Help for Patient Search / Sync Status Portlet

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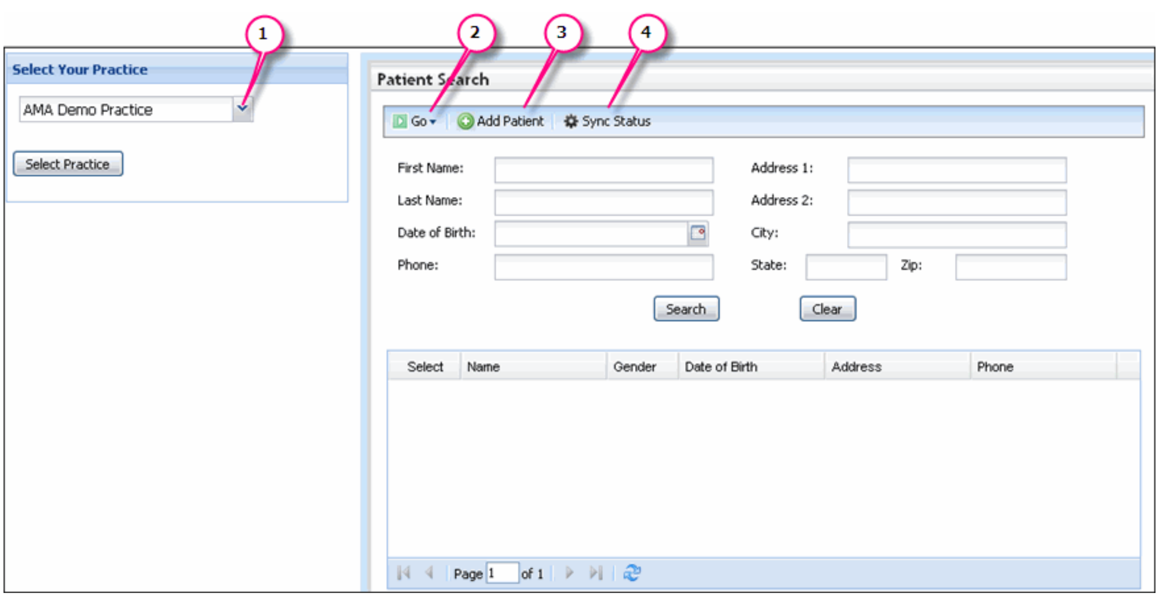
Overview: Patient Search / Sync Status Portlet

The Patient Search / Sync Status Portlet combines two powerful pieces of functionality:

- **Patient Search** enables you to manage patient data within multiple practices across multiple applications.

- **Sync Status** provides each office the option of integrating their Practice Management System to the portlet to feed data. Patient integration with search feature provides the capability for physicians to search and select a patient and launch multiple applications directly to a specific patient's record. This patient ID synchronization allows new or updated patient information to be synchronized across multiple applications.

- **About Patient Information** - If your office is connected to your Practice Management System, then that system is the source of truth, data information is pulled from the Practice Management System. You will not have the option to add or edit patient information from this portlet, and will do so in your Practice Management System. If this portlet is not connected to a Practice Management System, add and edit patient information from this portlet in order to sync the information to associated third party applications when applicable.



NUMBER	ITEM	DESCRIPTION
1	**Select Your Practice**	If your office supports multiple practices, the Practice Selector portlet enables you to search for patients across any of the practices without changing screens.
2	**Go**	The Go menu enables you to select a patient and launch multiple applications directly to that specific patient's record. If your practice is not connected to third parties, you may edit patient data from this menu.
3	**Add Patient**	If your practice is not connected to a Practice Management System, you are able to add patient information from this screen. If your office is connected to your Practice Management System, then that is the source of truth, and you will not have the option to add or edit patient information from this portlet. Do so in your Practice Management System.
4	**Sync Status**	If a practice has integrated the Practice Management System to this portlet (in order to feed data), then patient ID synchronization allows new or updated patient information to be synchronized across multiple applications. The Sync Status feature enables you to receive status on the sync, to include: • *Success* • *Failure* • *Pending*

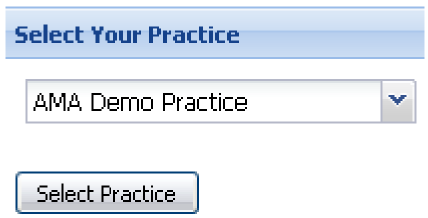
RESULT:

You have successfully reviewed an overview of Patient Search / Sync Status.

Selecting a Practice

If your office does not support multiple practices, **skip this task.**

1. Navigate to the *Select your Practice portlet*.



2. From the drop down menu, click on the *practice* for which you wish to manage patient information.

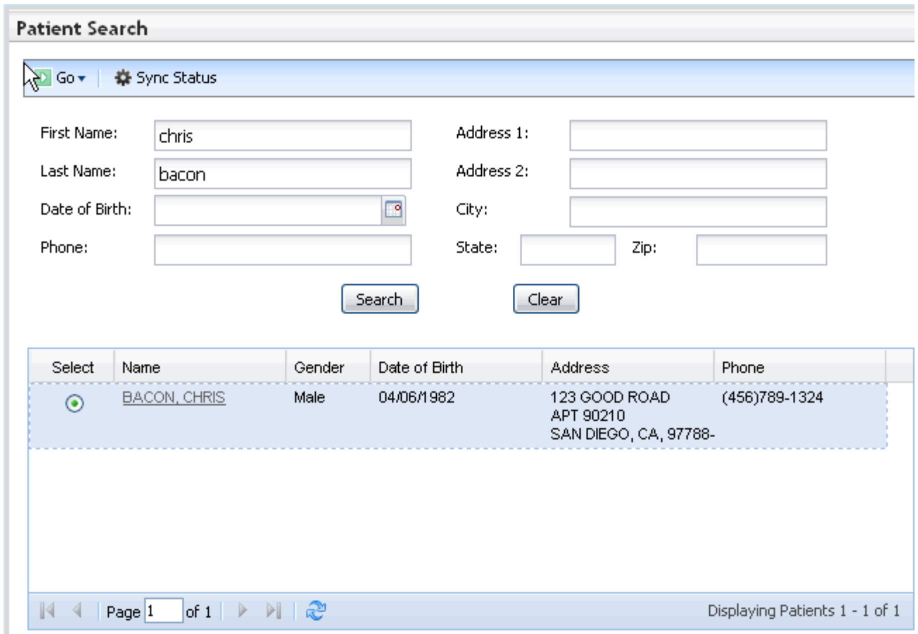
3. Click **Select Practice**. The screen refreshes, and the practice is selected.

RESULT:

You have successfully selected a practice.

Searching for a Patient

1. Select a practice (If your office does not support multiple practices, skip this step).
2. Key in the patient information search criteria, such as *Patient Name, Date of Birth*, etc., and click **Search.** The Search Results screen is displayed.



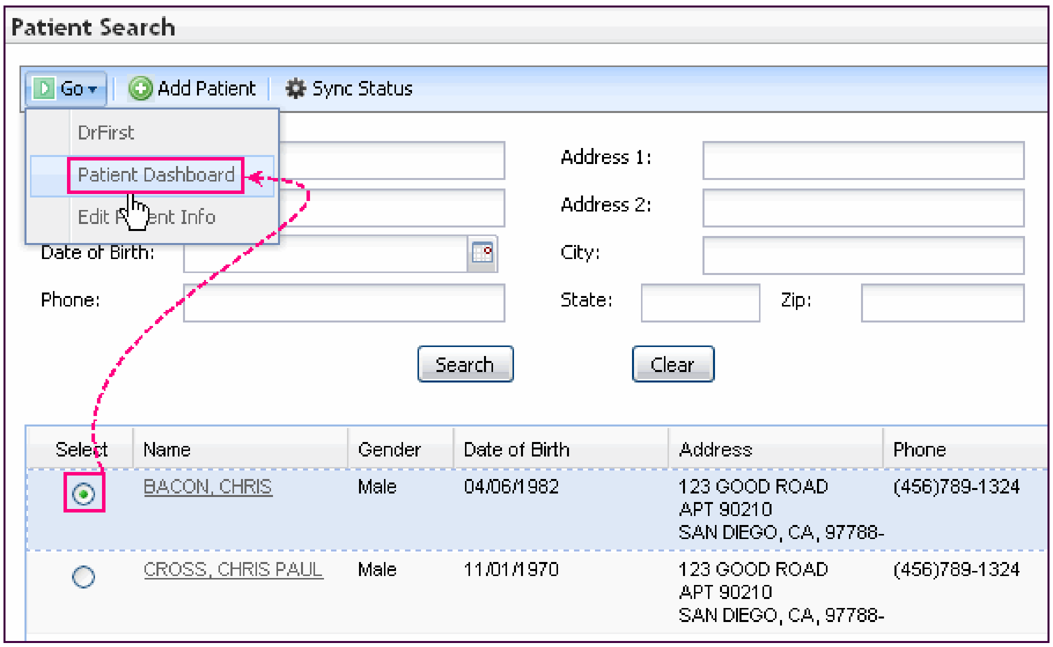
3. Enable the radio button of the targeted patient.
4. Optionally, perform one or more of the following:
   - Launch the patient dashboard
   - Launch the patient record in an application
   - Check sync status on a patient record
   - Print the patient dashboard information
   - Edit patient information (only if your practice does not have a Practice Management System connected to Covisint and is not sending real-time patient update messages)

RESULT:

You have successfully performed a patient search.

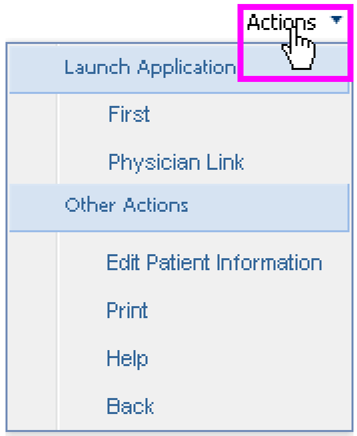
Launching the Patient Dashboard

1. Select a practice (If your office does not support multiple practices, skip this step).
2. Key in the patient information search criteria, such as Patient Name, Date of Birth, etc., and click **Search.** The Search Results screen is displayed.



3. Enable the radio button of the targeted patient.
4. From the **Go** drop-down menu, select **Patient Dashboard** to view this patient's data. The screen refreshes, and the Patient Dashboard is displayed.

5. Optionally, perform one or more of the following from the Actions drop down menu:



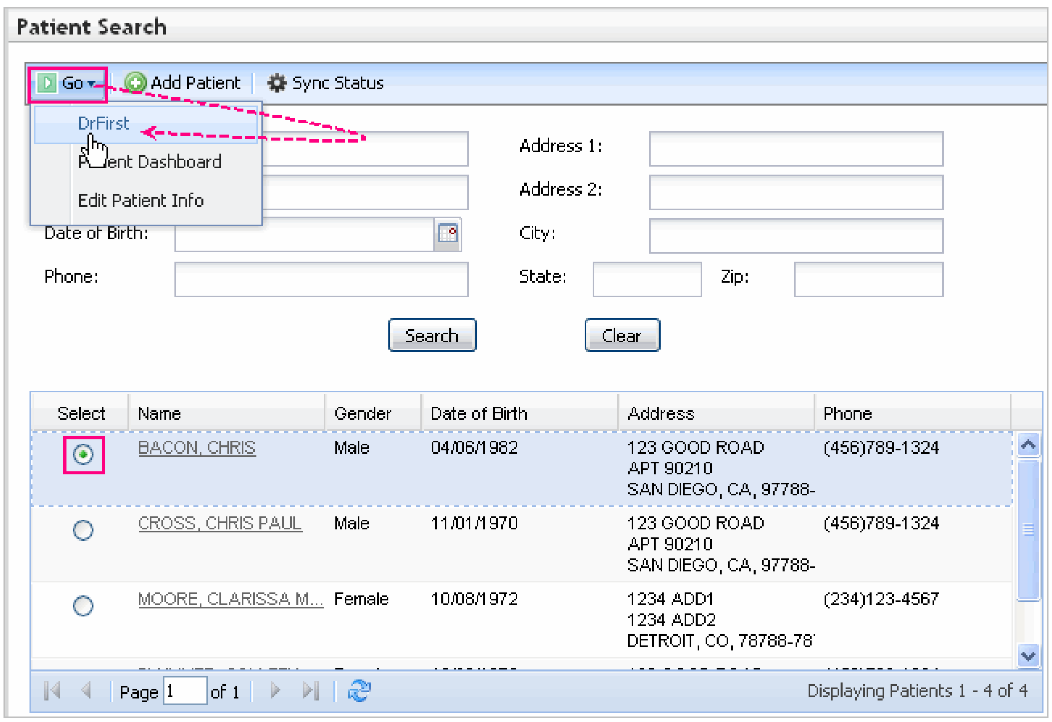
IF YOU WISH TO...	THEN:
Go back to the Patient Records screen	Click **Back** in the Actions drop down menu.
Edit Patient Information	Click **Edit Patient Information** in the Actions drop down menu.
Launch directly to a specific patient's record in a third party application	Select the ***application*** from the list in the Actions drop down menu.
Print the patient's dashboard (in PDF format)	Click **Print** in the Actions drop down menu.
Print selected information in the patient's dashboard (in PDF format)	Click **Print** in the Actions drop down menu.
Return to the main Patient Records screen	Click **Back** in the Actions drop down menu.

RESULT:
You have successfully launched a Patient's Dashboard.

Launching the Patient Record in an Application

1. Select a practice (If your office does not support multiple practices, skip this step).
2. Key in the patient information search criteria, such as Patient Name, Date of Birth, etc., and click **Search.** The Search Results screen is displayed.

If the patient you are looking for is not found, check the **Sync Status** for the patient record.



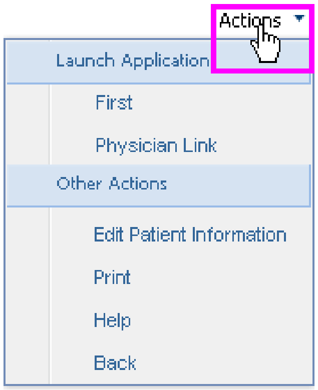
2. Enable the radio button of the targeted patient.
3. From the **Go** drop-down menu, select the application in which you wish to view this patient's data. The selected application opens in a new window and displays the Patient record.

RESULT:

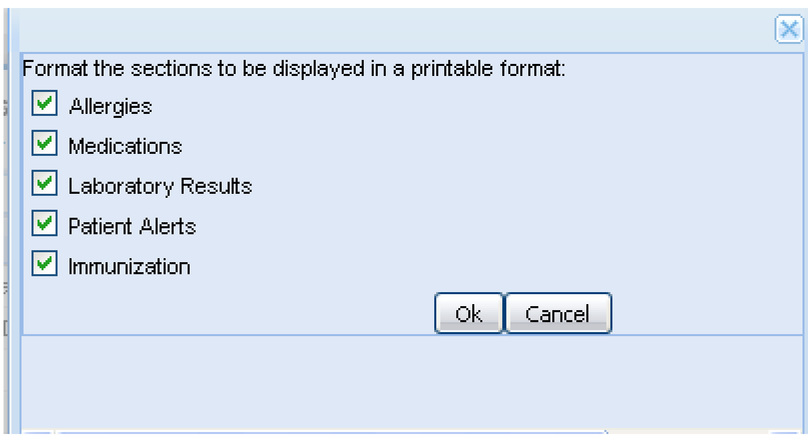
You have successfully launched a patient's record in an application.

Printing Items in the Patient Dashboard

1. Launch the Patient's Dashboard.



2. From the Actions drop down menu, click Print. The Select Print Options pop up box is displayed.



3. Enable the checkbox of each item you wish to include in the printout.
4. Click **OK**. The pop up box is closed, and the printable view is displayed in a new window (as a PDF file).
5. Click **Print** in the toolbar of the PDF file, then close the window.

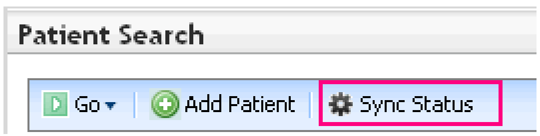
RESULT:

You have successfully printed patient dashboard information.

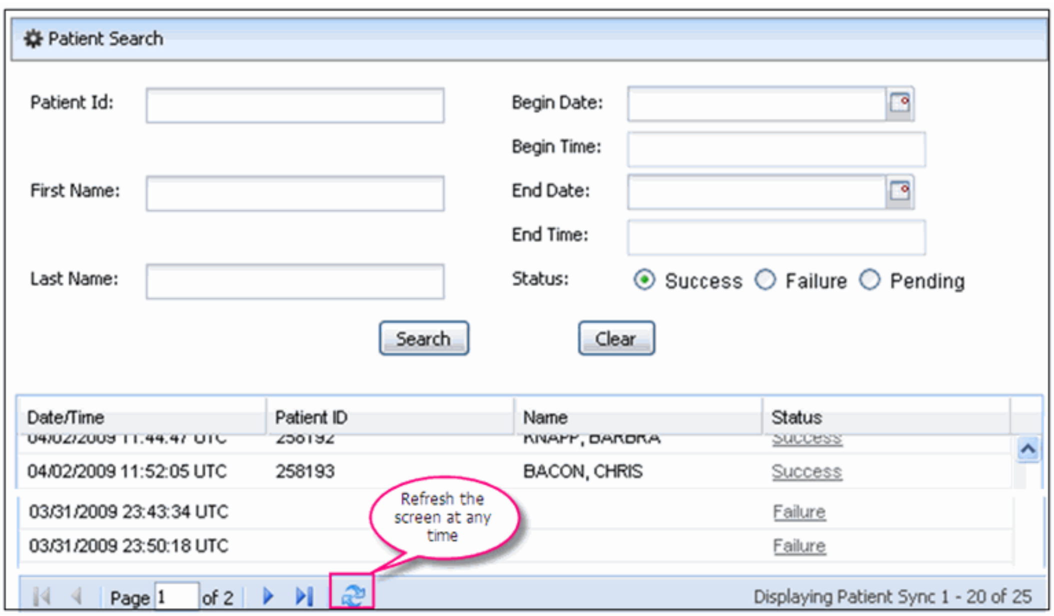
Checking Sync Status on a Patient Record

If your office does not support multiple practices, skip this task.

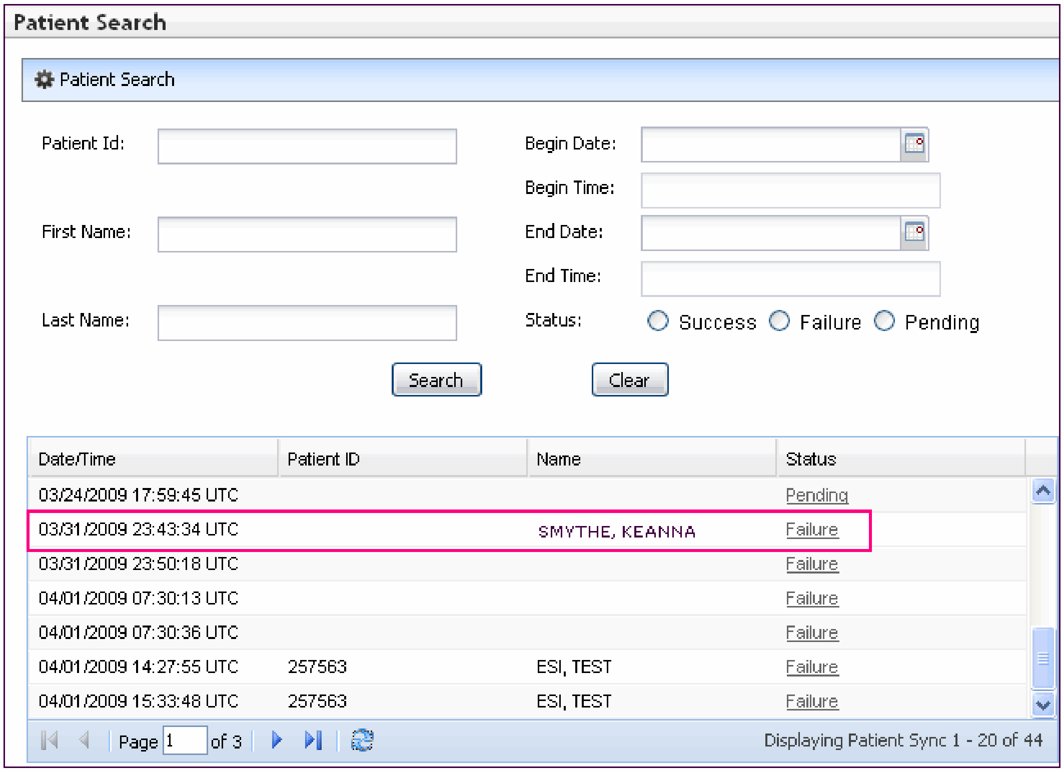
1. Select a practice (If your office does not support multiple practices, skip this step).
2. Click *Sync Status*.



3. Key in some patient data as search criteria, then click **Search**. You may opt to narrow results by selecting the status type for which you are searching: *Success*, *Failure*, *Pending*.
4. Click **Search**. The screen refreshes, and search results are displayed.



5. Optionally, for failed status, click on the word *Failure* in the Status column to view details.



6. Optionally, review steps to troubleshoot errors.

RESULT:

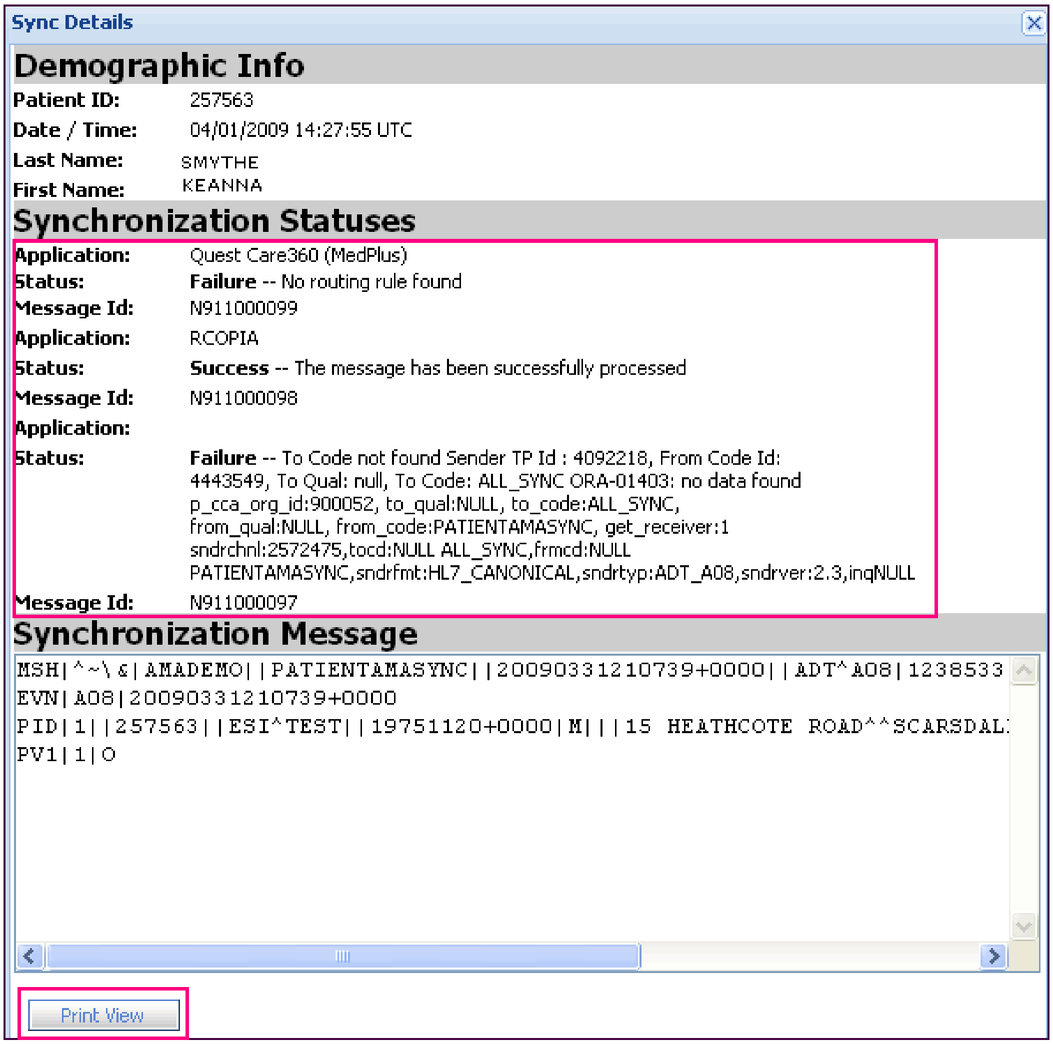
You have successfully checked sync status on a patient record.

Sync Details Screen

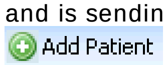
After clicking **Failure** for a given patient, the details of the sync are displayed. In this example, a sync of data was attempted to several applications. In this example:

- the sync to QuestCare360 failed, as no routing rule was found.
- the sync to Rcopia was successfully processed.

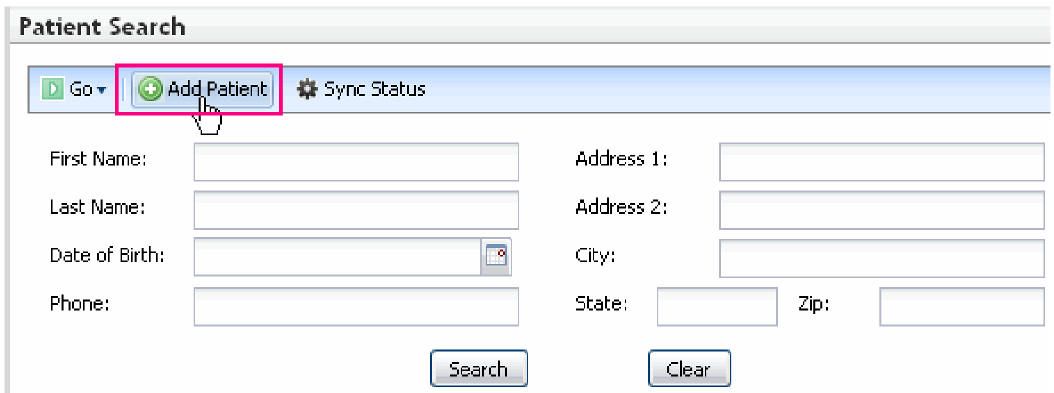
From this screen you may also click **Print View** to display this information in a printer-friendly PDF format:



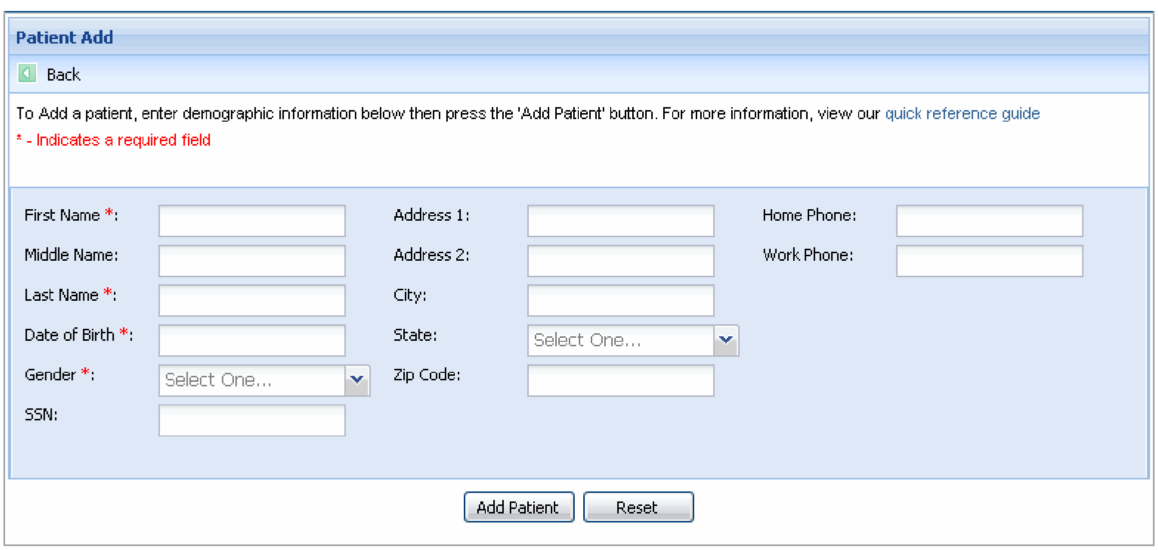
Adding New Patient Records

If your practice has a Practice Management System connected to Covisint and is sending real-time patient update messages, the 

menu option will not appear on your screen. **Skip this task.**



1. Select a practice (If your office does not support multiple practices, skip this step).
2. From the Patient Search screen, click **Add Patient.** The Add Patient Demographics screen is displayed.



3. Key in patient information as *required* in the open text boxes.
4. Click **Add Patient**.

5. Click **OK** in the confirmation box to add the patient record. The screen refreshes, and a message confirming the new record has been successfully created is displayed.
6. Click 

to go back to the Patient Search screen.

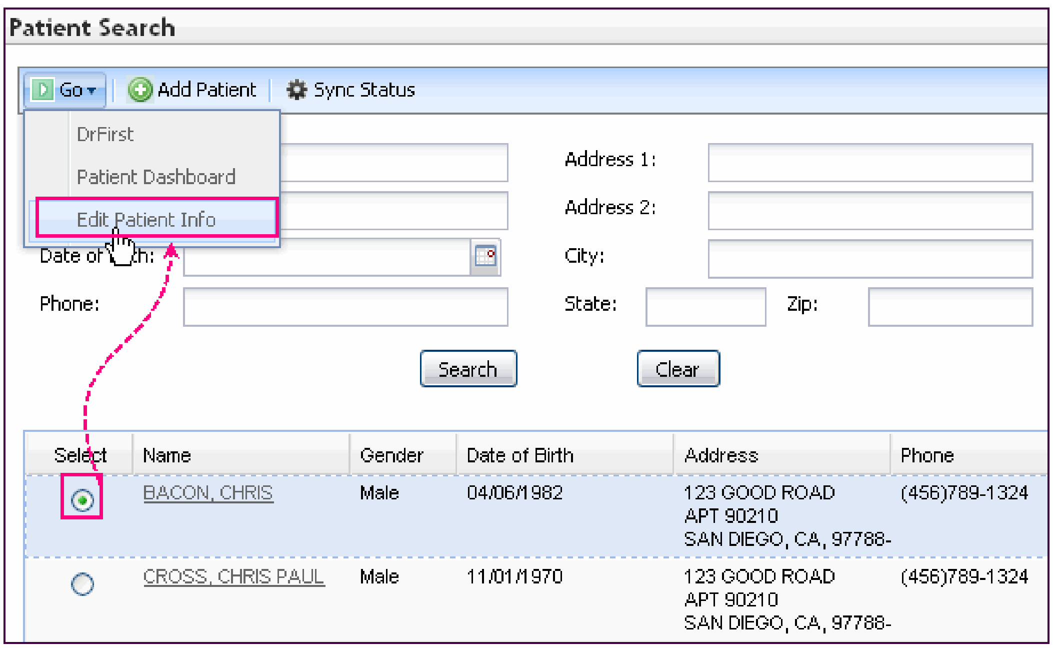
RESULT:

You have successfully added a new patient.

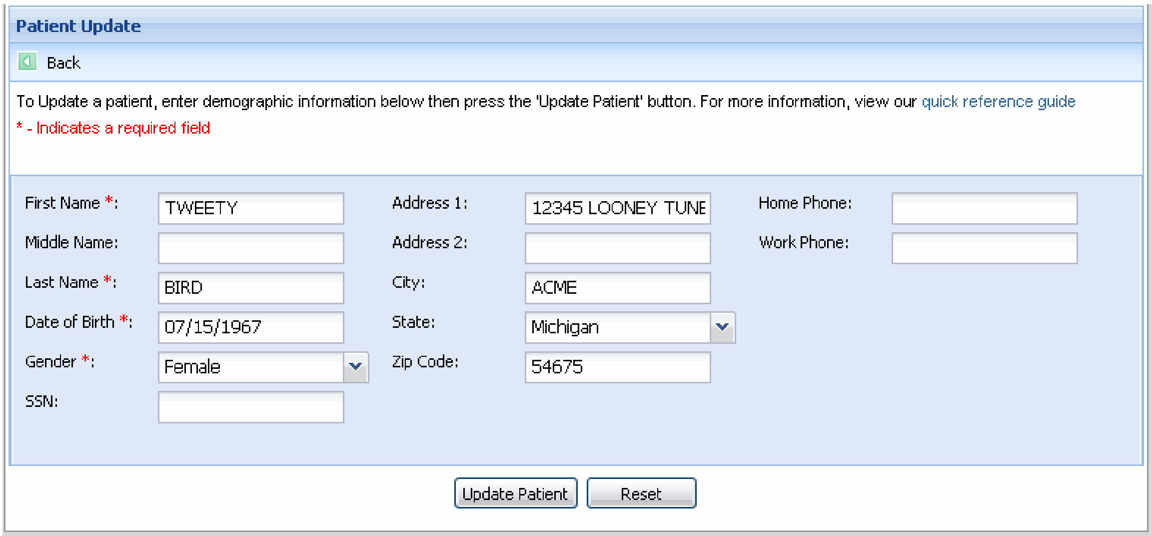
Editing Patient Information

If your practice has a Practice Management System connected to Covisint and is sending real-time patient update messages, Edit Patient Info will not appear as an option under the Go menu. **Skip this task.**

1. Select a practice (If your office does not support multiple practices, skip this step).
2. Key in the patient information search criteria, such as Patient Name, Date of Birth, etc, and click **Search.** The Patient Search Results screen is displayed.

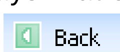


3. Enable the radio button of the patient record you wish to update.
4. Click **Edit Patient Info** from the Go menu. The *Patient Update screen* displays the patient record for updating.



5. Modify patient data as desired.

6. Click **Update Patient**. The screen refreshes, and the confirmation message displays "Patient successfully updated".

7. Click 

to go back to the Patient Search screen.

RESULT:

You have successfully edited a patient's information.

Troubleshooting Errors

The following are some examples of common failure types, and the actions required to correct the failures. This is not a comprehensive list of error types.

Failure / Error Type	Cause of Error	Action(s) for Resolution
Formatting	This failure occurred because the Social Security Number was formatted incorrectly. The back-end applications expect the format to be 999-99-9999.	If practice is capable of correcting the format in the PMS then once the patient record is updated a new patient message will be generated that is sent to Covisint and then forwarded to all back-end applications.
Required Field - Date of Birth (DOB) Missing	This is an example of the Date of Birth is required by DrFirst (Rcopia).	Practice enters the DOB in the PMS. Once this update occurs the message will be sent to Covisint and forwarded to DrFirst (Rcopia).
Required Field - Policy Number Missing	The top failure occurred as a result of the Policy Number missing in the HL7 data which is a required field for 4Medica.	Practice enters policy number in PMS and an updated message is generated that Covisint will forward on to 4Medica.
Required Field - Name of Insured Missing	The failure occurred as a result of the Name of the Insured missing in the HL7 data which is a required field for DrFirst (Rcopia).	Practice enters name of insured in PMS and an updated message is generated that Covisint will forward on to DrFirst (Rcopia).

Glossary

F

failure status: data did not successfully sync to one or more associated applications. View the failure message to edit and resubmit.

P

patient search: enables you to manage patient data within multiple practices across multiple applications.

pending status: data sync has not totally completed processing.

PMS: Practice Management System

S

success status: data has successfully performed a sync to all appropriate systems

sync: This is a patient ID synchronization which allows new or updated patient information to be synchronized across multiple applications.

sync status: provides each office the option of integrating their PMS to the portlet to feed data. Patient integration with search feature provides the capability for physicians to search and select a patient and launch multiple applications directly to a specific patient's record. This patient ID synchronization allows new or updated patient information to be synchronized across multiple applications.