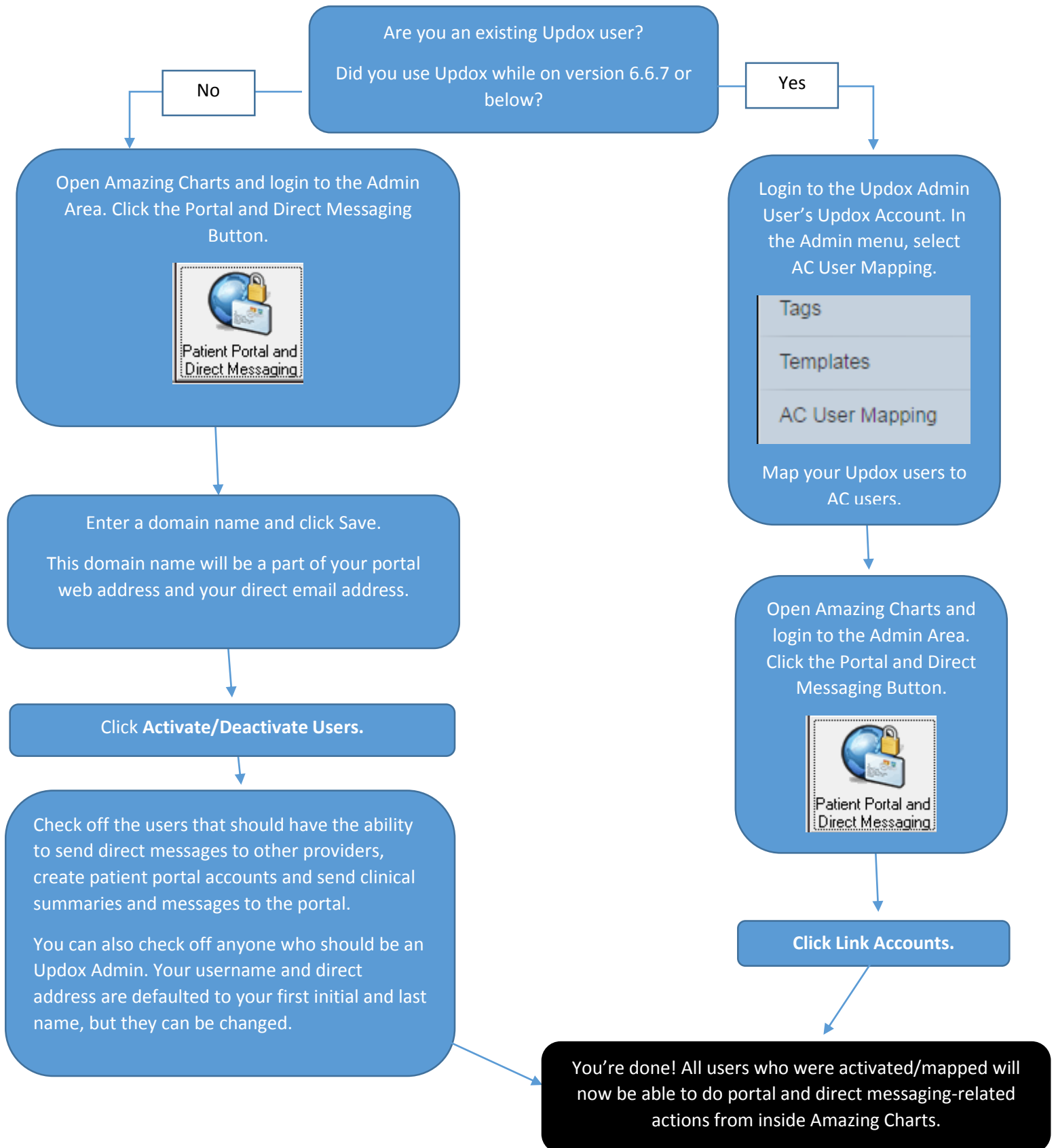




Using the Portal and Direct Messaging

HOW TO SETUP AND USE PORTAL AND DIRECT MESSAGING FUNCTIONALITY
STARTING IN VERSION 7

Set up your practice and user accounts



Transfers of Care via Direct Message (and what's the Direct Trust?)

To send a transfer of care electronically, it must be sent as a Direct message.

Why is it called a Direct message?

Direct messages are messages sent via one Direct address to another Direct address. It differs from regular email because of the additional security layers to help keep patient information from reaching fake or incorrect people, or being intercepted.

A Direct address is automatically created for any Amazing Charts user who was created from within Amazing Charts or mapped from Updox. You can view your Direct email address in the Admin Portal and Direct Messaging Activate/Deactivate Users screen. You will need to communicate this secure email address to other providers that want to send transfer of care documents to your office.

Are you having trouble sending messages to certain Direct addresses?

Any Direct address created by Updox is a part of what is called the "Updox Trust Bundle. All users in the Updox Trust Bundle can send Direct messages to each other without going through the vetting process.

If two parties don't both belong in the Updox Trust Bundle both those parties will need to be "vetted" before they can send messages to each other. Being vetted means that you have proven your identity by providing information that can be independently validated to the Direct Trust. The Direct Trust then knows that you are a real provider/person and that messages sent to you or sent from you should be allowed over the Direct network.

If you have joined the Direct Trust, but are having trouble getting messages to another Direct Address, it is possible that THEY have not joined the Direct Trust yet.

How to: Sending Direct Messages

You *can* send a Direct Message from within the Updox Inbox, but if you want the message to count toward your Meaningful Use numbers, you'll need to send the message from within the patient's chart.

1. In the Summary Sheet of the Patient's Chart, there is a section called Reports & Resources. If you click on The Transfer of Care button in this section, you'll be asked to identify the recipient of the Transfer of Care



2. Choose "Send Direct" to use your Direct email account. Any information you enter in the Transfer of Care reason will be WITHIN the CCDA and is NOT the message the receiving provider will see in their inbox. The message to the provider can be entered in the next screen.

Transfer of Care

Transfer of Care Reason

Enter the reason for your referral. Anything you type here will be included in the Transfer of Care.

Evaluation of Cardiac dysrhythmia for consideration for surgery|

Referral Information

Select a Patient Referral

White, Robert (Family Medicine ▾)

Print/Export/Send

Print Preview Print Export Send Direct

Export Location:

Close

- In the Send Direct Screen, enter the recipient's direct address, write a subject and message and click Send.

- Once Updcox lets Amazing Charts know that the message was successfully accepted by the other provider's system, it will appear in the Record Releases tab of the patient's Demographics page, and you will be able to link it to a referral for it to count for Meaningful Use.

Alerts & Directives Miscellaneous Info Referrals & Consultants Next of Kin Record Releases PHRs/HIEs Immunization Info					
Date	Address	Phone	Released By	Reason	
9/22/2014	1446 MISSION STREET,	(707) 846-5989	Ben Cox, DO	Transfer of Care, direct	Print
					Refresh

Alerts & Directives Miscellaneous Info Referrals & Consultants Next of Kin Record Releases PHRs/HIEs Immunization Info						
09/22/14: Transfer of Care, direct to JENNIFER ANISTON					Link	Add
Name	Starts	Ends	Visits	Comments		
Jones, William	9/22/2014	10/22/2014	0			

Patient Portal

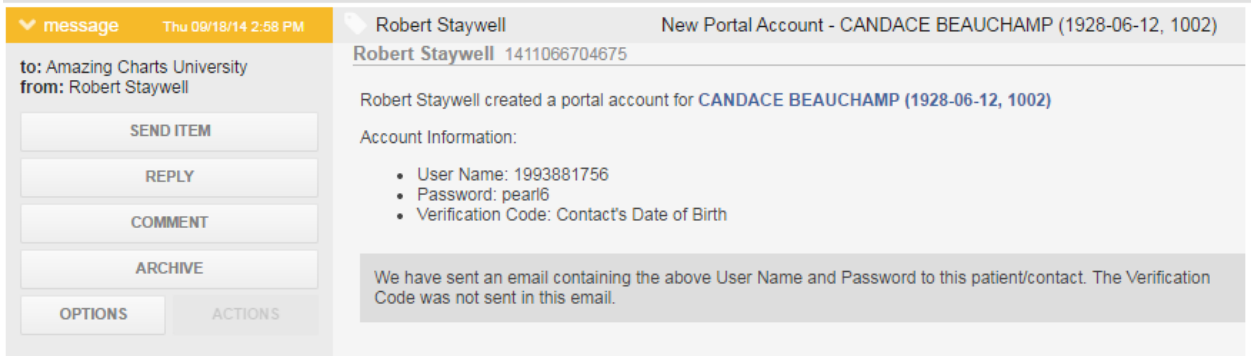
How to: Create a Patient Portal Account

1. Open the patient's chart.
2. Check whether or not an email address has been saved for the patient. If the patient has an email address entered when the portal is created, their username and password will be sent directly to that email address. If they do not have an email address entered when the portal is created, someone from the practice will need to go into their Updox Inbox and retrieve the username and password for the patient. (see Step 6)
3. Check off the Create Patient Portal checkbox.
4. Click Update Info.

The screenshot shows a patient chart for JANE DOE, DOB: 11/18/1974, ID: 1144. The interface includes a menu bar (File, View, Help, Lock) and tabs for Demographics, Summary Sheet, Most Recent Encounter, Past Encounters, Imported Items, and Account Information. The main form is divided into sections: Demographics (Name, Date of Birth, Sex, SSN, Marital Status, Address, City, State, Zip, Email Address, Home Phone, Cell Phone, Work Phone, Contact Preference, Race, Ethnicity, Employer Name), Billing Info (Patient ID, Insurance, Phone, Cell), and General Info (Miscellaneous Info, Referrals & Consultants, Next of Kin, Record Releases, PHRs/HIEs, Immunization Info, Restrict Chart Access From, Insurance & Billing Info, Update Info). The 'Create Portal Account' checkbox is highlighted with a red circle, and the 'Update Info' button is highlighted with a red arrow.

5. The portal account will be created, and you will be given confirmation of this immediately on screen.

6. If you need to retrieve the username and password for the patient, click on the “Secure” button above the Patient List and find the New Portal Account message for the patient in question.



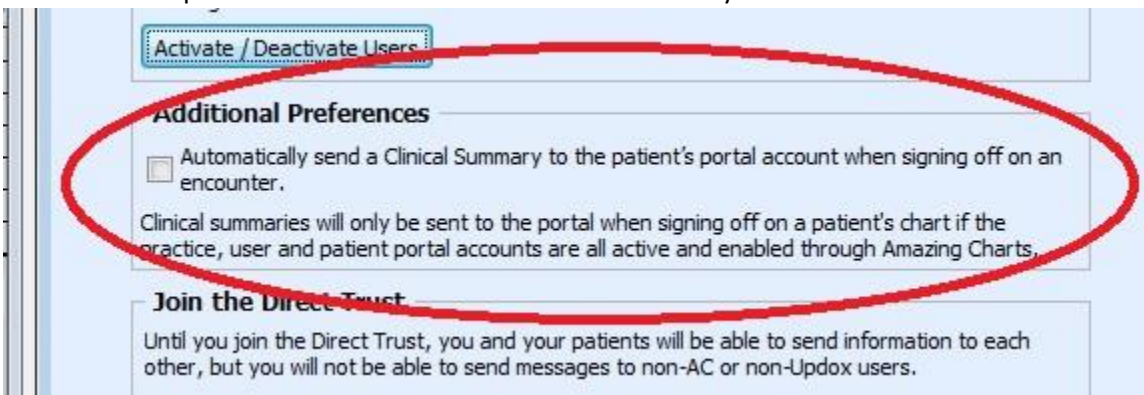
How to: Send the Clinical Summary to the Patient’s Portal

The Clinical Summary can be sent automatically to the portal when signing off on a patient’s chart if the option to do so has been turned on in Admin. The Clinical Summary can also be manually sent to the portal from the patient’s Summary Sheet.

Note: There are two kinds of Clinical Summaries – the Full Patient Record and encounter-based Clinical Summaries. Sending the Full Patient Record counts for both the Electronic Copy of Health Information and Clinical Summaries measures of Meaningful Use (Core 11 & 12 for Stage 1, and Core 7 & 8 in Stage 2 respectively). Sending the encounter-based Clinical Summary only counts for the Clinical Summaries measure (Core 12 of Stage 1 and Core 8 of Stage 2) of Meaningful Use.

Automatic Sending

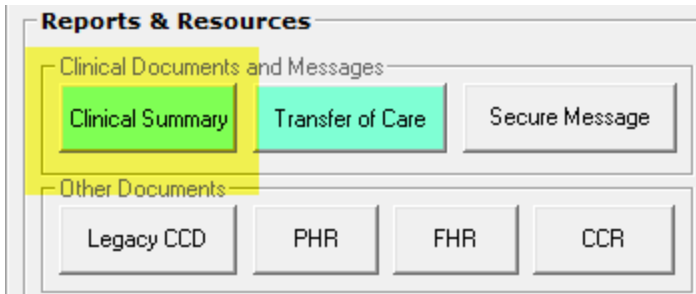
1. To send the clinical summary automatically on chart sign off, login to the Admin area and click the Portal and Direct Messaging button.
2. Check off the option to send clinical summaries automatically and click Save.



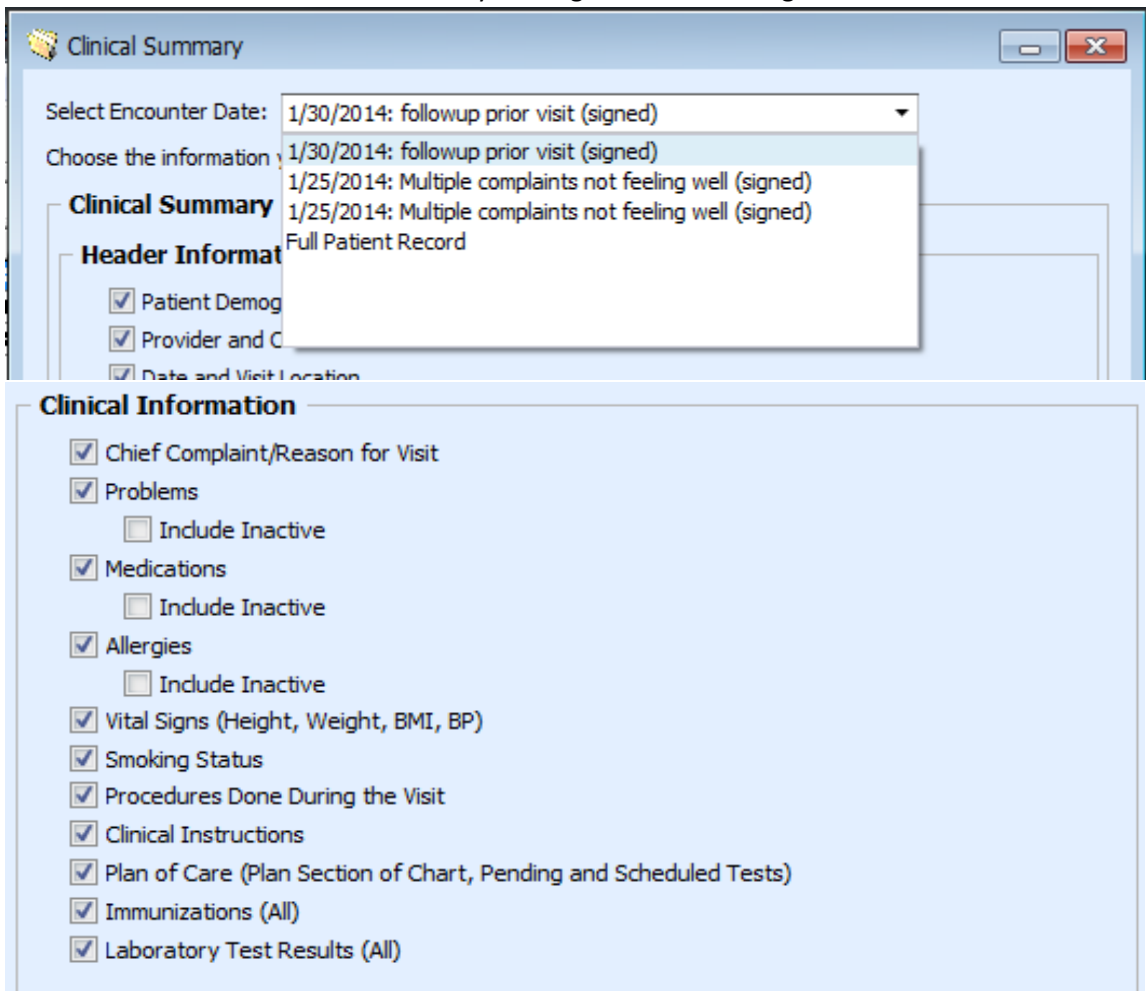
3. If the patient has a portal account and the user who signs off on the chart is activated, then the clinical summary will be automatically sent to the portal on chart sign off.

Manual Sending

1. Go to the patient's Summary Sheet.
2. In the Reports & Resources area, click Clinical Summary



3. In the Clinical Summary Options screen, select the encounter date of the Clinical Summary or select Full Patient Record, and choose the items to include in the Clinical Summary. These selections can be saved for future use by clicking the "Save Settings" button.

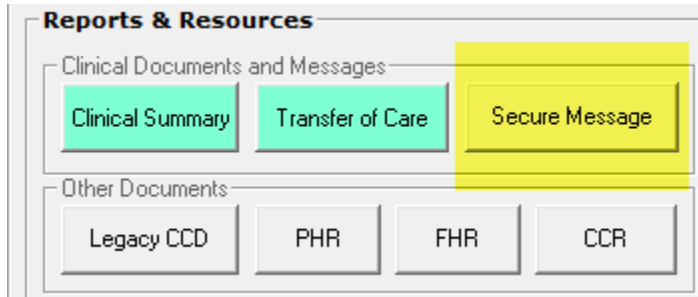


4. Click Send to Portal.
5. Once the clinical summary is sent, you will receive a confirmation message.
6. What does the patient see in the portal? See the next section.

How to: Send a secure message to the patient's portal.

The clinical summary is sent to the patient's portal as a standalone document. If you'd like to send your patient a message about certain information in the portal, or contact them for another reason, you can also send a text-based message to them from the Summary Sheet as well.

1. Go to the patient's Summary Sheet.
2. In the Reports & Resources area, click Secure Message



3. Type in a message subject and body and click Send.

What the patient sees

What a Clinical Summary looks like to the patient in their Portal

The patient can View, Download or Transmit the clinical summary that is sent to their portal account. They can view the Clinical Summary as a human-readable document and download it. They can also download the .xml version of the document (so they could, for example, save it on a USB to give to another provider that can import that data into their EHR). Or, they can transmit the .xml and human readable version to someone else, as long as that person has a Direct address.

CANDACE BEAUCHAMP
Send Message | My Profile | Sign Out

Home Messages **Records**

My Records

Continuity of Care Documents (CCD) and Continuity of Care Records (CCR) are two different file formats for representing patient health data. They are often used when transferring patient information from one computer system to another.

Your records are typically available in 2 formats:

- as a data file (in XML format), which you can download and provide to other practices or upload to a personal health record (such as Microsoft HealthVault)
- as a human readable report (in HTML format), which you can read yourself

Message from your doctor:
Please review the attached clinical summary document.

Continuity of Care Document (CCD) *Amazing Charts University has not yet provided a CCD record for you.*

Continuity of Care Record (CCR) *Amazing Charts University has not yet provided a CCR record for you.*

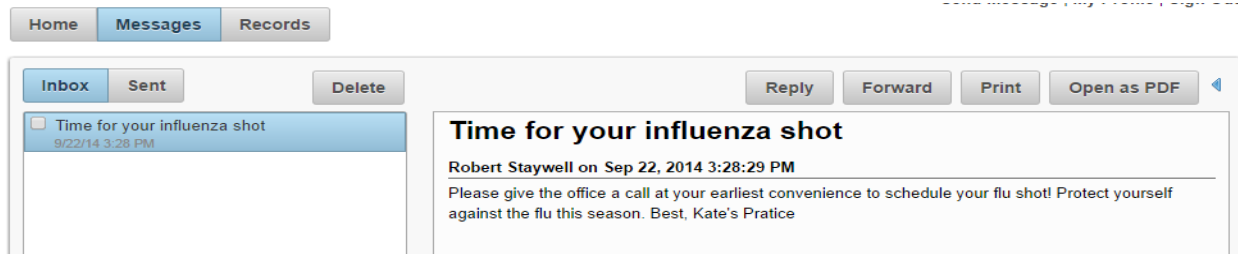
Consolidated Clinical Document Architecture (CCDA)
from 2014-09-22 7:26:55 pm View Download text Download data Transmit

Continuity of Care Document - C32 Standard (C32) *Amazing Charts University has not yet provided a C32 record for you.*

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What a message sent to the patient looks like in their Portal

When a message is sent to the patient's portal, it will show up in their Inbox until or unless they respond to it or delete it.



Messages sent to you

Messages you receive are stored in the Updox Inbox.

How to: Review my messages from patients and other providers

Any activated user can access their own Updox Inbox by clicking the Secure button on the main Amazing Charts screen. There is no need to enter a username or password when you do this – you are automatically logged in

