

SYNCRONYS HIE CLINICAL PORTAL TRAINING

NAVIGATING THE PATIENT RECORD  
CLINICAL VIEW USERS, NM LEVELS 1, 2, 3



## NAVIGATING THE PATIENT RECORD



This module is for those who have access to more than patient demographics or basic encounter history information. You will learn what types of information SYNCRONYS has and how to find things quickly.

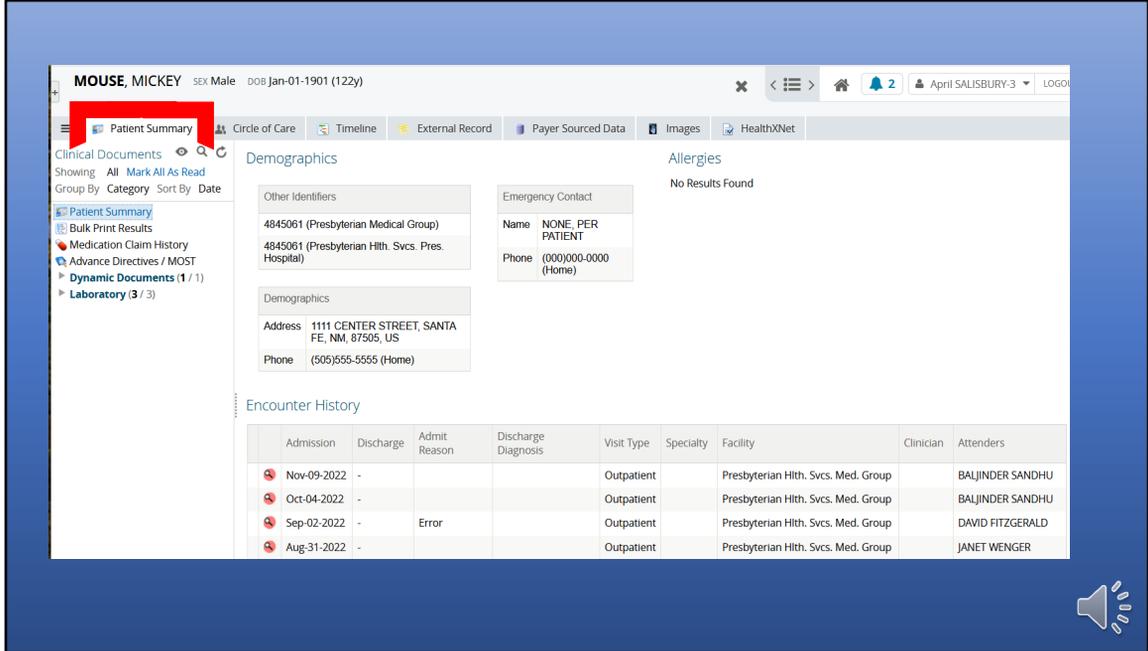
## PATIENT SUMMARY TAB



- Clinical Documents
- Insights
- Hepatitis C Summary
- Care Coordination Documents
- CCD creator, aka Patient Snapshot  
*(under "Dynamic Documents")*
- Allergies
- Demographics
- Encounters
- Medications
- Procedures
- Problems



The Patient Summary Tab is where the user lands after selecting a patient record to enter. Here is where you will find clinical documents, allergies, demographic information, a history of encounters with diagnoses, medications, procedures and active problems. There is also a customizable continuity of care document creator, called the patient snapshot.



The Patient Summary tab is displayed upon entry into patient record. The patient context bar will always be visible with the patient’s name, gender, and date of birth.

At the top right, are your navigation tools that allow you to close the record, jump to other patient records, go to your home screen, visit your preferences screen or get to context sensitive help reference materials. The upper right corner is where you will log out when you are finished using the portal.

Patient Demographic information includes all the patient’s identifying numbers, address, phone numbers, and next of kin. To the right, you will see allergies that have been reported for the patient.

# WINDOWLETS – ENCOUNTER HISTORY



**MOUSE, MICKEY** SEX Male DOB Jan-01-1901 (122y)

Navigation: Patient Summary | Circle of Care | Timeline | External Record | Payer Sourced Data | Images | HealthXNet

Clinical Documents: Showing All Mark All As Read Group By Category Sort By Date

- Patient Summary
- Bulk Print Results
- Medication Claim History
- Advance Directives / MOST
- Dynamic Documents (1 / 1)
- Laboratory (3 / 3)

**Demographics**

Other Identifiers

- 4845061 (Presbyterian Medical Group)
- 4845061 (Presbyterian Hlth. Svcs. Pres. Hospital)

Emergency Contact

- Name: NONE PER PATIENT
- Phone: (000)000-0000 (Home)

Demographics

- Address: 1111 CENTER STREET, SANTA FE, NM, 87505, US
- Phone: (505)555-5555 (Home)

**Allergies**

No Results Found

**Encounter History**

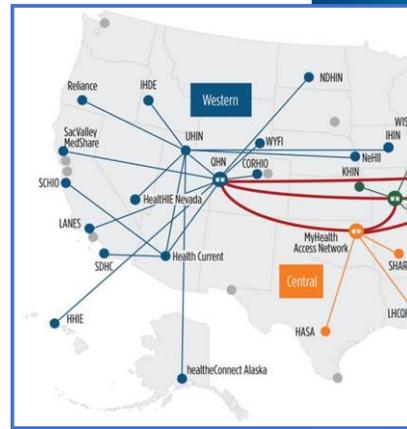
	Admission	Discharge	Admit Reason	Discharge Diagnosis	Visit Type	Specialty	Facility	Clinician	Attenders
Nov-09-2022	-	-			Outpatient		Presbyterian Hlth. Svcs. Med. Group		BALJINDER SANDHU
Oct-04-2022	-	-			Outpatient		Presbyterian Hlth. Svcs. Med. Group		BALJINDER SANDHU
Sep-02-2022	-	-	Error		Outpatient		Presbyterian Hlth. Svcs. Med. Group		DAVID FITZGERALD
Aug-31-2022	-	-			Outpatient		Presbyterian Hlth. Svcs. Med. Group		JANET WENGER

To the right of the Clinical Documents section, you will find tables, called windowlets. The default order for the rows is by date, but all windowlet tables are sortable in ascending or descending order by clicking on the desired column header. The one shown here is for the encounter history. You will see admission and discharge dates, an admit reason, the discharge diagnosis or diagnoses, the visit type, including inpatient, outpatient, and emergency department visits, the specialty, facility, and clinician for the encounter.

There are also windowlets for active problems and procedures.

## CIVITAS WESTERN REGION PATIENT ENCOUNTERS

- **Civitas Networks for Health** is a national collaborative comprised of member organizations working to use health information exchange, health data, and multi-stakeholder, cross-sector approaches to improve health.
- HIEs in our Western region have begun to share encounter information for New Mexico residents who receive care in their areas.



SYNCRONYS is a member of Civitas Networks for Health. Civitas member organizations work together to provide a patient centered data home network strategy to send information from out of area care to the patient's home HIE. HIEs in our Western region have begun to share encounter information for New Mexico residents who receive care in their areas. You will find this encounter information in the patient summary's encounter history section along with encounters that happened in our state.

Showing All Mark All As Read  
Group By Category Sort By Date

### Encounter History

	Admission	Discharge	Admit Reason	Discharge Diagnosis	Visit Type	Spec
06/07/2013 02 Discharge Su	03/06/2013	03/06/2013	Cardiology Check	Stable Angina (853) (1 diagnoses not shown)	OUTPATIENT	CARI
012			Scheduled follow up	Diabetes (5) (1 diagnoses not shown)	EMERGENCY	EME
010			Chest Pain	Stable Angina (853) (0 diagnoses not shown)	INPATIENT	CARI MED

Search Results - Mozilla Firefox  
https://train.portal.nmhc.org/cor 120%

Diagnosis

- Stable Angina (853)
- Cardiovascular Disease (151.9)

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The relevant discharge diagnosis can be seen in the Encounter History table, but often there are more than one. Use the Magnifying Glass icon to view other diagnoses related to the encounter. Any documents related to the encounter will be found on the left, under clinical documents. A caveat about encounters to be aware of is that some electronic medical record systems used in ambulatory practices cannot generate unique encounter IDs required for SYNCRONYS to present them in this windowlet. You may still find related documents in the clinical documents area, especially Continuity of Care Documents, or CCDs.

# CLINICAL DOCUMENTS

Results may be numeric (may be graphed) or textual, e.g., a radiology report

Showing All Mark All As Read  
Group By Category Sort By Date

**Patient Summary**

- ▼ Dynamic Documents (1)
- ▼ Patient Snapshot
- ▼ Laboratory (20 / 43)
  - ▼ Blood Gases (1)
    - 🕒 01/09/2005 \* **Arterial Blood Gas** (1) Dr Joe Martin
  - ▼ Chemistry (10)
    - 🕒 04/24/2012 **Electrolytes** (5) Dr Timothy Orange
    - 🕒 04/25/2006 INR (4) Dr John Black
    - 🕒 01/09/2005 Creatinine (1) Dr Joe Martin
  - ▼ Hematology (19 / 29)
    - 🕒 05/01/2012 **HBA1C** (2 / 7) Dr Joe Martin
    - 🕒 05/01/2012 \* **CBC** (17 / 22) Dr Alerberto Jose
  - ▼ Immunology (1 / 2)
    - 🕒 01/22/2001 HEPATITIS SCREEN (1) Dr. Peter Black
    - 🕒 01/22/2000 HIV ANTIBODY (1 / 1) Dr. Peter Black
  - ▼ Serology (1)
    - 🕒 01/09/2005 Cross Match Dr Alerberto Jose
  - ▼ Microbiology (5)
    - ▼ Microbiology (5)
      - 🕒 05/01/2012 \* **Urine Culture@ORION** Dr Francis McNamara
      - 11/02/2006 Midstream Urine Dr Joe Martin
      - 🕒 04/22/2006 \* **Midstream Urine** Dr Joe Martin
      - 🕒 04/21/2006 \* **Midstream Urine** Dr Timothy Orange
      - 🕒 04/20/2006 Midstream Urine Dr Joe Martin
  - ▶ Pathology (1)
  - ▼ Radiology (1 / 7)
    - ▶ CAT Scan (4)
    - ▶ Radiology (4 / 7)

**Cardinal, John Q**

Other Identifiers

AHP-ABQHIthPrt  
LHS-MedicalCtr  
LHS-MedicalCtr

Demographics

Sex	Male
Date of Birth	11/12/1949 ( 64)
Address	840 Chester Av
Phone	(463) 321-456

**Allergies & Alerts**

Details	Reaction
Latex	Difficulty b
ibuprophen	Difficulty b
Vancomycin	Wheezing
Vancomycin	allergicree
ibuprophen	allergicree
Latex	allergicree



Directly under the Patient Summary tab, you'll find the clinical documents section, which can be thought of as a file cabinet for the patient's static reports. It displays all available results and notes.

You may find other documents here, such as CCDAs, a Hepatitis C summary, assessments and notes from care managers, and insights about patient events. The reports and other documents will be categorized, and the sections collapsed by default, but you can click on the right facing triangles to expand each section. Unread documents are in bold font, and results that are out of reference range will be in red font.

# MEDICATION CLAIM HISTORY



Male DOB: [REDACTED] 011 (9y 11m)

Navigation: Patient Summary | Timeline | External Record | **Payer Sourced Data** | Images | Adv Directives/MOST

Left Sidebar: Clinical Documents | Patient Summary | **Medication Claim History** | Dynamic Documents (1 / 1) | Laboratory (10 / 10) | Radiology (2 / 2) | Unknown Category (1 / 1)

Fill Date	NDC Drug Code	Drug Description	Quantity	Days Supply	Prescribing Provider NPI	Pharmacy/Facility
Jun-27-2021	42192060816	GABAPENTIN 250 MG/5 ML SOLN	1450	90	1	WALGREENS # 13927
Jun-03-2021	68462013001	ZONISAMIDE 100 MG CAPSULE	600	30	15	HIGHLAND PHARMACY
Jun-24-2021	42806015033	AZITHROMYCIN 200 MG/5 ML SU	23	5	13L	WALGREENS # 13927
Jun-21-2021	5483800650	VITAMIN D3 10 MCG/ML LIQUID	100	30	1L	WALGREENS # 13927
Jun-10-2021	64380097025	HYDROCORTISONE 5 MG TABLET	90	60	16L	WALGREENS # 13927
Jun-07-2021	62175011843	OMEPRAZOLE DR 20 MG CAPSULE	400	20	13069	WALGREENS # 11960
Jun-02-2021	00574012901	CLINDAMYCIN (PEDI) 75 MG/5	500	11	13L	WALGREENS # 13927
Jun-02-2021	69238183107	LEVOTHYROXINE 50 MCG TABLET	30	30	1609*	WALGREENS # 13927

Currently, SYNCRONYS can show you medications that Medicaid has paid for when you click on the pill-shaped icon on the left. The Payer Sourced Data tab includes this information, plus other information sourced from Medicaid claims. We are working to encourage other claim data providers to send their claims as well.

# CLINICAL DOCUMENTS

The screenshot shows the 'Clinical Documents' section of a patient summary. At the top, there is a 'Patient Summary' tab and a 'Clinical Documents' header with icons for visibility, search, and refresh. Below this, there are options for 'Showing' (All, Mark All As Read) and 'Group By' (Category, Sort By Date). A list of categories is shown: Patient Summary, Bulk Print Results, PDMP Report URL, Dynamic Documents (1), Laboratory (96 / 106), Microbiology (4 / 5), and Radiology (3 / 4). A blue arrow points to the 'Expand or Collapse Categories' link. A red box highlights the search and refresh icons, with a list of instructions: 'Search for a known test, e.g., HbA1c', 'Show All or a Specified Date Range', 'Group by Category, Date, Service, or Author', and 'Sort by Date, Title or Author'. A blue arrow points to the 'Microbiology (4 / 5)' category, with a note: 'Numbers indicate the (unread / read) reports in each category.' A speaker icon is visible in the bottom right corner.

Search for a known test, e.g., HbA1c

- Show All or a Specified Date Range
- Group by Category, Date, Service, or Author
- Sort by Date, Title or Author

Numbers indicate the (unread / read) reports in each category.

Expand or Collapse Categories

Directly under the Patient Summary tab, you'll find helpful search and configuration tools to make it easy to find a specific result or note you may be looking for. If you are looking for a specific test, use the search icon to enter the name of the test, which hides all other documents from view. Entering a specific date range, or just grouping your documents by date can help you locate recent information quickly.

# VIEWING NUMERIC RESULTS - CUMULATIVE

The screenshot displays a 'Document View' window for a 'Complete Blood Count W/Differential' report. The main content area shows a table of cumulative results for three different dates: 05/01/2014 02:55, 05/02/2014 03:43, and 05/03/2014 03:30. The table lists various hematology parameters such as WBC, RBC, Hemoglobin, Hematocrit, MCV, MCH, MCHC, RDW, Platelet Count, MPV, Neutrophils, Lymphocytes, Monocytes, Eosinophils, Basophils, and Anisocytosis. A red box highlights the 'Anisocytosis' row, which shows values of 1+ for all three dates. Below the table, there is a 'Graph' button and a note 'No tests selected'. A tooltip is visible over the date '05/03/2014 03:30', showing details like 'Collected', 'Received', 'Reported', 'Source', and 'Order Number'.

Number	1	2	3	Ref. Range (Units)
Collected	05/01/2014 02:55	05/02/2014 03:43	05/03/2014 03:30	
Source	OHCP			
WBC	9.4			
RBC	* 3.61			
Hemoglobin	* 10.3			
Hematocrit	* 30.4			
MCV	84.4	84.2	83.5	78.0-100.0 (fL)
MCH	28.6	28.8	28.5	28.0-32.0 (pg)
MCHC	33.9	34.1	34.2	33.0-36.0 (g/dL)
RDW	* 17.1	* 16.5	* 16.7	11.5-14.5 (%)
Platelet Count	225	229	225	130-400 (K/uL)
MPV	* 6.7	* 6.7	* 6.5	7.4-10.4 (fL)
Neutrophils	* 83.0	* 84.3	* 82.6	42.0-75.0 (%)
Lymphocytes	* 7.9	* 7.9	* 7.4	21.0-51.0 (%)
Monocytes	9.0	7.4	9.1	4.0-12.0 (%)
Eosinophils	0.9	0.3	0.6	0.0-5.0 (%)
Basophils	0.2	0.1	0.3	0.0-2.0 (%)
Anisocytosis	1+	1+	1+	



If you select a report with several numeric results, you will see the same test results done at different times in a table called Cumulative view. From this table, you may either click on the header to read an individual report, or you can select various elements to graph over time.

# VIEWING NUMERIC RESULTS - CUMULATIVE

The screenshot shows a clinical document viewer interface. On the left is a navigation pane with categories: Patient Summary, Laboratory (7 / 23), Chemistry (7 / 19), Hematology (3), Immunology (1), Radiology (23 / 27), and CAT Scan (5 / 6). The main content area displays 'HbA1C (9 months ago)' and 'HbA1C Cumulative'. Below this is an 'HbA1C Graph' showing information available from Nov-20-2018 to Oct-02-2020. The graph plots HbA1C (%) over time, with data points for Jan 2019, Apr 2019, Jul 2019, Oct 2019, Jan 2020, Apr 2020, Jul 2020, and Oct 2020. The values show a general downward trend from approximately 7.5% to 4.5%. A legend indicates 'HbA1C' and the graph is set to 'All | Default'. A speaker icon is visible in the bottom right corner of the interface.

Date	HbA1C (%)
Jan 2019	7.5
Apr 2019	6.5
Jul 2019	5.5
Oct 2019	4.8
Jan 2020	4.5
Apr 2020	4.5
Jul 2020	5.0
Oct 2020	4.5

Here is an example of a graph of five HbA1C results over about two years.

# VIEWING RESULTS – INDIVIDUAL REPORTS

## Document View

Showing All Mark All As Read  
Group By Category Sort By Date

### Patient Summary

- ▶ Clinical Content (1)
- ▼ Laboratory (4)
  - ▼ Chemistry (2)
    - 02/03/2014 Basic Metabolic Panel
    - 02/03/2014 Fasting (1) Sean Mazer
  - ▼ Hematology (2)
    - 02/03/2014 Differential (1) Sean Mazer
    - 02/03/2014 CBC (1) Sean Mazer

CBC (5 weeks ago)

Print | Send

CBC Cumulative

## CBC

Collected 02/03/2014 17:57 Order Number FO9080327\_CBCD  
Ordering Provider Sean Mazer Status Final

Test	Result	Ref. Range (Units)	Abnormality	Status
WBC	6.9	4.0-10.6 (x10E3)		Final
RBC	5.48	4.64-6.00 (x10E6)		Final
Hgb	16.9	14.5-17.7 (gm/dL)		Final
Hct	49	42-53 (%)		Final
MCV	90	81-98 (fL)		Final
MCHC	34.2	31.2-35.2 (gm/dL)		Final
RDW	11.8	11.0-14.5 (%)		Final
Platelets	212	150-400 (x10E3)		Final

\* Abnormal \*\* Critically Abnormal

### Report History

Final Report from **TRL-TriCoreRefLab** Show Version History 5 weeks ago



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Viewing an individual result report will give you details of the test done on that occasion, including the report history and even an access history.

# VIEWING RESULTS - TEXTUAL

The screenshot displays a medical portal interface for a patient named FLAUBERT, Gustave. The patient's information includes sex (Male) and date of birth (Dec-11-1959, 61y). The portal shows a navigation bar with options like Patient Summary, Timeline, External Record, Images, and Adv Directives/MOST. The main content area is titled 'XR ABDOMEN 1 VW PORT (12 months ago)'. It includes a metadata table with fields for Performed (Jun-11-2020 18:33), Order Number (205505386), Ordering Provider (KATHERINE ARKWRIGHT), and Status (Final). The report text is as follows:

**Gross Description^^CSV\_HOSP\_NM** Final

Exam: 1 view abdomen with time stamped of 1632 and 1 view abdomen with time stamp of 1640

Date: 6/11/2020 5:28 PM MST

History: NG tube placement

Comparison: CT from 6/8/2020

**FINDINGS/**

The initial image demonstrates a nasogastric tube with the tip at the mid esophagus. On the 2nd image the tip is in the gastric fundus with the proximal side port at the gastroesophageal junction. There is mild gaseous distention of bowel loops in the upper abdomen.

The preceding report was prepared using voice recognition technology. Attempts were made to correct for accuracy, but please excuse grammatical or punctuation errors. Electronically Signed by: Kevin Lee MD on 6/11/2020 5:31 PM MST Reading Workstation:SFINWKS11

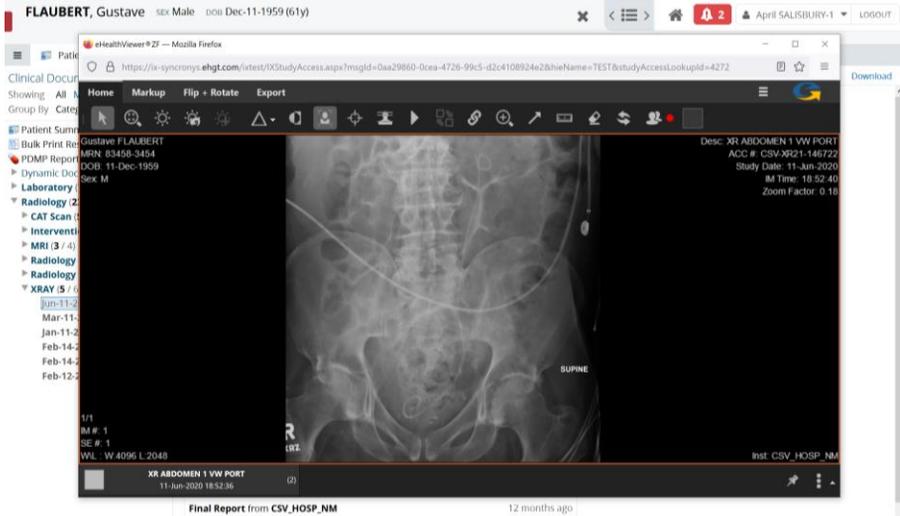
**Report History**

Final Report from CSV_HOSP_NM	12 months ago
-------------------------------	---------------



When you select a textual report, for example this abdominal x-ray, you will be able to read it, print it as a PDF, or send it to another HIE user via portal messaging. You will also see a Link to View Image, so if this radiology report has been sent by one of the radiology service providers that is sharing images as well as reports, you will be able to see the related image in diagnostic quality through the SYNCRONYS portal.

## VIEWING A RELATED IMAGE



The screenshot displays the eHealthViewer interface within a Mozilla Firefox browser. The patient information at the top includes the name "FLAUBERT, Gustave", sex "Male", and date of birth "DOB: Dec-11-1959 (61y)". The browser address bar shows the URL: "https://ix-synchronys.ehgt.com/atest/IXStudyAccess.aspx?imgId=Daa29860-0cea-4736-99c5-d2c4108924e2&hieName=TEST&studyAccessLookupId=4272". The interface features a navigation menu on the left with categories like "Clinical Document", "Patient Summary", "Bulk Print Report", "PDMP Report", "Dynamic Document", "Laboratory", "Radiology (2)", "CAT Scan (5)", "Intervention (1)", "MRI (3 / 4)", "Radiology", and "XRAY (5 / 6)". The main area shows a radiology image of an abdomen in a supine position. The image is titled "XR ABDOMEN 1 VW PORT" and includes technical details such as "ACC # CSM-XR21-146722", "Study Date: 11-Jun-2020", "M Time: 18:52:40", and "Zoom Factor: 0.18". The image is labeled "SUPINE" and "R (L)". The interface also shows a "Final Report from CSV\_HOSP\_NM" and a timestamp "12 months ago". The Synchronys logo and tagline "BETTER DATA. BETTER HEALTH." are visible in the bottom right corner.

After clicking on the View Image link, the eHealthViewer launches, showing you the high-quality image. You can collaborate with other HIE portal users in real-time using the “Share this session” icon. If you want more in depth training on this feature, please visit the training library on our website.

# VIEWING OTHER IMAGES

**FLAUBERT, Gustave** SEX Male DOB Dec-11-1959 (61y)

Navigation: Patient Summary | Timeline | External Record | **Images** | Adv Directives/MOST

Sub-navigation: HIE Imaging Worklist | Transfer to PACS | Transfer History

**Available Studies for This Patient** Show Filters

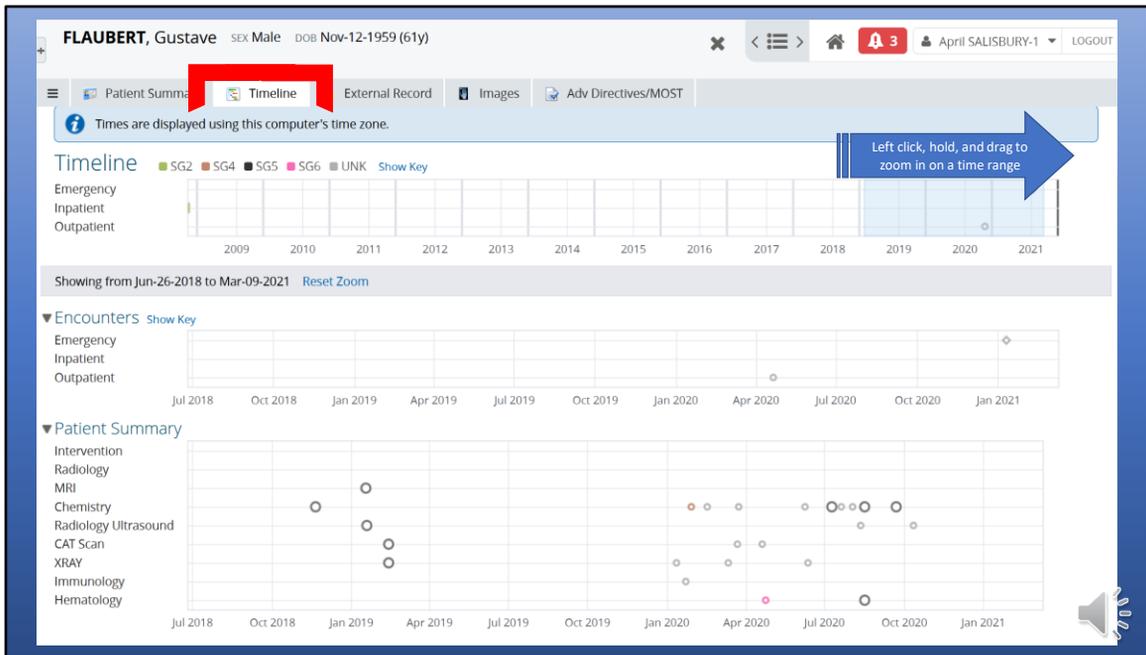
Status	MRN	Location	Multiples	Study Date	Study Description	Modality	Accession #
<input type="checkbox"/>	76239	Miners Colfax Medical Center		08/13/2020	C-SPINE AP & LAT	DX	300777821
<input type="checkbox"/>	76239	Miners Colfax Medical Center		08/13/2020	FEMUR-RIGHT	DX	300777823
<input type="checkbox"/>	76239	Miners Colfax Medical Center		08/13/2020	L/S SPINE AP & LAT	DX	300777822
<input type="checkbox"/>	83458-3454	Christus St.Vincent's Regional Med Ctr		06/11/2020	XR ABDOMEN 1 VW PORT	CR	CSV- XR21-146722
<input type="checkbox"/>	83458-3454	Christus St.Vincent's Regional Med Ctr		03/11/2020	XR FOREARM LEFT 2 VIEWS	CR	CSV- XR21-146397
<input type="checkbox"/>	Load 83458-3454	Christus St.Vincent's Regional Med Ctr		01/11/2020	XR WRIST RIGHT MIN 3 VIEWS	CR	CSV- ORT21-146492
<input type="checkbox"/>	Load 83458-3454	Christus St.Vincent's Regional Med Ctr		02/14/2019	XR ABD SERIES	CR	CSV- XR21-152477
<input type="checkbox"/>	83458-3454	Christus St.Vincent's Regional Med Ctr	ORIG	02/14/2019	XR CHEST 1 VIEW PORTABLE	CR	CSV- XR21-153282
<input type="checkbox"/>	76239	Miners Colfax Medical Center	COPY	02/14/2019	XR CHEST 1 VIEW PORTABLE	CR	CSV- XR21-153282
<input type="checkbox"/>	83458-3454	Christus St.Vincent's Regional Med Ctr		02/13/2019	CT BRAIN HEAD WO CONTRAST	CT	CSV- CT21-151292

Page size: 10 | 18 items in 2 pages

View Studies



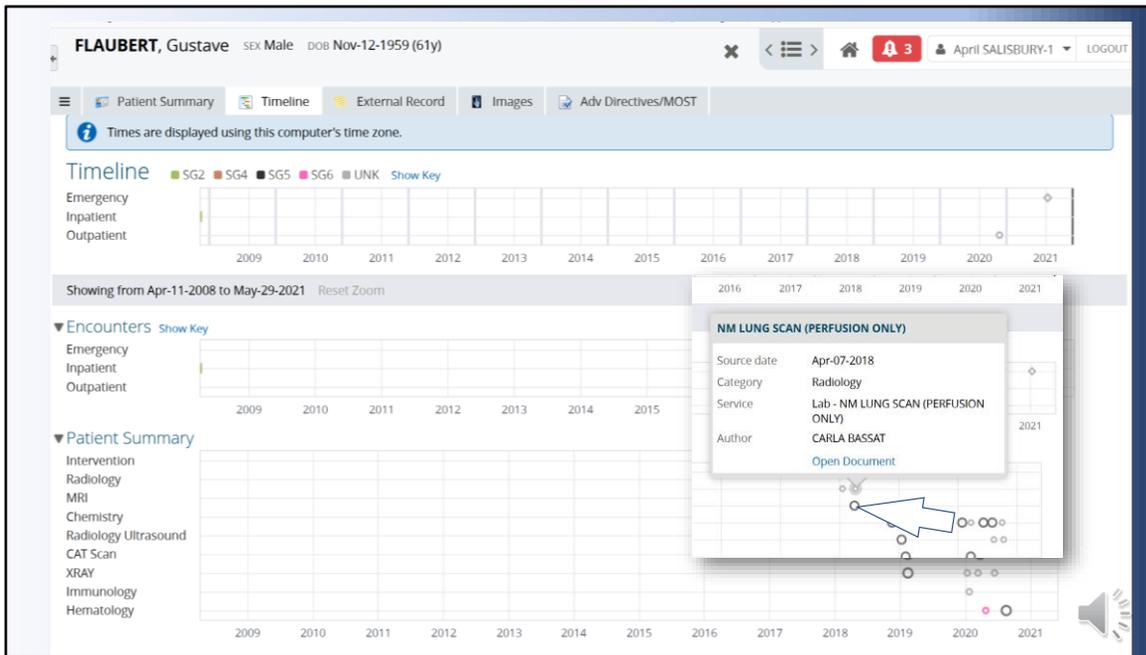
You can find other images for the same patient by clicking on the Images tab. The green status button indicates images that will be quick to load. You can select up to four images at once with the eHealthViewer. There are exceptions, e.g., PHS images are not viewable in the tab, but can be seen by launching from the radiology report. And unfortunately, some very large studies have the potential to time-out before they can be displayed. When an archived study is requested from XRAY Associates of NM it is pulled into a queue that will be retrievable in about a day.



The Timeline tab gives you a graphic representation of everything that was on the patient summary screen.

At the top, you'll easily see when a patient was seen in an emergency room, admitted or discharged from an inpatient stay, or had an outpatient encounter. Below, you can see data points revealing test results and reports.

To focus on a specific span of time, left click, hold and drag your cursor over the graph and watch the graph below zoom in.



Hovering over a data point will give you a popup with details and offer you the option of opening the document. You can always go back to the Patient Summary by clicking on that tab.

## NAVIGATING THE PATIENT RECORD



We want the clinical portal to make effective use of your time, while providing a more complete picture of your patient's health. Please watch for announcements and updated training information as we continuously improve your health information exchange.