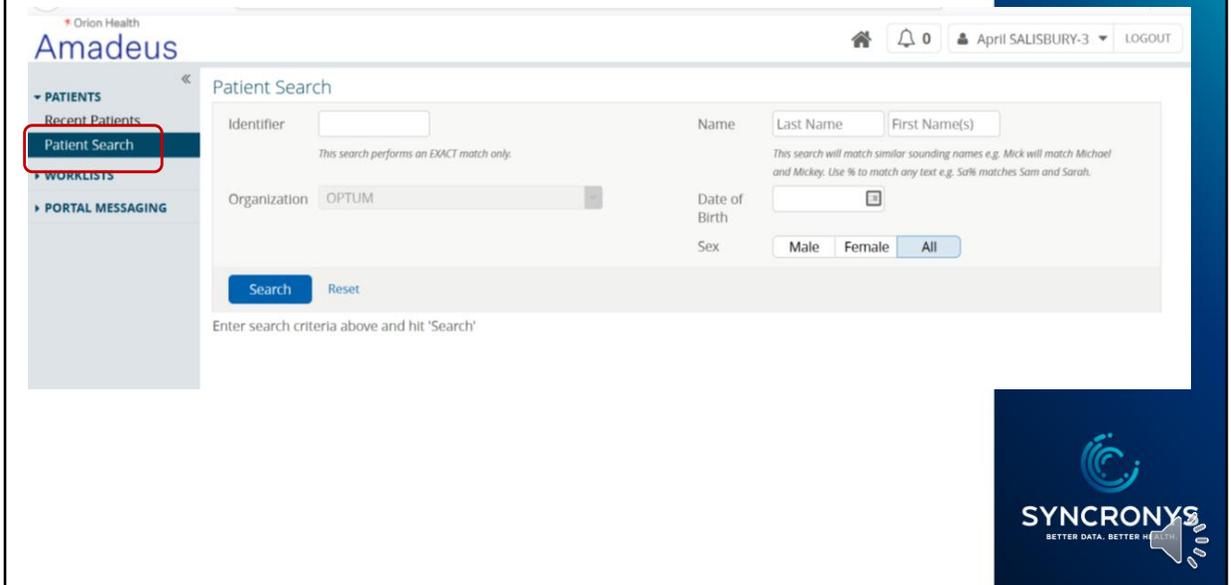
PATIENT SEARCH, RECENT PATIENTS, AND WORKLISTS
CLINICAL VIEW USERS, NM LEVELS 1, 2, 3, 4, 6b, AND 6c
WHO DO NOT HAVE SINGLE-SIGN-ON WITH PATIENT CONTEXT



If your organization uses a single-sign-on method that includes patient context as well as your user credentials, some of the information in this lesson will not be relevant. Your search will already be done in your EHR system. Therefore, you can safely skip this module.

In this lesson, we'll show you two ways to search for patient records and three ways to quickly retrieve records that you've searched before. We will discuss why you may see more than one record when you search for a patient, and explain some helpful tools, worklists and context navigation.

PATIENT SEARCH SCREEN



Unless your organization has configured single-sign-on from your electronic health record, most activities in a patient's record begin with the patient search. All access levels have access to conduct a patient search, except for End User Administrators, who may search for users instead of patients. Pictured here is the Patient Search screen, found under Patients in the left side menu. This may or may not be your home screen.

PATIENT SEARCH METHODS

Orion Health
Amadeus

Home 0 April SALISBURY-3 LOGOUT

PATIENTS
Recent Patients
Patient Search
WORKLISTS
PORTAL MESSAGING

Patient Search

Identifier 1
This search performs an EXACT match only.

Organization OPTUM

Name Last Name First Name(s) 2
This search will match similar sounding names e.g. Mick will match Michael and Mickey. Use % to match any text e.g. Sal% matches Sam and Sarah.

Date of Birth

Sex Male Female All

Search Reset

Enter search criteria above and hit 'Search'

1. Either by identifier number with associated organization, or
2. Using demographic information, i.e, Name, DOB, Gender



There are two ways to find a patient's record.

1. Either by identifier number with associated organization, or
2. Using demographic information, i.e., Name, DOB, and Gender

PATIENT SEARCH METHOD 1

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Organization

Name
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Date of Birth
Sex

<input type="checkbox"/>	Identifier	Name	Date of Birth (Age)	Sex	Phone	Address
<input type="checkbox"/>	AAR-41945-5	TEST, TEST	Jan-01-1901 (120 years)	Male		

Using an identifier number with associated organization will return an exact match with one patient.



If you know a patient's medical record from a system that sends data to the HIE, you can enter that Identifier and the organization name it came from. These two search criteria will return an exact match of the consolidated patient record that contains this local MRN. However, for various reasons... there could be records that did not merge into one, so you may want to perform your search a different way if you don't see what you need.

PATIENT SEARCH METHODS

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Enter search criteria above and hit 'Search'

Using demographic information, i.e., Name, DOB, Gender



If your organization is a payer or has intentionally limited your access to a specific roster of patients, then demographic searches will not result in additional patient matching possibilities over the search by number.

For most portal users, however, searches are done with demographic information. For this search, only use the criteria fields on the right of the screen, including Name, Date of Birth, and Gender. If you also know the person's middle name, you can add it to the first names box. Soon, SYNCRONYS will be adding additional search criteria fields that have been requested by our users.

PATIENT SEARCH METHOD 2

Demographics Search requires –

- Last name and a least one of these:
 - Date of Birth (DOB) • First Name(s) • Gender
- Wildcard character “%” may be used in Name fields
 - Example: "John%" to return "John", "Johnson", "Johnston", etc.
- Searches will return close matches
 - Example: Search for Peters could return matches for Petersen, Elizabeth for Liz, etc.
 - May produce unexpected results, maiden to married names, or people with same DOB and similar name



A wildcard character of a percent sign may be used if you are uncertain about the spelling of the first or last name. The system can return close matches and even recognize some nicknames. People with last name changes might still be found if other parameters entered are enough to narrow down a potential match.

DEMOGRAPHIC PATIENT SEARCH RESULTS

<input type="checkbox"/>	Identifier	Name	Date of Birth (Age)	Sex	Phone	Address
<input type="checkbox"/>	ABK-76623-2	MOUSE, MICKEY	Mar-15-1970 (52 years)	Male	(505)819-9173 (Home)	28B CALLE PRIVADO, SANTA FE, NM, 87508, USA (Home)
<input type="checkbox"/>	ABF-74393-9	MOUSE, MICKEY	Jan-01-1964 (58 years)	Male	(505)299-9430 (Home) (505)333-3333 (Work)	123 DISNEY LAND RD, ALBUQUERQUE, NM, 87123 (Home)
<input type="checkbox"/>	ACN-18974-9	MOUSE, MICKEY	Mar-07-1900 (122 years)	Male	(505)555-5555 (Home) (505)555-5555 (Work)	111, FARMINGTON, NM, 87114 (Home)
<input type="checkbox"/>	ABJ-74242-9	MOUSE, MICKEY	May-14-1984 (38 years)	Male	(575)627-7000 (Home)	117 E 19TH, ROSWELL, NM, 88201 (Home)
<input type="checkbox"/>	ABR-61102-8	MOUSE, MICKEY	Jun-05-2014 (8 years 6 months)	Male	(505)989-6412 (Home)	110 SUNSET RD, SANTA FE, NM, 87507, USA (Home)

- Up to 15 patients per screen; 50 maximum possible
- **Next** and **Previous** links to navigate if there are more than will fit on one screen



Searching with demographic information usually returns more than one possible match. The patient search result list will show you up to 15 patients on this screen, and using the next and previous links you may see up to 50 possible matches before the system requires additional search criteria be provided.

WHY AM I SEEING UNMERGED PATIENT RECORDS IN THE CLINICAL PORTAL?

- SYNCRONYS has over 2,247,903 unique individuals in the HIE, as measured by distinct valid SSNs.



- Multiple data sources, with different business needs for capturing and sharing patient information.
- Certain data elements **must** match. *(Some are not visible to you.)* Some are heavily weighted, so if not entered correctly, it can prevent a merge.
- Key elements that help with matching include: 1) patient address, 2) patient SSN, 3) patient (home) phone number.



The SYNCRONYS health information exchange has over 2,247,903 unique individuals in the HIE, as measured by distinct valid SSNs. SYNCRONYS is a rich data source for patient information coming in from many diverse EHR systems and organizations with different business needs for capturing information. To safely merge data into the correct patient's record, certain data elements **MUST** match. Some identifiers can be seen in the patient search result list, but other hidden identifiers, such as social security number, may be heavily weighted to ensure records are not attributed to the wrong patient's record. Key demographic elements that help with matching include: 1) patient address, 2) patient Social Security Number, and 3) patient phone number.

WHY AM I SEEING UNMERGED PATIENT RECORDS IN THE CLINICAL PORTAL?

Name:

This search will match similar sounding names e.g. Mick will match Michael and Mickey. Use % to match any text e.g. Sa% matches Sam and Sarah.

Date of Birth:

This search will match date of birth based on the formats: MMM-DD-YYYY, e.g., Jan-02-2001; MM/DD/YYYY, e.g., 01/02/2001; or DDMMYYYY, e.g., 02012001.

Sex:

<input type="checkbox"/>	Identifier	Name	Date of Birth (Age)	Sex	Phone	Address
<input type="checkbox"/>	ABE-04314-3	SHELTON, FRANCES G	Jul-18-1929 (92 years)	Female	(505) [REDACTED] (Home)	[REDACTED] ST NE, ALBUQUERQUE, NM, 87110, US (Home)
<input type="checkbox"/>	ADJ-01491-8	SHELTON, GERALDINE	Jul-18-1929 (92 years)	Female		
<input type="checkbox"/>	AEQ-55161-1	Shelton, Geraldine	Jul-18-1929 DECEASED	Female		[REDACTED] place NE, Albuquerque, NM, 87110 (Home)

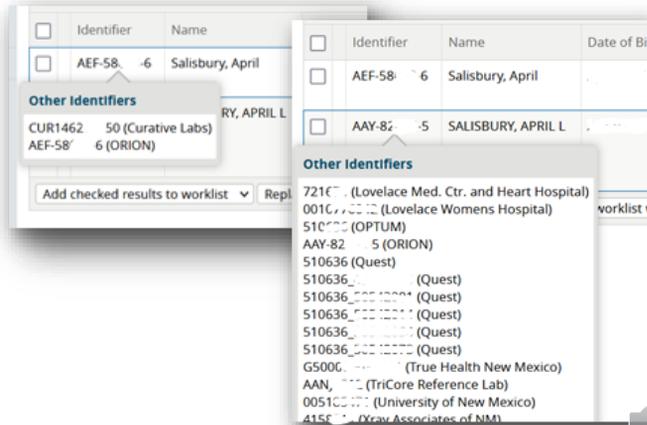
▾
 ▾

This is a real patient, but we have permission to use it for demonstration and training. I am using a screenshot to avoid accidentally showing any real names in my search. This patient search illustrates some of the reasons data may remain separate from the main record. This patient's name and address are different in each line. There may also be information that is not displayed that has prevented a merge, e.g., a difference in a social security number.

WHEN THERE IS MORE THAN ONE, HOW CAN I KNOW WHICH RECORD I NEED?



- Hover your cursor over the Identifier to see which data sources are included in that record.
- Choose the one with the most sources.
- Then use *Context Navigation* to see everything else.



It is for this reason that we recommend performing a demographic search if you are permitted to look up any patient necessary. This will ensure you find all available information. If you see results that you suspect are for the same patient, you have some options. Hovering your cursor over the (ORION) system identifier will display a pop-up list of medical record numbers that have merged into that record. In this example (on the left), you see a record that resulted from a COVID19 lab result months ago. However, in the next row down, the second record (screenshot on the right) has many MRNs, indicating most of this patient's information has been merged into that record, an indication that this one would be of greater interest unless you are looking for that COVID19 result for example.

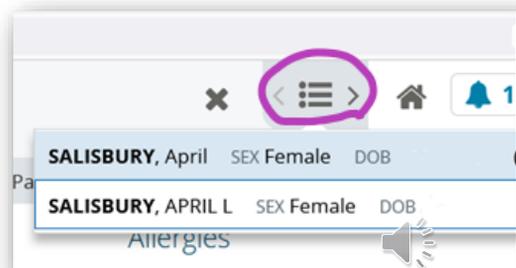
HOW CAN I VIEW ALL THE RECORDS DISPLAYED WITHOUT HAVING TO SEARCH REPEATEDLY?



Context Navigation Tool

The *context* is the list from which you selected the patient

- < Previous
- > Next
- ☰ Show me the list



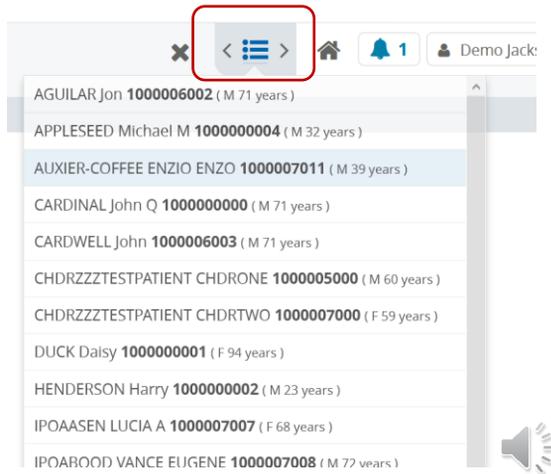
After looking at one of these records, you do not have to go back and search all over again to see the other record. Your SYNCRONYS clinical portal has a tool called “**Context Navigation**” that allows you to quickly move backward or forward within the list of patients from which you selected the individual you are currently viewing; in that case the “context” was your patient search result list. Use the forward and back arrows or click into the three horizontal lines (some call the hamburger) to see a popup of that list. Clicking into this “hamburger” icon shows you all the patients in that list of possible matches, which is extremely useful in navigating through those unmerged records you suspect belong to the same person.

CONTEXT NAVIGATION



The **Context** could be:

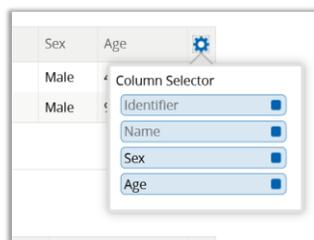
- Patient Search Result
- Recent Patients
- One of your Worklists



Context Navigation can also be used to show you the other patients in your recent patients list or a Worklist when you use one of those to select a patient.

RECENT PATIENTS

- Recent patient list is sorted by:
 - Today
 - Last 7 days
 - Last 4 weeks
 - Last 12 months
- Columns displayed may be re-configured to display fewer fields



In addition to the ability to search for patients, there are some features that will help you quickly find a patient record again.

For example, if you've conducted a patient search and had to exit the patient summary or log out, there is an easy way to find the patient again without conducting the entire search. Use the Recent Patients list in the Patients>Recent Patients entry point or the Recent Patients windowlet on the homepage. Recent patients appears on the default clinician home screen if you don't change your initial home screen setting.

WORKLISTS

- Worklists allow users to quickly access and manage patients
- Six worklists available – user may rename
 - **Red, Blue, Yellow, Green, Orange, Purple**
 - Edit columns that appear on worklist
- A user may wish to rename a worklist to follow a specific group of patients, e.g.:
 - Follow-up
 - By Care Team
 - By Condition



Anyone who can search for patients has another convenient way to store them for quick retrieval by category. You can name your six patient lists any way you like, and there are a couple of ways you can assign patients to a list.

WORKLISTS

- Add from Patient Search
- Add one at a time or in a group
- User specific
- 100 patients per worklist

 This worklist is full. To add to this worklist please remove at least 2.

Patient Search

Identifier
This search performs an EXACT match only.

Organization

<input type="checkbox"/>	Identifier	Name
<input type="checkbox"/>	AAR-03810-9	Consent1, Test
<input type="checkbox"/>	AAR-02993-2	Consent2, Test
<input type="checkbox"/>	AAR-03400-6	Consent3, Test

- Choose which list(s) to display on your home screen

My Worklist

Red

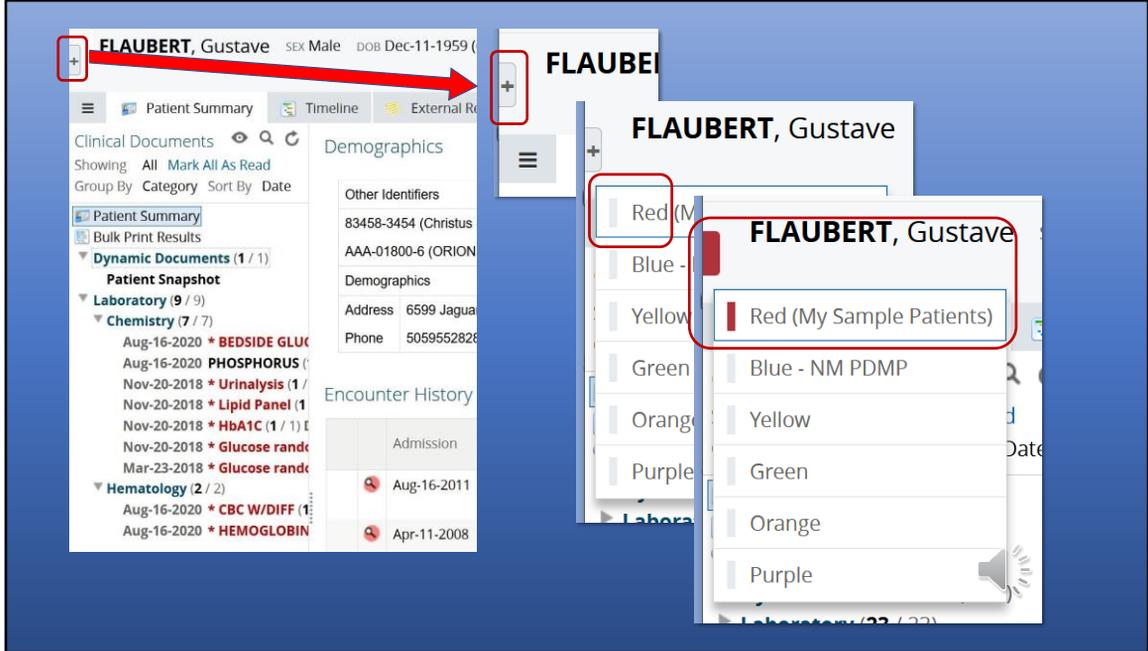
<input type="checkbox"/>	Identifier	Name
<input type="checkbox"/>	AAR-03810-9	Consent1, Test



In your patient search result list, you can click on the open box next to the identifier and choose the worklist from the dropdown menu below.

Each worklist can hold up to 100 names, and you will see a notification if you need to make room for more.

The first, or Red, worklist appears on the clinician's home page by default, but users can choose which list to show on the home screen by visiting the user preferences screen.



If you decide after you have entered a record, you have a second chance to add a patient to a worklist, by clicking into the icon at the top left side of the patient summary screen. You will see a drop-down menu of your six worklists there, and you can assign the patient to more than one list if you like.