

SYNCRONYS HIE CLINICAL PORTAL TRAINING

PACKAGING AND SHARING DATA  
CLINICAL VIEW USERS, NM LEVELS 1, 2, 3



**SYNCRONYS**

BETTER DATA. BETTER HEALTH.

## PACKAGING AND SHARING DATA

Patient Snapshot – Bulk Print – Portal Messaging



This lesson will show you ways to print, capture, and share information that clinicians find in the clinical portal.

# PATIENT SNAPSHOT - CCD

- Continuity of Care Document, a.k.a., Patient Snapshot

The screenshot displays the 'Patient Snapshot' interface. At the top, there are links for 'Download', 'Print', 'View CDA', and 'Customize' (highlighted with a red box). Below this is a notification box stating: 'Changes to the patient snapshot are temporary. They will be remembered until you leave page, or the page is refreshed.' The main area contains a list of categories with dropdown menus and time range selectors:

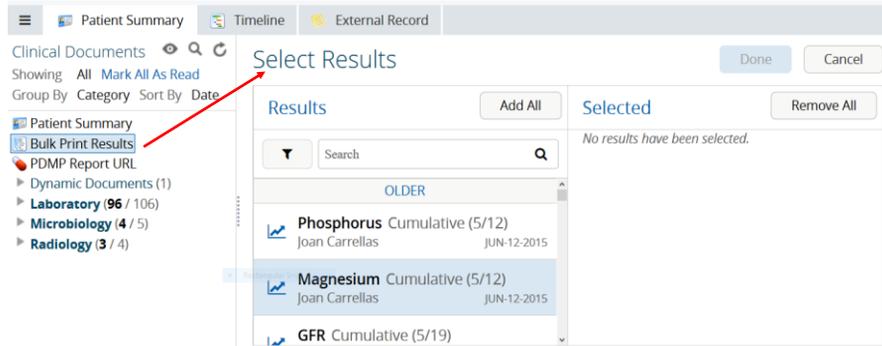
- Allergies: All Active Allergies
- Problems: All Problems
- Medications: No Medications
- Procedures: With Onset Date... within the last 3 year(s)
- Results: With Collection Date... within the last 4 week(s)
- Encounters: With Admission Date... within the last 6 month(s)

At the bottom of this section are 'Customize' and 'Cancel' buttons. On the left side, there is a sidebar with 'Clinical Documents' and a search icon. Under 'Dynamic Documents (1)', 'Patient Snapshot' is highlighted with a red box. Below the main content, it says 'Continuity of Care Document' and 'Generated by: Orion Health Shared Platform Generation Date: Jun-20-2021'. The Synchronys logo is in the bottom right corner.

You can pull out an entire year of patient information by creating your own Continuity of Care Document, or CCD. It contains allergies, problems, medications, procedures, results, notes, and encounters. Click on Patient Snapshot under Dynamic Documents to produce a PDF document. The default timeframe for generating a CCD with this portal is 1 year. You can modify the standard CCD by clicking on the “Customize” link and choosing a different time frame for any of these categories. The resulting PDF can be downloaded or printed.

# BULK PRINT RESULTS

- Bulk Print Results feature



Laboratory, Microbiology, and Radiology document types are supported by the Bulk Print Results tool.



If you do not need a full CCD, but need several lab reports printed, you might consider using the Bulk Print Results tool. This is an add-on feature that allows reports and lab results to be printed or downloaded in one file from the Results Viewer application. It works for documents in the Laboratory, Microbiology, and Radiology folders. Applications external to Results Viewer, like Incoming CCDs, Hep-C Summary, PDMP, and External Records, would not be available for Bulk Print.

# BULK PRINT RESULTS - STEPS



Select Results

Done Cancel

Some Results are not shown as they cannot be served by this tool

Filter << Results Add All Selected Remove All

Search

**Filter**

Results

- Blood Gases (1)
- Chemistry (6)
- Hematology (2)
- Serology (1)
- Surgical Pathology (1)
- Microbiology (2)
- CAT Scan (2)
- Radiology (2)

Deselect All

**Results**

- Chest x-ray  
Dr Joe Martin 13-APR-2009
- Midstream Urine  
Dr Joe Martin 03-NOV-2006
- INR Cumulative (4/4)  
Dr J Martin 26-APR-2006
- \* Midstream Urine  
Dr Leroy Hood 23-APR-2006
- Mole Biopsy  
Dr J Martin 20-MAR-2006
- Chest CT  
Dr Joe Martin 05-MAY-2005

**Selected**

CHEMISTRY

- \* Coag Cumulative (2/2) Dr J Martin 18-Aug-2011
- \* LFT Cumulative (1/1) Dr J Martin 18-Aug-2011
- Troponin Cumulative (3/3) Dr J Martin 17-Aug-2011

HEMATOLOGY

- \* HBA1C Cumulative (1/1) Dr J Martin 18-Aug-2011

SURGICAL PATHOLOGY

- Mole Biopsy Dr J Martin 20-Mar-2006

1. On the **Results Bulk Print** screen, select the **Select Results** button.
2. Using the **Filter** panel and **Search** field, find and select the results that you need.
3. By default, you can select up to 20 results.
4. Review the list of results to be included in the file in the **Selected** panel.
5. Select the **Done** button to add all the results from the **Selected** panel to the single file.

# BULK PRINT RESULTS - STEPS



If you want to...	Then...
Download the consolidated results	Select the Download button to initiate the downloading process. Use your web browser user interface to save the compressed file to your preferred destination.
View and print the consolidated results	Select the View & Print button to open the single results file in PDF format on the screen. You can then print this PDF results file directly or download it onto your local drive if required.



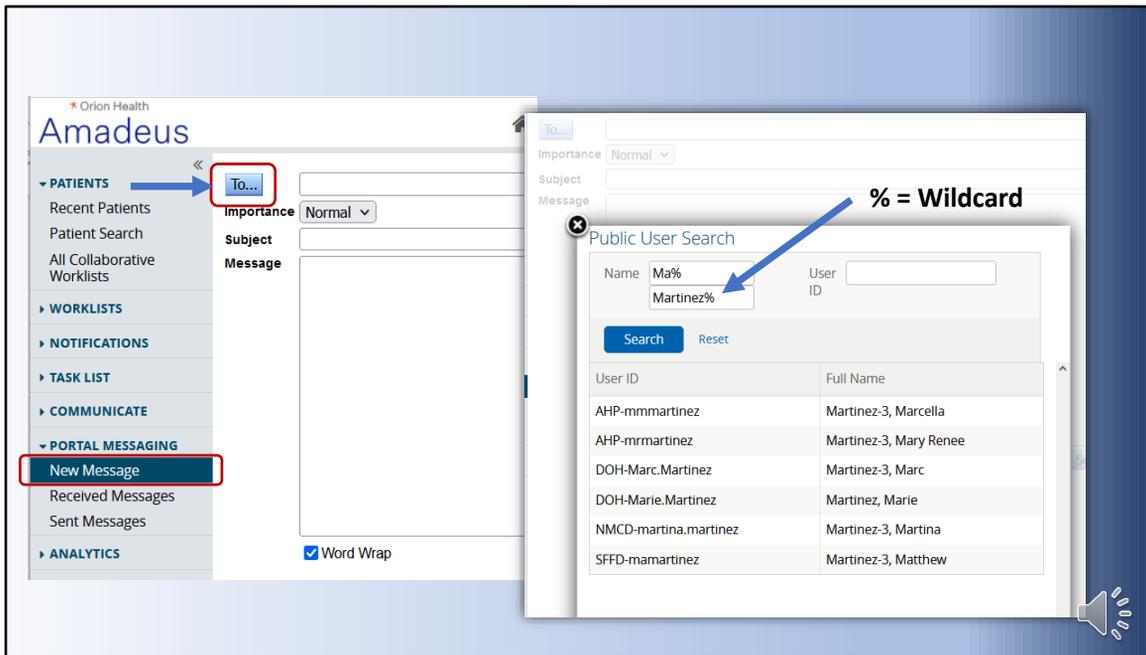
1. Once the file is generated, you can do the following options:
2. Download the consolidated results - Select the Download button to initiate the downloading process. Use your web browser user interface to save the compressed file to your preferred destination.
3. View and print the consolidated results - Select the View & Print button to open the single results file in PDF format on the screen. You can then print this PDF results file directly or download it onto your local drive if required.

**PORTAL MESSAGING**

- Secure messages between portal users
- Does not send external attachments, but...
- Can send links to patient record screens
- Do not use for urgent messages; not all portal users pay attention to portal messages

Portal Messaging is a secure way to send patient information to other HIE portal users. The message can carry links to patient summary screens and even individual reports.

Not all users take advantage of portal messaging, so make sure that this feature is used by your intended recipient before sending anything urgent.



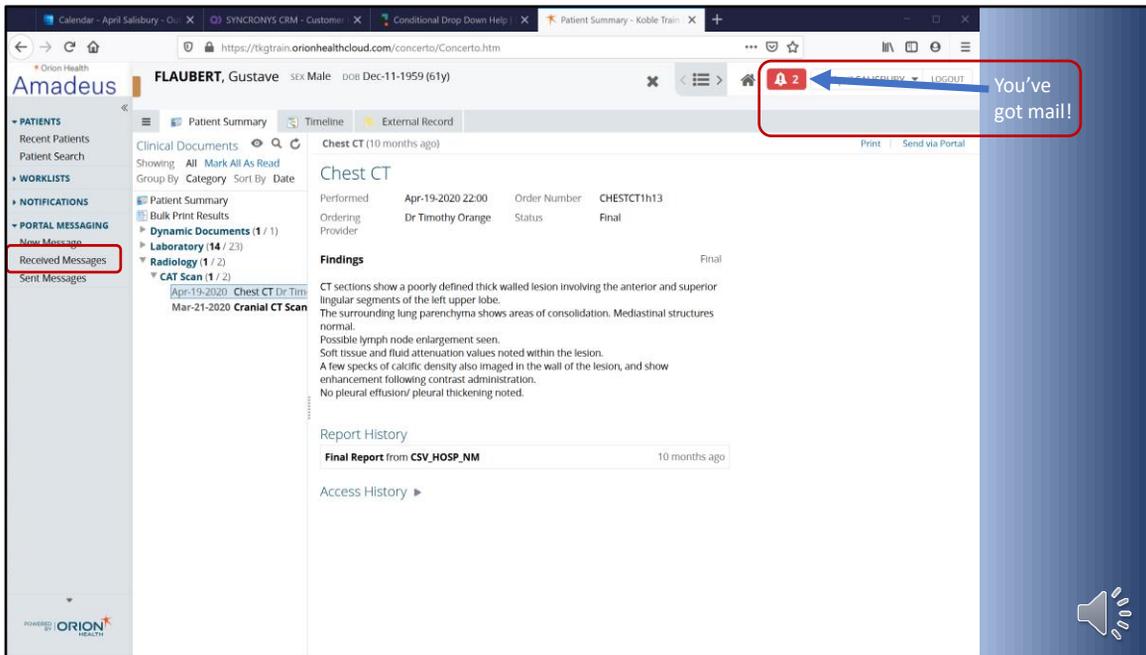
When you want to send a secure message using the HIE portal messaging feature, click on New Message to get a blank message. Next, click on the To... button to search for a user.

It is common practice to add a role number to the end of last names, so when searching for a person, use a wildcard of a percent sign at the end of the name to see all possible matches.

Remember: When searching the user directory by last name, insert a wildcard (%) at the end.

When you want someone else to pay attention to a patient summary or individual document in the HIE clinical portal, you can send them a link to that information by using the “Send via Portal” link. Click Send via Portal to create a new message with links to the patient’s summary and to screen you are viewing.

As shown in the previous slide, click on the “To...” button to search for a user by name, choose the importance level indicator, and type in a subject. Then click Send.



You have a Portal Messaging indicator next to the home icon. The number indicates how many unread messages you have in your Received Messages box. The red exclamation mark means that at least one message waiting for you has been marked important. You have two ways to get to your messages, through the side menu or through the message icon at the top right.