

SYNCRONYS HIE CLINICAL PORTAL TRAINING

CIRCLE OF CARE
CLINICAL VIEW USERS, NM LEVELS 1, 2, 3



CIRCLE OF CARE TAB
FOR CLINICAL VIEW USERS
NEW MEXICO LEVELS 1, 2, OR 3



This training module introduces the Circle of Care feature now available to SYNCRONYS health information exchange clinical portal users.

WHAT IS THE CIRCLE OF CARE?



Circle of Care is just one component of the optional Coordinate Care solution being used by care managers in the SYNCRONYS HIE clinical portal. We at SYNCRONYS believe the ability to see who is part of a patient's care team and support network is a valuable part of caring for the patient. We also realize that designating yourself as part of that team when applicable will benefit other members of the care team. Finally, this application allows you to subscribe to notifications on a patient-by-patient basis if you wish. Therefore, this Coordinate component, known as Circle of Care, is being added to all HIE clinical portal users who can view patient medical records.

WHAT'S INCLUDED IN COORDINATE?



- Coordinate: An Orion Health software suite that extends the capabilities of a traditional HIE with several modules including:
 - Collaborative worklists (*Team-based care*)
 - **Circle of Care** (*Identify who is involved*)
 - Electronic Messages (*across the HIE*)
 - Standardized Clinical Pathways
 - Care Plans
- All closely integrated with other components of the Amadeus clinical portal from SYNCRONYS.



This training video only deals with Circle of Care, but to give you some context, I'll tell you that the optional Coordinate solution that is integrated with SYNCRONYS includes Collaborative worklists, electronic messaging across the HIE, Standardized Clinical Pathways, and Care Plans, but you have been given the Circle of Care component as a stand-alone addition to your standard clinical view access. If you want to learn more about the complete Coordinate solution, contact your SYNCRONYS customer relationship manager to set up an overview and demonstration.

CIRCLE OF CARE TAB



Clinical View Users may:

- View a list of the individuals and organizations involved in the care of your patient.
- Add yourself as one of those care team members.
- Supplement the list with contacts you may be aware of in the patient's support network.

Circle of Care

[Add](#) [Show Inactive \(0\)](#)

Friends & Family
There are no active friends and family in the Circle of Care.

Care Team
There are no active care team members in the Circle of Care.

Organizations
There are no active organizations in the Circle of Care.



If you have access to patient records, you will be able to view and contribute to a list of individuals and organizations involved in the care of your patient, whether they are friends and family of the patient, care team members, or organizations.

CIRCLE OF CARE TAB



Clinical View Users may:

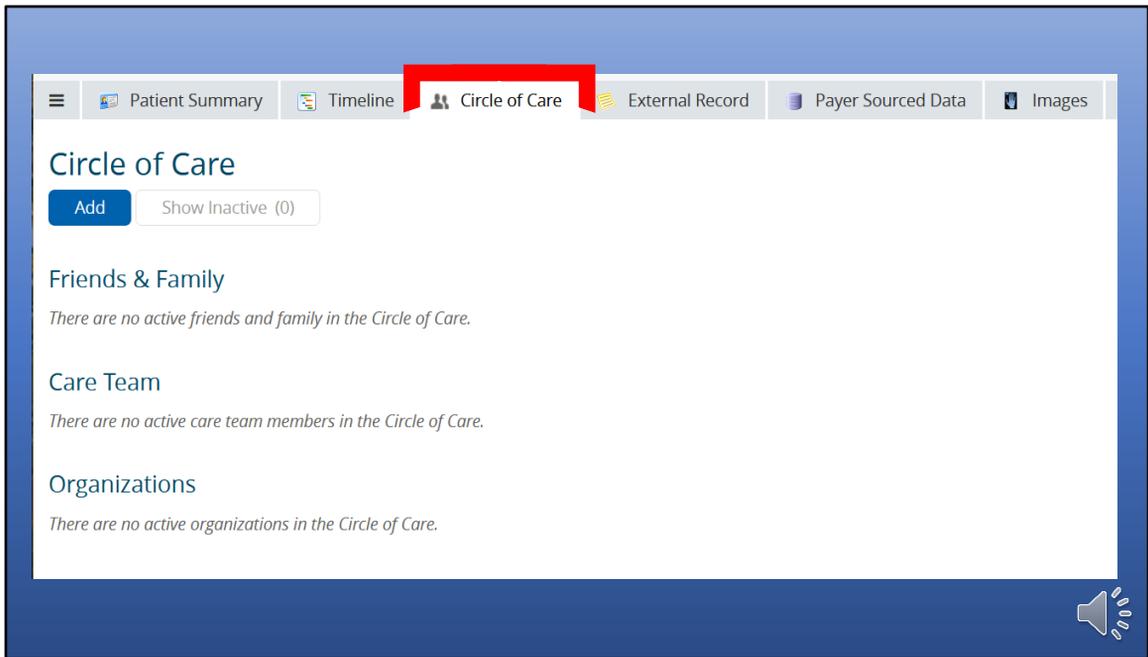
- View a list of the individuals and organizations involved in the care of your patient.
- Add yourself as one of those care team members.
- Supplement the list with contacts you may be aware of in the patient's support network.

If desired, you can then:

- Add yourself as a Notification Recipient to be alerted to events that your patient experiences, e.g., ED visits
- Subscribe to portal notifications as the Notification Recipient:
 - With real-time alerts in external e-mail (no PHI)
 - With daily summaries in external e-mail (no PHI)



Further, these clinical users can add themselves to the circle of care as a notification recipient and subscribe to portal messages when their patient has a qualifying event, such as an emergency department visit or hospitalization. Subscriptions will be covered later in this training module.



Clinical users will find the Circle of Care tab to the right of the Patient Summary tab.

Add
Show Inactive (2)

Add Member to Circle of Care

Friends & Family
 Care Team
 Organization

VIEWING THE CIRCLE OF CARE

Friends & Family

Name	Relationship	Role	Consent to Share	Contact Details
April Salisbury	Daughter	Caregiver	<input checked="" type="checkbox"/> Yes	

Care Team

Name	Role	Organizations	Contact Details
April Salisbury-3	Care Coordinator		
Dr. Robert Morse	Attending Provider		
Jane Smith	Consulting Provider		
Ms Minnie Mouse	Care Coordinator		📞 505 938-9900
Ms. Marie Baker	Care Coordinator	San Juan Regional Medical Cent...	📞 3038761234
Renee i	Care Coordinator		

Organizations

Name	Type	Contact Details
San Juan Regional Medical center	Hospital Department	

Clicking on the Circle of Care tab reveals entries that any HIE clinical portal user has made in the categories of Friends & Family, Care Team, or Organizations.

While not a verified legal HIPAA designation, under Friends & Family, users may indicate that a person in the patient’s circle of care has been authorized to receive information about the patient’s care.

VIEWING THE CIRCLE OF CARE

Add
Show Inactive (2)

Add Member to Circle of Care

Friends & Family
 Care Team
 Organization

Friends & Family

Name	Relationship	Role	Consent to Share	Contact Details
April Salisbury	Daughter	Caregiver	✔ Yes	

Care Team

Name	Organizations
April Salisb	
Dr. Robert	
Jane Smith	
Ms Minnie	
Ms. Marie	San Juan Regional M
Renee	

Organizations

Name	Type	Contact Details
San Juan Regional Medical center	Hospital Department	

Clinical Portal User

Manually entered Care Team Member

Name

April Salisbury-3
Dr. Robert Morse

Notice that under the Name column, some icons representing care team members have a circle around them. These individuals are HIE clinical portal users and may be communicated with via portal messaging. This distinction is more important for care managers using the full Coordinate care pathway module. We recommend verifying with these connections that they use Portal Messaging, as some users do not log in frequently and may miss communications if sent only via the portal.

FLAUBERT, Gustave SEX Male DOB [REDACTED]

Patient Summary Timeline

CONTRIBUTING TO THE CIRCLE OF CARE

Circle of Care

Add Show Inactive (2)

Friends & Family

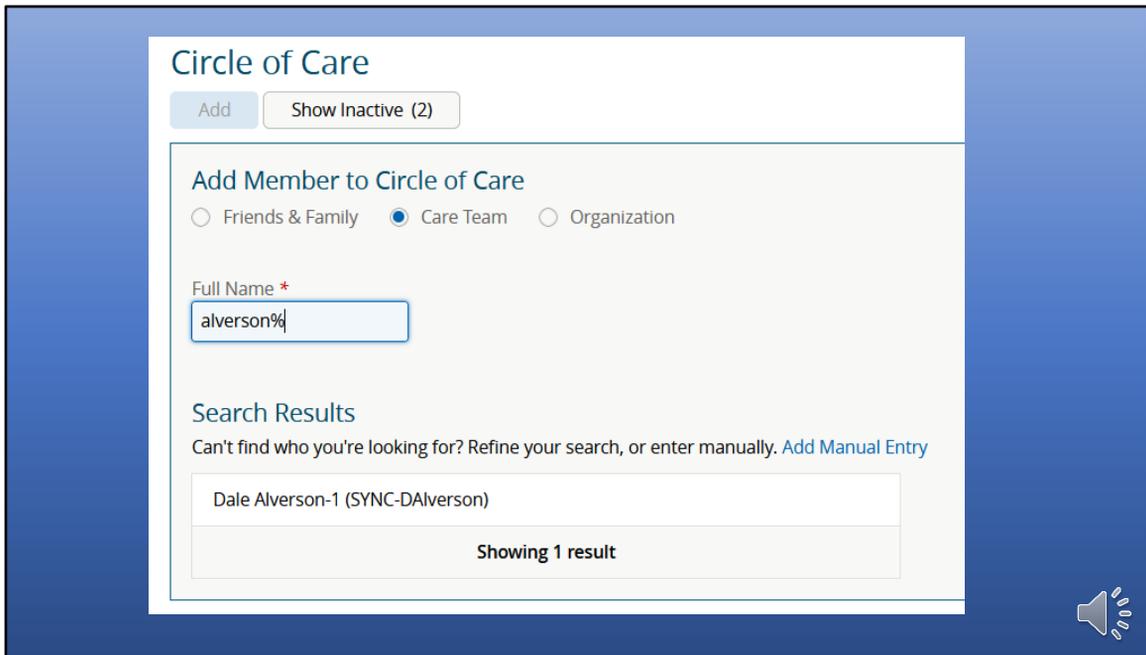
Name	Relationship	Role	Consent to Share	Contact Details
April Salisbury	Daughter	Caregiver	Yes	

Care Team

Name	Role	Organizations	Contact Details
April Salisbury-3	Care Coordinator		
Dr. Robert Morse	Attending Provider		
Jane Smith	Consulting Provider		
Ms Minnie Mouse	Care Coordinator		505 938-9900



If you have information about this patient’s circle of care, click the Add button.



Next, select the radio button for the category you wish to use, Friends & Family, Care Team, or Organization.

For a Care Team Member, you will first search to see if the person can be identified as an HIE portal user. We recommend using a wildcard or % sign at the end of the last name, as most user accounts are set up with the users' role in their last name. To add yourself, search for your name and select the correct username that you use to log into the clinical portal.

To add someone who is not found in the user directory, click on Add Manual Entry and follow the instructions to add that Care Team Member's contact information.

Circle of Care

Add Show Inactive (2)

Add Member to Circle of Care

Friends & Family
 Care Team
 Organization

Full Name *
alverson%

Search Results
Can't find who you're looking for? Refine your search, or enter manually. [Add Manual Entry](#)

Dale Alverson-1 (SYNC-DAlverson)

Showing 1 result

Dale Alverson-1

Identifier SYNC-DAlverson

Role *

Start Date *

End Date

Email

- Attending Provider
- Care Coordinator
- Consulting Provider
- Ordering Provider
- Referring Provider
- Primary Care Provider
- Admitting Provider
- Transition Care Manager
- Notification Recipient

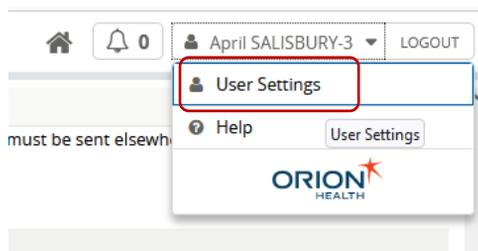
You can add yourself to the patient’s care team as an Attending Provider, Care Coordinator, Consulting Provider, Ordering Provider, Primary Care Provider, Admitting Provider, or Notification Recipient. The Transition Care Manger is a role for users of the Coordinate module. You can enter an optional end date for any status.

Circle of Care gives portal users the ability to subscribe to notifications of events this patient may have. If you want to set up portal notices for this patient, add yourself to the Circle of Care with the designation of Notification Recipient. The system will allow you to add yourself twice, once as the provider and again as a notification recipient. You can enter an end date for any status if you wish.

NOTIFICATIONS



Now NMHIC Level 1, 2, or 3 can subscribe to notifications for individual patients!



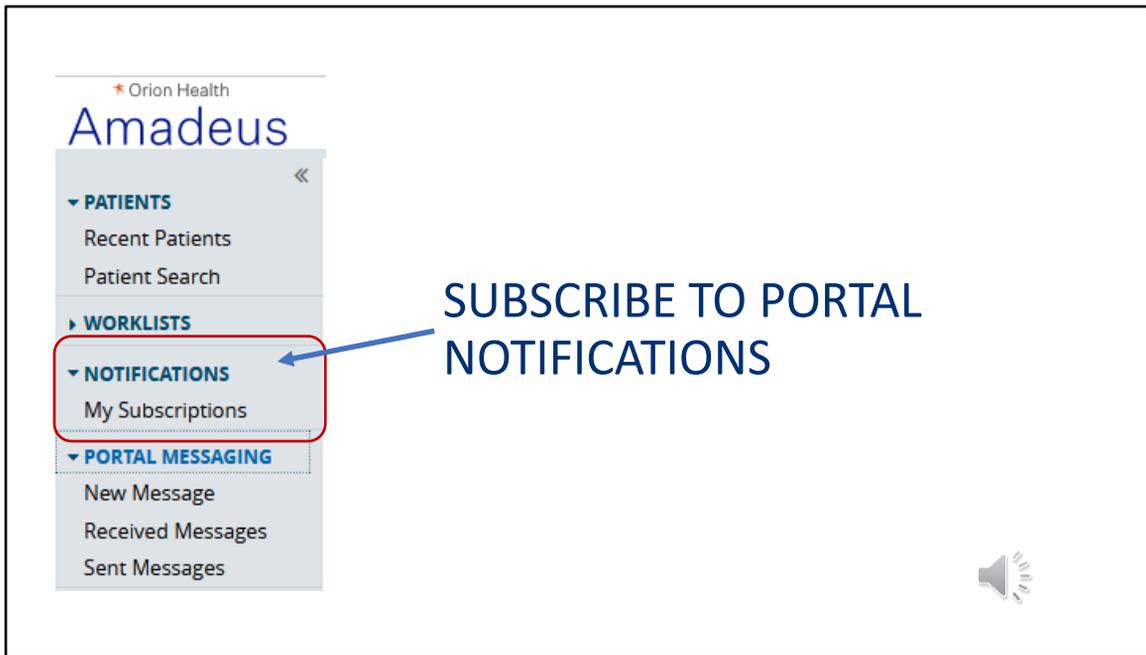
My Details

Username	SYNC-asalisbury3
	Change Password
	Change Security Question
Start Screen	<input type="text"/>
Roles I perform	NMHIC Level 3 - Care Support, Transition Care Manager
	Update Preferences Discard Changes
Users	
E-mail	<input type="text" value="asalisbury@synchronys.or"/>

Tip – Check the accuracy of your e-mail address in the User Preferences screen

With the rollout of Circle of Care, SYNCRONYS has made it possible for all clinical view users to subscribe to notifications. If you wish to do this, stay with me. In just a few steps you will have subscribed to Circle of Care notifications.

To ensure you receive notifications, it's a good idea to doublecheck that your correct e-mail address is in your user profile. To do so, enter the User Settings screen using the dropdown menu under your name in the upper right-hand side of your screen. In this screen, also called My Details, you will see an e-mail address under the header Users. If this is not correct, update it and click on Update Preferences to save your change.



The next step is to subscribe to the type, frequency, and delivery method of notifications. On the left side menu, expand the notifications entry point and click into My Subscriptions. If your organization has configured single-sign-on from your electronic medical record system, this entry point will appear as a tab instead of on a side menu.

NOTIFICATIONS – MY SUBSCRIPTIONS

Orion Health
Amadeus

Subscriptions are set to administrator defaults.

My Email Address: asalisbury@syncronys.org

By default:

- Notify By Portal Messaging
- Notify By Email
- Notify in Daily Summary Email

Choose which notifications you want to receive and where to send them. Daily Summary and Email cannot contain patient information so the detail must be sent elsewhere.
All notifications are sent as they happen except the Daily Summary, which is sent during the night.

Subscriptions for patients I have a relationship with

Laboratory - Final result is available

Laboratory - Interim result is available

Save Cancel

i You can alternatively subscribe to notifications differently for each type of relationship with the patient
Change to subscribe by Relationship Type

Delivery options appear in the upper part of the screen. Portal messaging will have clinical information, and e-mail will be simpler alerts directing you to portal mail. Choose the delivery methods you want for most notices.

For Circle of Care notifications, you need to subscribe by the relationship type used in Circle of Care, Notification Recipient. Use the blue link to expand the notification subscription screen, so you can make your selections.

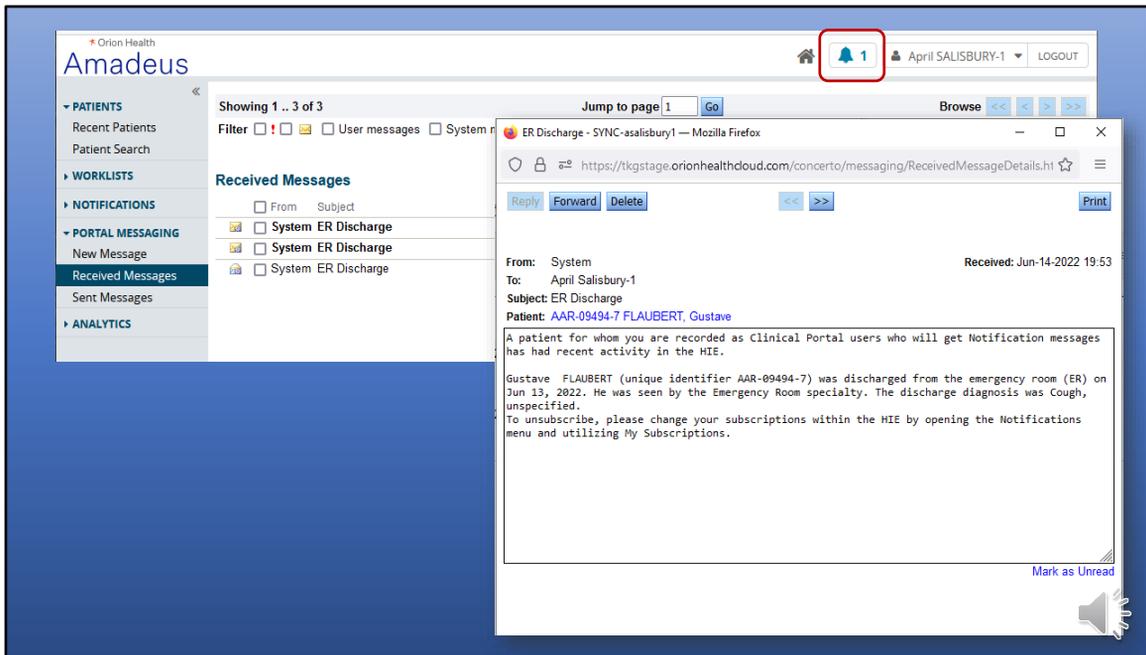
ER Discharge ⓘ Use default Change
 Inpatient Admission ⓘ Use default Change
 Inpatient Discharge ⓘ Use default Change
 Radiology - Final report is available ⓘ
 Laboratory - Abnormal result received ⓘ Use default Change
 Laboratory - Critically abnormal result received ⓘ Use default Change
 Laboratory - Final result is available ⓘ
 Laboratory - Interim result is available ⓘ

Subscriptions for patients where I am the Notification Recipient

Notification	Delivery Options
<input checked="" type="checkbox"/> ER Admission ⓘ	Use default Change
<input checked="" type="checkbox"/> ER Discharge ⓘ	Use default Change
<input checked="" type="checkbox"/> Inpatient Admission ⓘ	Use default Change
<input checked="" type="checkbox"/> Inpatient Discharge ⓘ	Use default Change
<input type="checkbox"/> Radiology - Final report is available ⓘ	
<input checked="" type="checkbox"/> Laboratory - Abnormal result received ⓘ	Use default Change
<input checked="" type="checkbox"/> Laboratory - Critically abnormal result received ⓘ	Use default Change
<input type="checkbox"/> Laboratory - Final result is available ⓘ	
<input type="checkbox"/> Laboratory - Interim result is available ⓘ	

ⓘ You can alternatively subscribe to the same notifications for all patients regardless of the type of relationship.
[Change to subscribe the same way for all patients](#)

The expanded screen now shows this section, Subscriptions for patients where I am the Notification Recipient. Select the events that you want notices about. The delivery options will follow the defaults you selected at the top of this screen, but each event can have a customized setting. For example, perhaps you want real-time notices of ER or inpatient discharges, but a daily summary for a new report is just fine.



When your patient experiences an event that you specified you wanted a notice about, a message with patient details and a link to the patient's summary screen are delivered to your portal message Received Messages inbox by default. The portal message indicator at the top of the screen will alert you to the presence of a portal message. If you also chose external e-mail delivery, either in real time or in a daily summary, you should receive a message without patient identifiers at the e-mail address you provided in your user profile.