HealtheConnections Health Information Exchange (HIE) User Guide

HealtheConnections Health Information Exchange (HIE) securely stores and shares patient medical information among a patient's care team using intelligent platforms, innovative tools, and targeted information delivered right to you. This means better communication, more coordinated care, and reduced gaps, helping providers deliver the best possible outcomes for patients.

Authorized user accounts are required to access the HIE. The Authorized User Request Form must be completed and submitted for review and approval by HealtheConnections and the associated organization. Any individual accessing the HIE is required to:

- Have an account with unique login credentials
- Not share their username, password, or authentication tools with others
- Not use the login credentials of others
- Access only the minimum amount of health information as is necessary for their professional need

The HealtheConnections HIE user guide walks users through key features, showing how to access patient records, manage alerts, and view labs and results to support informed decision-making. For help or additional information, contact HealtheConnections.

The quick links below allow users to jump directly to the sections most relevant to their needs.

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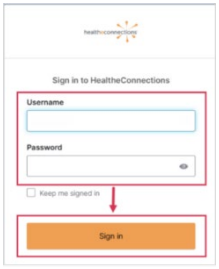
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HealtheConnections HIE Login

Access the HealtheConnections HIE portal at https://www.healtheconnections.org/, click the HIE Portal Login button in the top right corner.



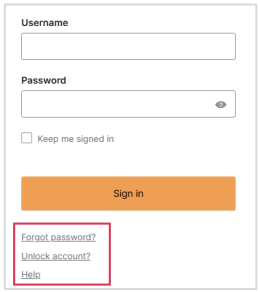
A new window will open to https://portal.prod.healtheconnections.org.



At the HIE portal login screen, enter the assigned HealtheConnections Username and Password. Click Sign In, then complete the standard Multi-Factor Authentication (MFA) process.

Password Reset/Account Unlock

To reset a password or unlock an account, utilize the self-service options located below the Sign in button. Select the appropriate link (Forgot password or Unlock Account) and follow the on-screen prompts. Once completed, an email will be sent from noreply@okta.com with instructions. The email may be delivered to a Junk or Spam folder.



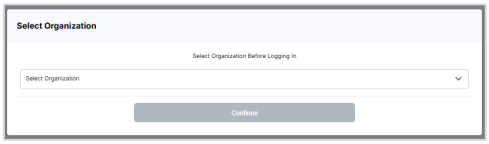
If the email is not received, contact the HealtheConnections at support@healtheconnections.org or 315.671.2241 x 5 for assistance.

HIE Access

Authorized user accounts are required to access the HIE. The Authorized User Request Form must be completed and submitted for review and approval by HealtheConnections and the associated organization.

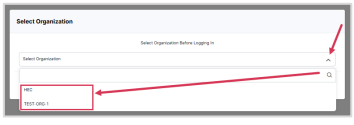
Authorized Users Working at Multiple Organizations

For authorized users associated with more than one organization, a selector screen appears upon login. The organization corresponding to the clinical patient records being accessed must be selected.

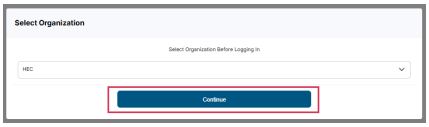


Important: Selecting an incorrect organization constitutes unauthorized access, as patient consent applies only to the organization where it was granted. Unauthorized access may result in sanctions.

To select the appropriate organization, click the dropdown arrow. All organizations assigned to that authorized user will populate. Select the appropriate organization.



Once the correct organization is selected and displayed in the window, click Continue to access the portal.

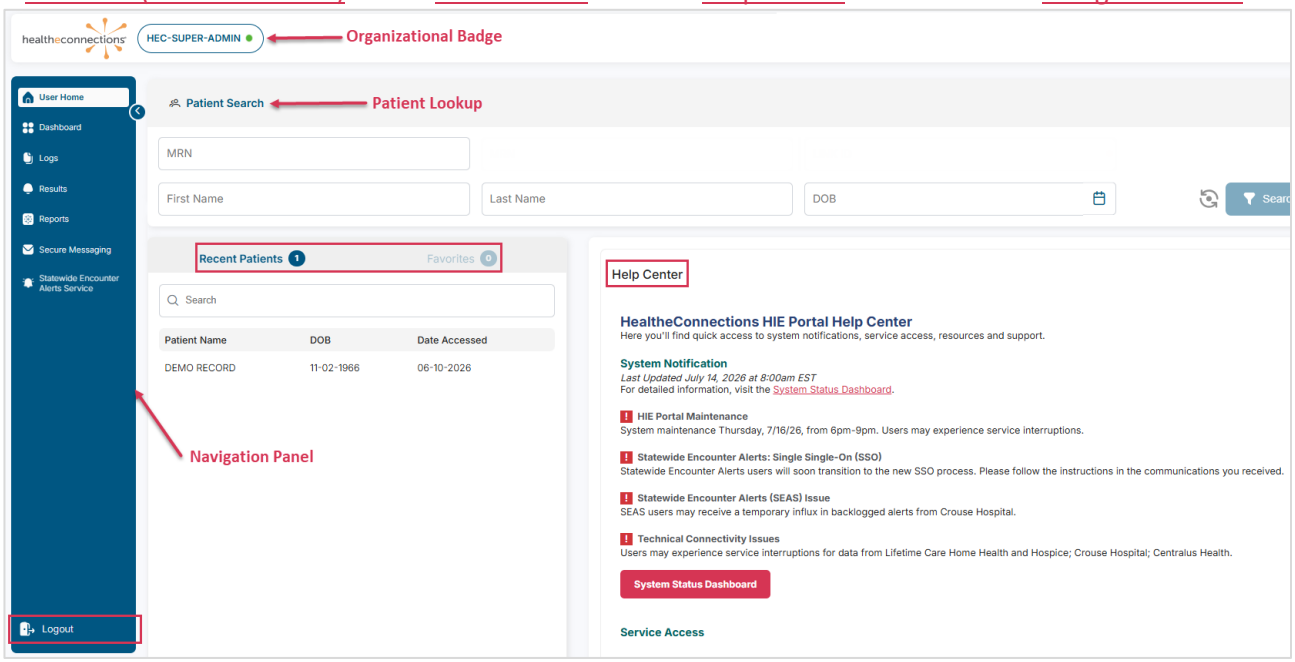


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User Dashboard

After logging in, an authorized user is directed to the User Dashboard. Multiple navigation options are available, including:

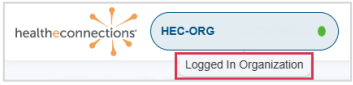
- Organization Badge
- Account Profile
- Patient Search (Lookup)
- Recent Patients
- Favorites (Pinned Patients)
- Notifications
- Help Center
- Navigation Panel



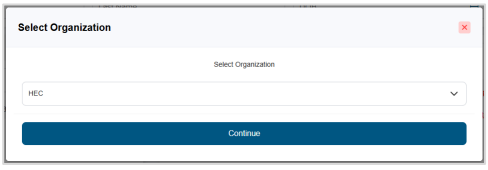
Note: Some services (e.g., Patient Search (Patient Lookup)) appear on the User Dashboard; however, access is granted only if the appropriate provisions have been assigned.

Organization Badge

Indicates the organization the authorized user is currently logged in under. Hovering over the badge highlights this information.



This is important for authorized users working with multiple organizations. If an incorrect organization was selected at login, click the badge and follow the same steps used during initial sign-on. Click the dropdown menu, select the correct organization, then click Continue.



Important: Authorized users must view patient information under the organization corresponding to the clinical record being accessed. Selecting the wrong organization constitutes unauthorized access, as patient consent applies only to the organization where it was granted. Unauthorized access may result in sanctions.

Account Profile



The Account Profile section displays your name and last login.

Demo Mode is available here. To access Demo Mode, click the dropdown arrow. In Demo Mode, Protected Health Information

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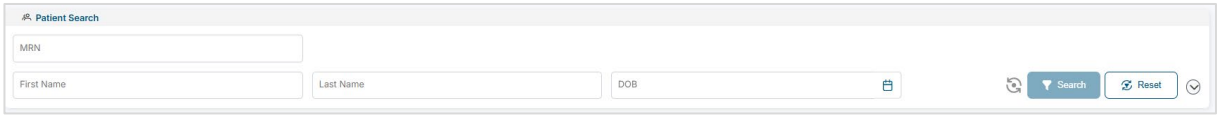
(PHI) is hidden, which is ideal for training purposes. Use the toggle button to turn Demo Mode on and off.

Patient Search (Patient Lookup)

Patient Search, commonly known as Patient Lookup, opens the patient query screen.

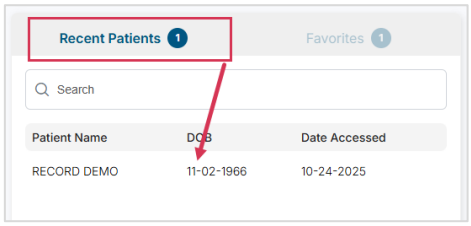
Searches must be performed by:

- Demographics (First Name, Last Name, and Date of Birth (DOB))
- Identifiers (Medical Record Number, MRN)



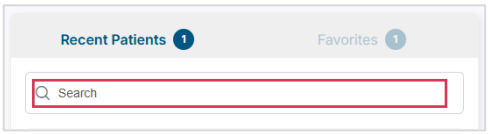
Click here for instructions on navigating Patient Search.

Recent Patients



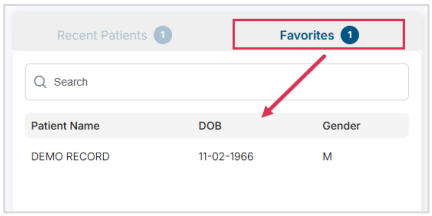
Recent Patients displays the most recently searched patients, allowing quick access to previously viewed records.

- This list does not reset after each login.
- It holds up to 25 patients.
- New searches replace the oldest entries.
- Records can also be located using the search feature.



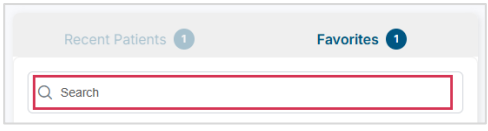
Important: If you are authorized to work with multiple organizations, note that this view does **not** reset based on the organization selected. Always ensure you are selecting patients under the organization that matches the clinical record you are accessing. Patient consent applies only to the organization where it was granted. Unauthorized access may lead to sanctions.

Favorites (Pinned Patients)



Specific patients can be pinned with a star within the Patient Synopsis for quick access.

- This list does not reset after each login.
- It holds up to 50 patients.
- To add or remove patients at any time, click the star icon.
- Records can also be located using the search feature.



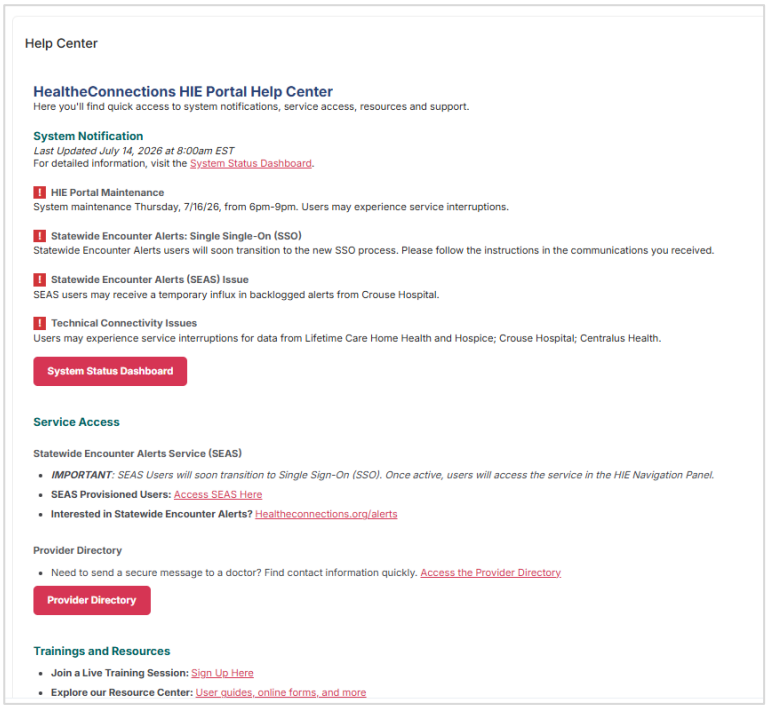
Important: If you are authorized to work with multiple organizations, note that this view does **not** reset based on the organization selected. Always ensure you are selecting patients under the organization that matches the clinical record you are accessing. Patient consent applies only to the organization where it was granted. Unauthorized access may lead to sanctions.

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Help Center

The Help Center provides resources to support authorized users.

- Quick links are available for quick access to resources, important news, and HealtheConnections contact information.
- The Statewide Encounter Alerts service is accessible here for enrolled users.
- Content changes, so check this section regularly.

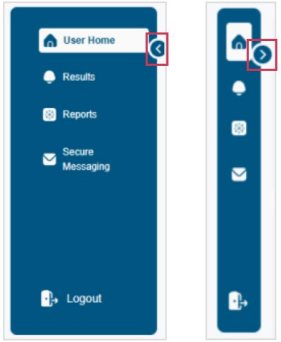


Navigation Panel

The navigation panel on the left displays a list of provisioned services.

- Selecting a service grants access to its features.
- Click on the expand/collapse button to change the screen view.
- Logout is located at the bottom-left corner. Always Log Out rather than closing the application to maintain security. After logging out, the browser or application can be closed safely.

Expanded View Collapsed View



Click here for instructions on navigating Services.

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Patient Search Navigation

Authorized User Access

Patient Lookup Access Type identifies the primary account type that is provisioned for an individual once access is approved.

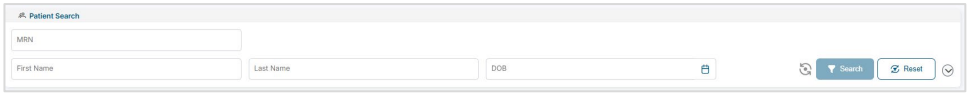
Note: Patient Lookup will appear on the User Dashboard. Access is granted only if the appropriate provisions have been assigned.

Patient Search (Patient Lookup)

Patient Search, also referred to as Patient Lookup, opens the patient query screen.

Patient searches can be performed by:

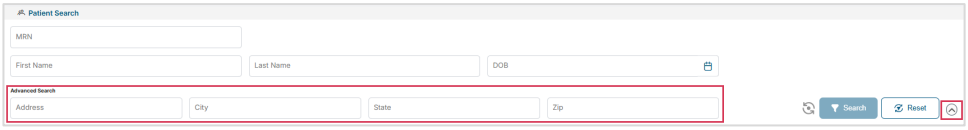
- Demographics: First Name, Last Name, and Date of Birth (DOB)
- Identifiers: Medical Record Number (MRN)



Required fields are marked with an asterisk (*). These will populate as content is entered.



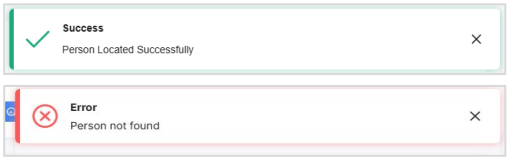
Additional fields such as Address, City, State, and Zip may be used to refine search results but are not required. These fields are available by clicking the dropdown.



Patient Search (Patient Lookup) Search Results

After completing a patient search, the system provides one of two prompts in the upper-right corner of the screen:

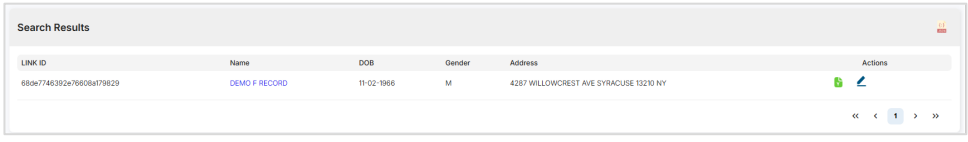
- Patient Found: A confirmation message displays if a match exists
- Patient Not Found: An error message displays if no match is found.



Search Results

Displays a list of patients matching the search criteria using Verato (MPI system). Results include:

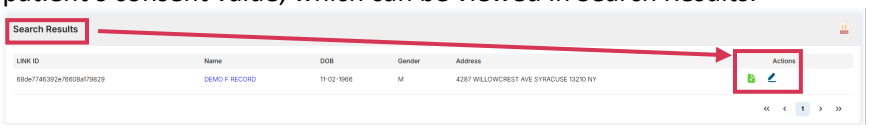
- LINK ID: HealtheConnections Patient Identifier
- Patient Demographics: Name, Date of Birth, Gender and Address
- Consent Values: Options include reviewing consent and changing/adding consent
- Actions: Includes Minor Consent Override and Break the Glass



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Consent: Access

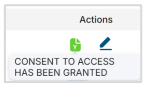
Before accessing a patient's record, consent must be reviewed or obtained. Access is determined by the patient's consent value, which can be viewed in Search Results.



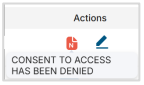
Consent: Values

Hover over the consent value icon to review the patient's consent selection.

- Yes (green with Y): Patient has given consent. Access to the record is allowed.



- No (red with N): Patient has denied consent. Access to the record is denied until a new affirmative consent is signed.



- Emergency Only (red with E): Patient has denied consent except in the case of a medical emergency. Access has been denied unless the user has Break the Glass (BTG) privileges, **and** it is a truly emergent situation.



Consent: Actions

Hover over the consent action icon to review the actions available based on user access type.

- Break the Glass (yellow): Only for organizations providing emergency treatment. Access is granted to authorized users approved by the RHIO Administrator. Click here for instructions on Break the Glass.



- Minor Consented Services Override (yellow): Only for organizations providing Minor Consented Services. Click here for instructions on Minor Consented Services Override.

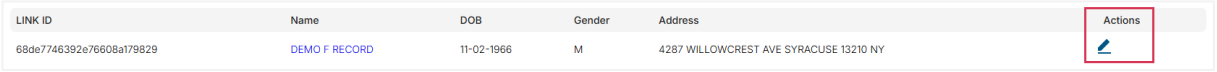


- Add/Change Consent Value (pencil): No consent exists **OR** patient has changed their consent value on the organization-specific consent form.

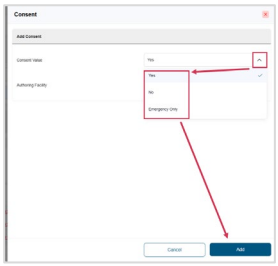


Consent: Adding/Changing Values

To add or change a consent value, click the consent add (pencil) icon in Search Results under Actions.



Select the appropriate consent value (Yes, No, Emergency Only) from the drop-down menu based on the consent choice indicated on the organization-specific consent form. Click Add to save the value.

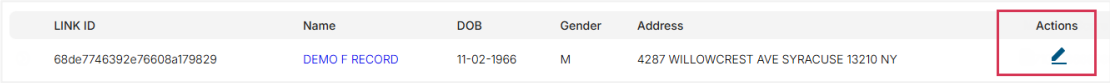


⚠️ **Important**: *Only designated organizations should select Emergency Only. Click here to learn which organizations are designated.*

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Example: Adding Consent
In the example below, the patient gave affirmative consent. This will add the green CONSENT TO ACCESS HAS BEEN GRANTED icon in front of the pencil.

Step 1: No consent on file
Click the consent add (pencil) icon. From the consent value-dropdown, select Yes, click Add.



Step 2: Consent on file
After completing Step 1, the Yes consent value will display.



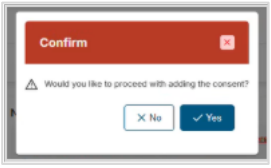
Designated Organizations and Emergency Only Consent
Organizations that routinely handle medical emergencies, such as EMS or hospitals with emergency departments, are considered designated and may select the Emergency Only consent value.
Learn more about emergency access (break the glass) on our Resource Center webpage.

Consent: Break the Glass (Emergency Only)
For organizations providing emergency treatment only. Access is granted to authorized users approved by the RHIO Administrator.



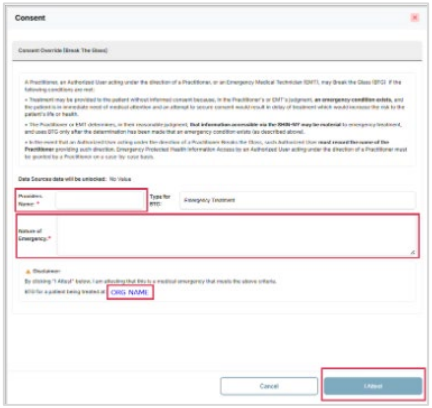
To break the glass for a patient with no consent on file, click the patient's name. A pop-up message will appear:

- Click Yes to add a consent value.
- Click No to proceed with Break the Glass emergency access.

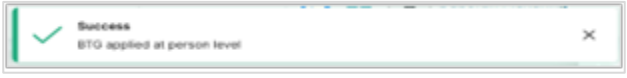


If No (Break the Glass) is selected by an authorized user at an eligible organization, additional attestations are required. If selected:

- A Consent Override (Break The Glass) window will appear.
- Enter the Provider Name and Nature of Emergency.
- Review the on-screen instructions to complete the emergency access workflow.
- Select I Attest to unlock consent and access the patient record.
- Note: Organizations are identified on this consent (e.g., BTG for a patient being treated at: ORGANIZATION NAME). All consent overrides are subject to audit.



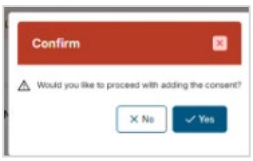
Upon successful access, confirmation appears in the upper-right corner of the screen, and access to Patient Synopsis is granted.



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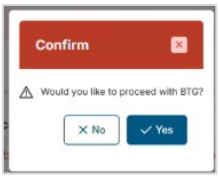
Consent: Minor Consented Services Override

To add a Minor Consented Services Override for a minor patient that does not have a consent on file **OR** has a No consent value, click the patient's name. A pop-up message will appear:



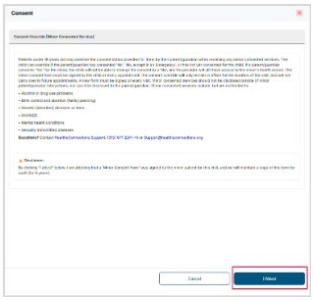
- Click No to proceed to the Minor Consented Services Override.
- Click Yes to add a consent value from a parent/guardian.

Once No is selected an additional pop-up message will appear:



- Click No to add a Minor Consented Services Override and follow the prompts in the next step.
- Click Yes if this is a Break the Glass (Emergency Only) request. Follow the prompts in the Consent Override (Break The Glass) window.

If No (Minor Consented Services Override) is selected, additional attestations are required. If selected:



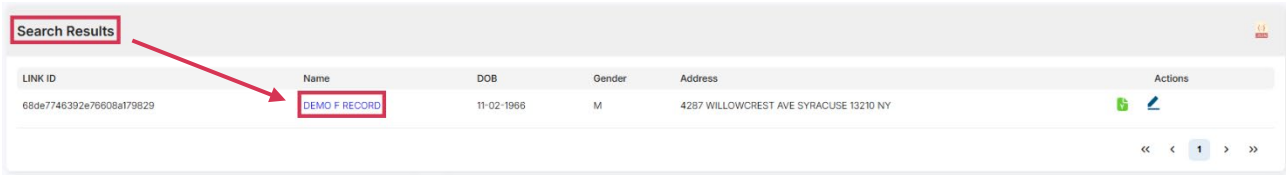
- A Consent Override (Minor Consented Services) window will appear.
- Review the on-screen instructions.
- Select I Attest to unlock consent and access the patient record.

For more information on Minor Consented Services Override Access, click here.

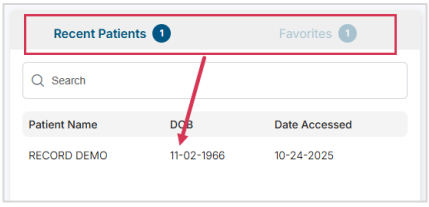
Patient Synopsis: Access

Once the patient has been correctly identified and consent has been reviewed or obtained (with a value that allows access), proceed to Patient Synopsis. There are multiple ways to access it:

From Search Results, click the highlighted patient name.



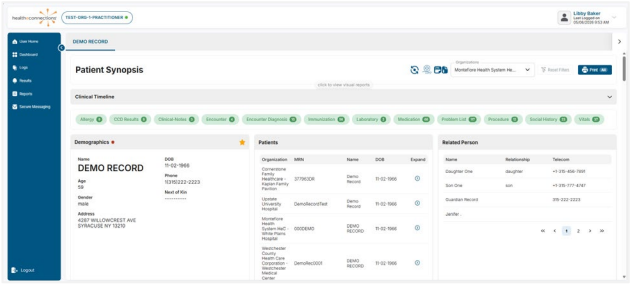
From Recent Patients or Favorites (Pinned), click on the patient name.



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Patient Synopsis Overview

After a patient is selected, the Patient Synopsis page displays the patient's clinical record.



⚠ **Important**: ***The layout of Patient Synopsis may be updated*.** It is recommended to use the Patient Synopsis Features quick links below rather than relying solely on the screenshot as a reference.

Patient Synopsis Features

- Health-Related Social Needs (HRSN) Data
- Statewide Patient Record Lookup (sPRL)
- Imaging Viewer
- Clinical Timeline
- Quick Link Tags
- Demographics
- Patients
- Related Person
- Encounters
- Encounters – Last 6 months
- Most Recent Encounters
- Allergies
- Laboratory Results / CCD Results & Procedure Reports
- Procedure
- Vitals
- Mental Status
- Social History
- Medications
- Immunizations
- Problem List / Encounter Diagnosis
- Diagnostic Reports / Clinical Notes / Source CCDs (includes Image Viewing and Transfer to PACS)

Health-Related Social Needs (HRSN) Data

Displays clinical information related to the patient's health-related social needs (HRSN) screenings, assessments, and referrals. Access by clicking the HRSN Details icon at the top of Patient Synopsis.



Statewide Patient Record Lookup (sPRL)

A secure search tool to retrieve individual patient records from across the state after patient consent is obtained. Access this information by clicking the sPRL icon at the top of Patient Synopsis.



Imaging Viewer

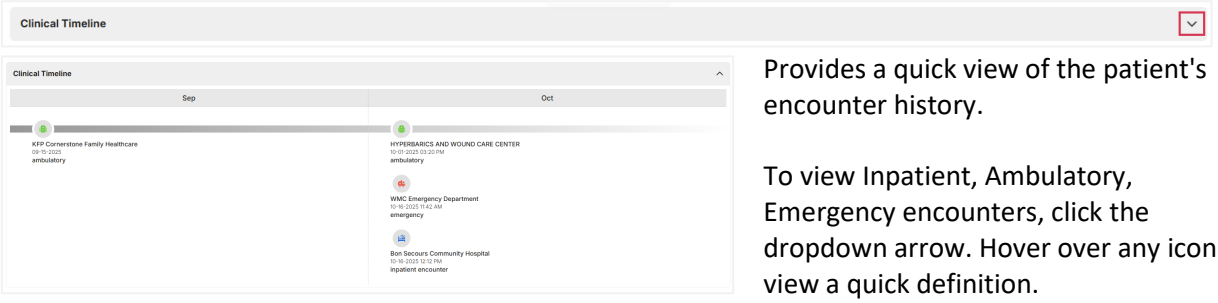
View all images related to the patient in the imaging platform. Organizations and Authorized Users configured for Transfer to PACS (TTP) capabilities can transfer images to PACS from the imaging platform. Access this information by clicking the Imaging Viewer icon at the top of Patient Synopsis.



⚠ **Important:** Organizations not configured for TTP, can view available images in Diagnostic Reports.

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Clinical Timeline



Provides a quick view of the patient's encounter history.

To view Inpatient, Ambulatory, Emergency encounters, click the dropdown arrow. Hover over any icon to view a quick definition.

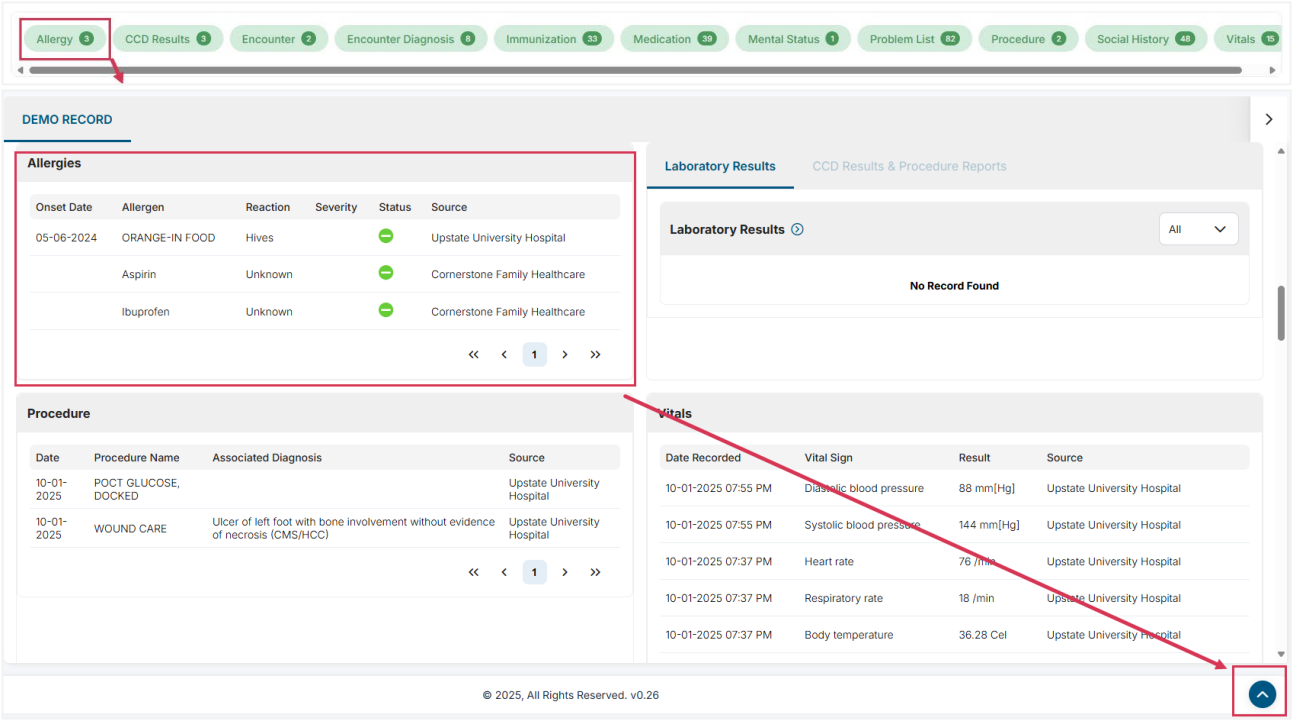
Quick Link Tags



For easy navigation, quick link tags provide direct access to sections of the patient record. If a quick link tag is not available, no record exists for that section. This will be indicated within the corresponding section of the record with No Record Found.

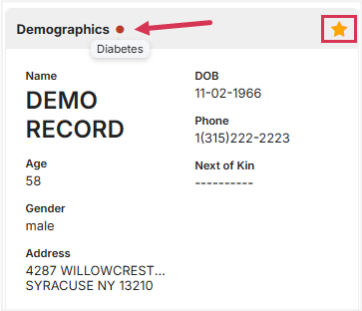
Click on the quick link tag to jump to the related section of the patient record.

- In the example below, Allergy identifies three (3) clinical records.
- Selecting this tag jumps you to the corresponding section.
- For quick access to the top of the record, click the return to top icon in the lower-right corner of the screen.



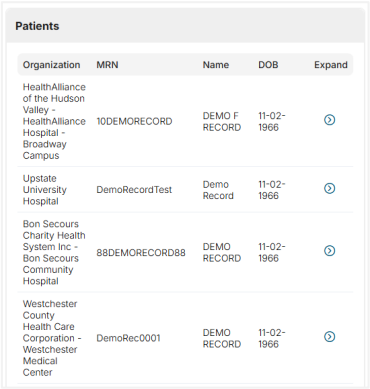
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Demographics

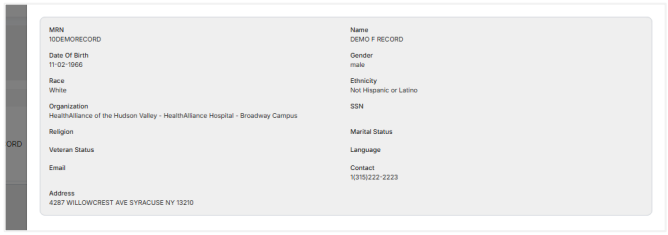


- Includes patient demographics (e.g., Name, Age, Gender, Address, DOB, Phone, Next of Kin).
- Important clinical problems may be indicated next to the title. Hover over the problem or result icon to view the associated problem.
- Click the star icon to pin the patient to your Favorites (Pinned Patients) for easy access anytime on the User Dashboard.

Patients



- Provides information on where the patient has received care for those organizations contributing data to HealtheConnections.
- The expand and collapse feature is available for additional data.

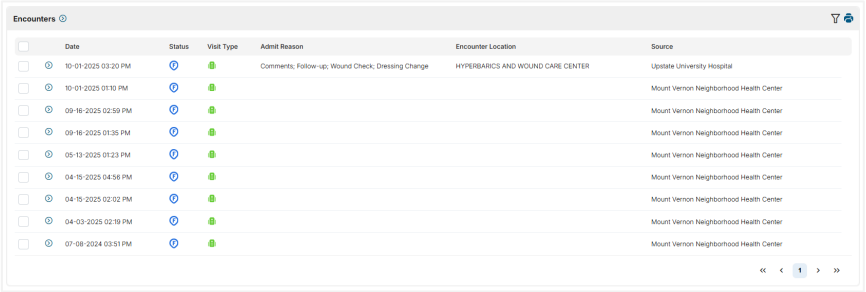


Related Person



- Provides details on contacts related to the patient (e.g., Name, Relationship, Phone Number).

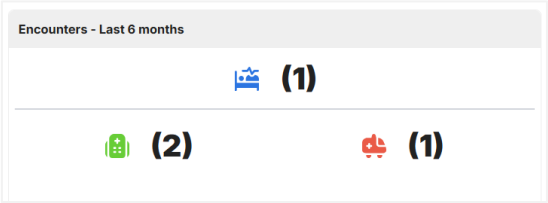
Encounters



- Shows all patient encounters.
- The expand and collapse feature is available for additional data.

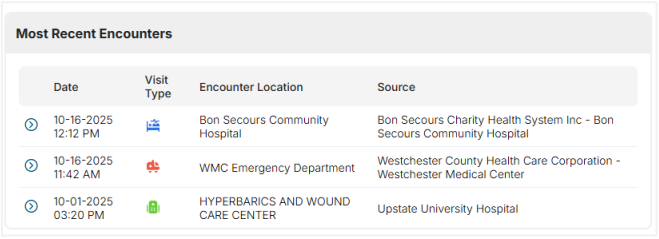
Encounters – Last 6 months

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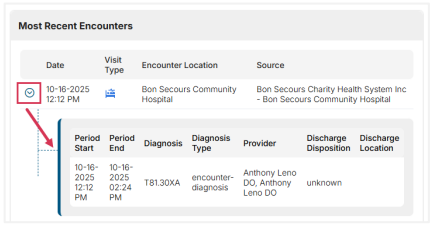


- Displays a count of encounters over the past six (6) months. Encounter icons include:
  - Inpatient (blue)
  - Ambulatory (green)
  - Emergency (red)

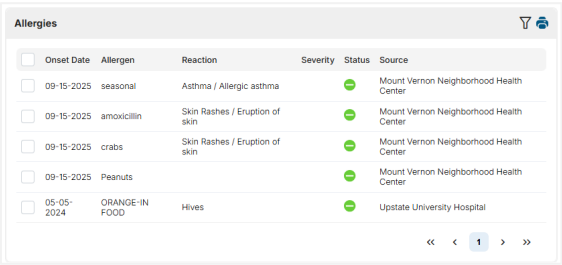
Most Recent Encounters



- Shows the three most recent encounters for this patient.
- The expand and collapse feature is available for additional data.



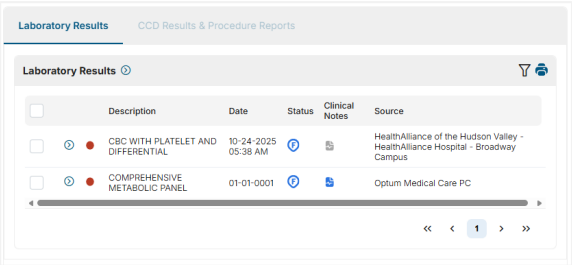
Allergies



- Displays clinical information related to the patient's allergies. Hover over the icons to see details.

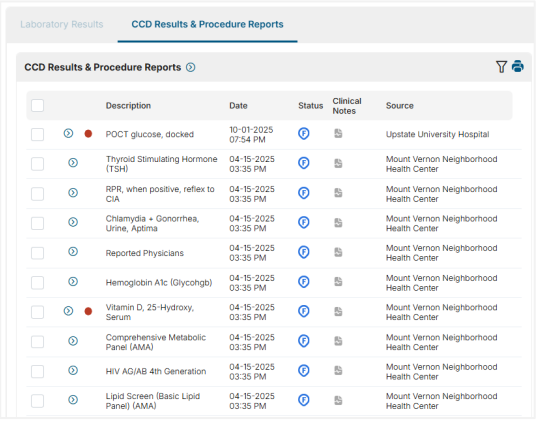
Laboratory Results and CCD Results & Procedure Reports

- Displays clinical results and reports within two (2) tabs. Refer to both tabs for results and reports.



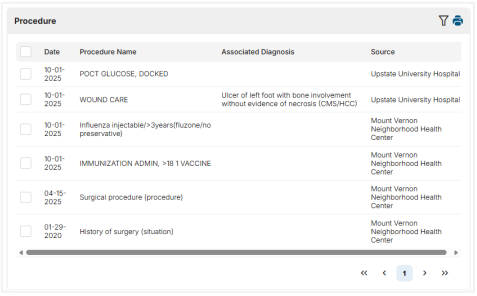
- Click Laboratory Results to view details.
- The expand and collapse feature is available for additional data.
- If notes are available, click the clinical notes icon.

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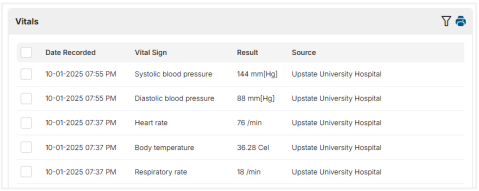
- Click CCD Results & Procedure Reports to view details.
- The expand and collapse feature is available for additional data.
- If notes are available, click the clinical notes icon. To close the window, click X.

Procedure



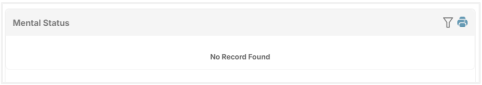
- Displays clinical information related to the patient's procedures and associated diagnoses.

Vitals



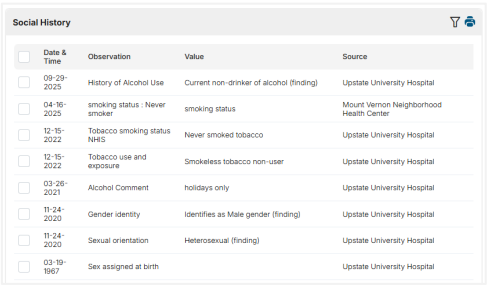
- Displays clinical information related to the patient's vital signs.

Mental Status



- Displays clinical information related to the patient's mental status.

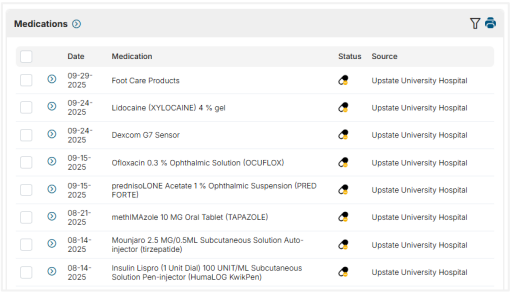
Social History



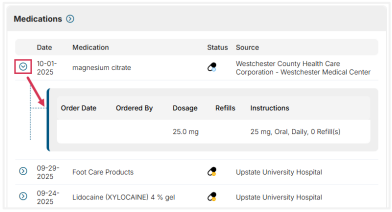
- Displays clinical information related to the patient's social history.

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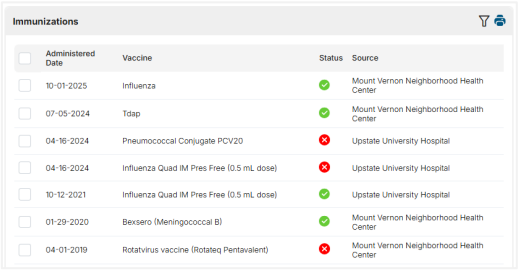
Medications



- Displays clinical information related to the patient's medication.
- The expand and collapse feature is available for additional data.



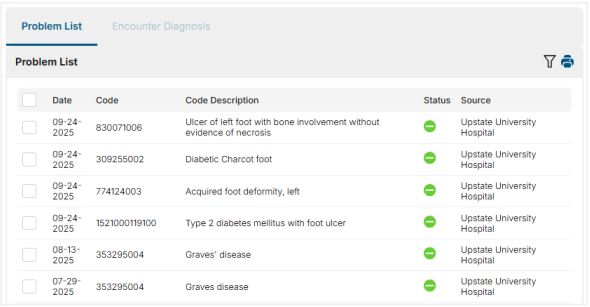
Immunizations



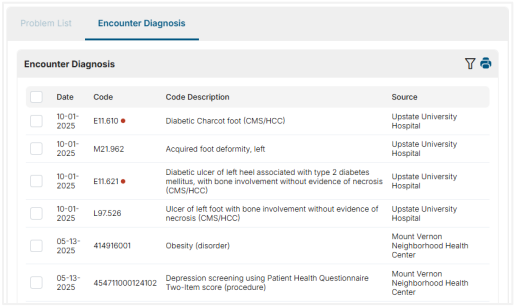
- Displays clinical information related to the patient's immunization record.

Problem List and Encounter Diagnosis

- Displays clinical information related to the patient's diagnosed problems.
- Click the Problem List to view details.

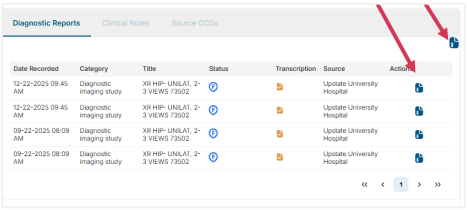


- Click the Encounter Diagnosis to view details.



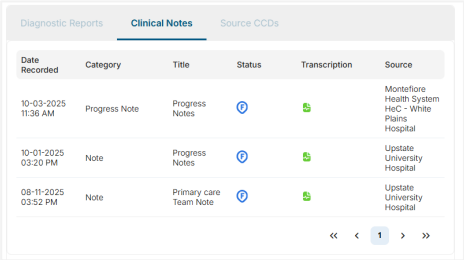
Diagnostic Reports, Clinical Notes and Source CCDs (includes Image Viewing and Transfer to PACS)

- Displays the patient's diagnostic and clinical reports, including imaging.

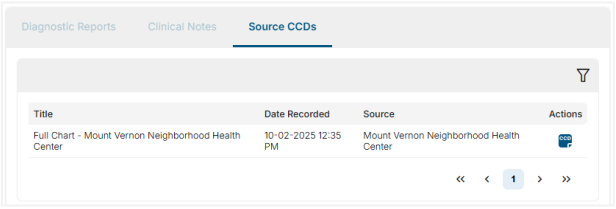


- Click on Diagnostic Reports to view details.
- Click the transcription icon for details.
- If available, Imaging Viewer icon appears under Actions. The icon will be grayed out if an image is not available.
- To view all images or transfer images to PACS (TTP), select the view all imaging icon in the top-right corner.

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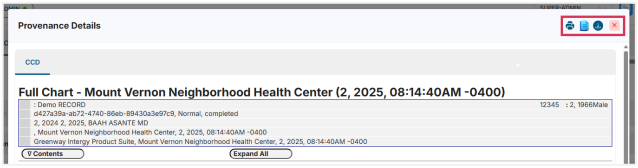
- Click on Clinical Notes to view details.
- Click the transcription icon for details. Click X to close.



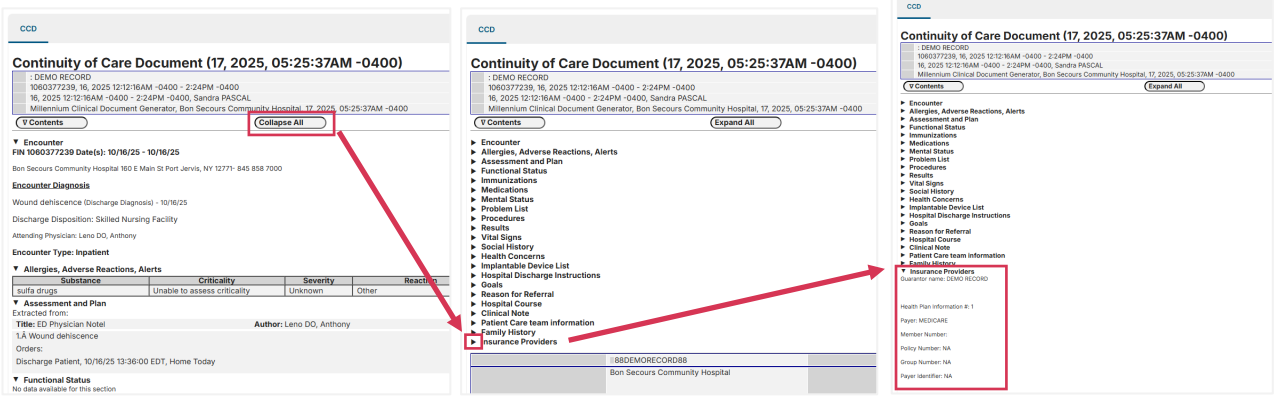
- Click on Source CCDs to view details.
- If Continuity of Care Documents (CCDs) are available, click the CCD icon for details.



- CCDs are available to print and download by clicking the appropriate icon in the top right of the popup window. Click X to close the window.



- The information in a CCD may vary depending on what the source organization provides. A CCD may include:
  - Insurance information
  - Patient care team
  - Hospital discharge instructions
  - Other relevant clinical information
- Use the Collapse All feature to quickly scan for specific information within the CCD. Click the arrow next to any section to expand and view details.



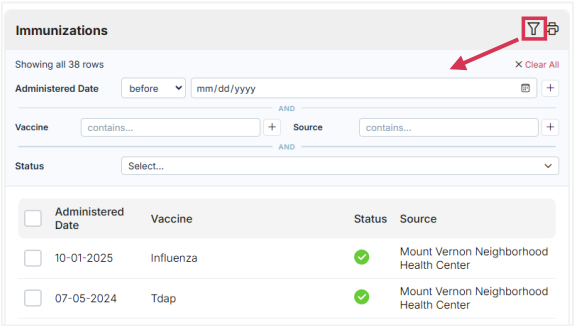
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Patient Synopsis: Helpful Tips

Clinical Data Availability

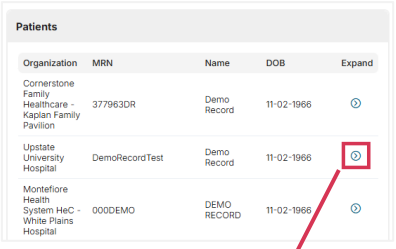
Patient records include available clinical data from January 1, 2024 to present.

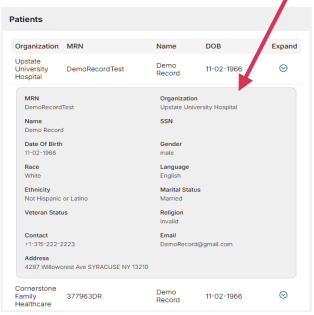
Clinical Section Filtering



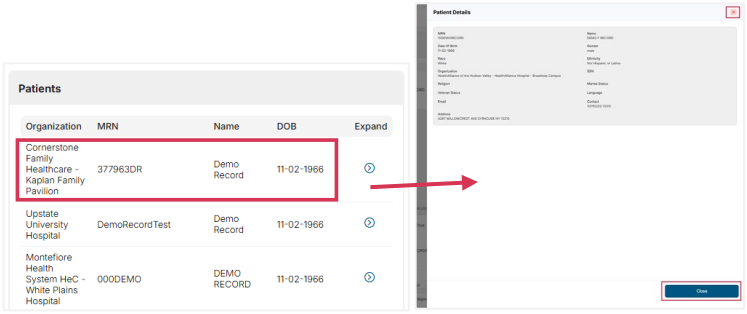
- All clinical sections have filter capabilities. Click the filter icon in the top right of each clinical section.

Expand and Collapse

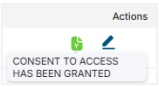




- Numerous sections within the clinical record have extended content. Click the expand and collapse icons to view more details or to minimize the section as seen in the example below from the Patients section.
- Click on the expand icon for additional data.
- Click any place within the record and a window will expand with additional Patient Details. Click the X in the top right, or Close in the bottom right to exit.



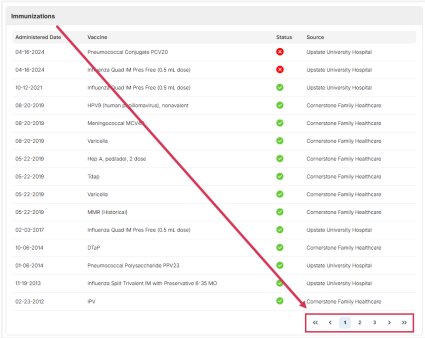
Icon Details



- Hover over icons throughout the portal for quick definitions. An icon key is available for reference.

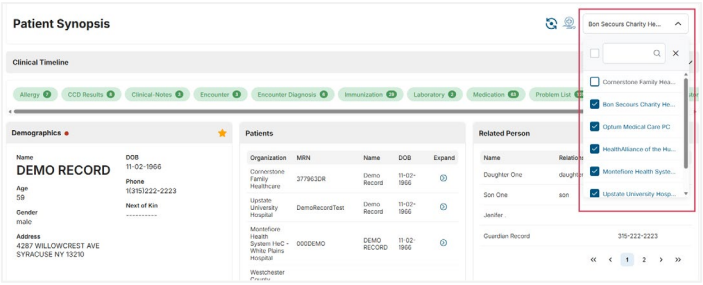
Navigating Additional Pages

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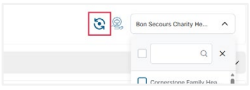


- If multiple pages of data exist, use the page number icons to navigate.

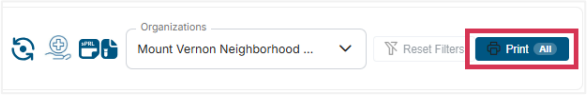
Organization Filtering



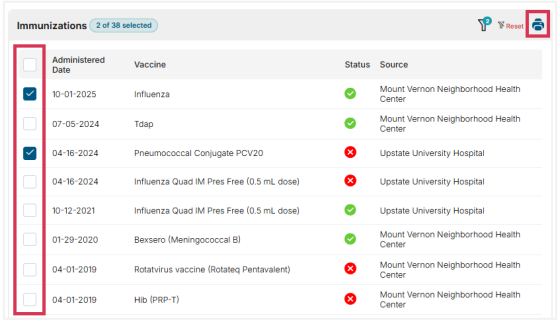
- Click the drop-down arrow to filter available clinical data by organization. Click the check boxes to include or exclude organizations.
- To remove filters, click the reset icon.



Printing

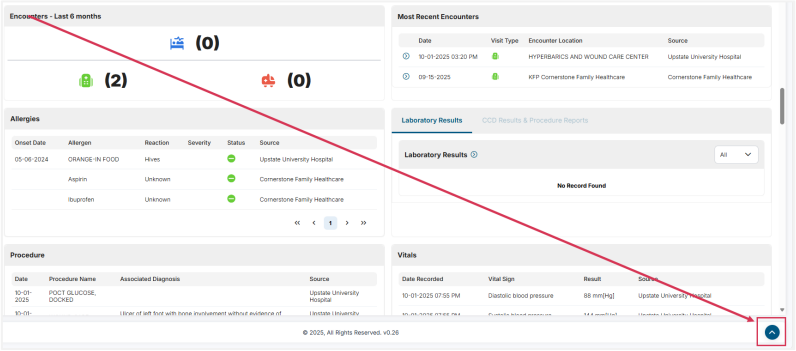


- Print all available clinical information within a patient's record using the Print All button located at the top of the Patient Synopsis.
- Print individual clinical sections using the printer icon located in the section header.
- Select multiple items to print using the check boxes within each section.



Quick Scrolling

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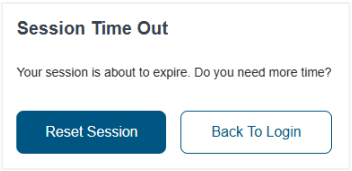
- Click the return to the top icon, located in the bottom right corner of the screen, to quickly jump back up the screen.

Service Names

- Services may appear under new names.

HealtheConnections' HIE Portal	Previous Portal
Reports	myData, myPopHealth, Administrative Reports
Results	myResults
Secure Messaging	Direct Mail
Statewide Encounter Alerts	myAlerts

Session Timeout

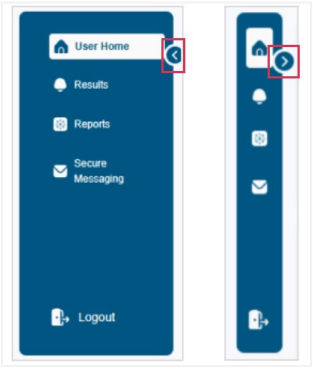


- If inactive, a pop-up will appear prompting to either Reset Session (return to the portal) or Back to Login (logout of the portal). If no response is receive, the system will automatically log the authorized user out.

HealtheConnections' Services

Service Navigation

Expanded View Collapsed View



- The Navigation Panel on the left side of the screen displays a list of provisioned services.
  - Selecting a service grants access to its features.
  - Click on the expand/collapse button to change the screen view.

Authorized User Access

Services are available based on approved account provisioning from their organization. If access needs to modify or terminate, use the following: Authorized User Account Modification & Termination Form

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Reports

Reports are available depending on approved access. This could include:

- Organization-specific reports for RHIO Administrators and Audit Contacts to complete administrative and audit reporting (e.g., Active User Lists, Break the Glass, etc.).
- Patient-specific data reports that provide insights into patient profiles (e.g., Skilled Nursing Facility, Hospital/ED utilization, etc.).
- Public Health reports on specific population health topics (e.g. Perinatal Syphilis, Opioids, etc.)

⚠️ **Important**: Reports are continuously being developed. If you require a report, please complete the Authorized User Account Modification & Termination Form to request access to available reports.

Results (formerly myResults)

Named providers, or individuals delegated by a named provider, can access clinical results via Results. Results will display automatically when the individual is listed as the Ordering, Consulting, Referring, Admitting, Discharging, or other designated resource for a patient. Consent is not required to view these records due to the existing treating relationship with the patient.

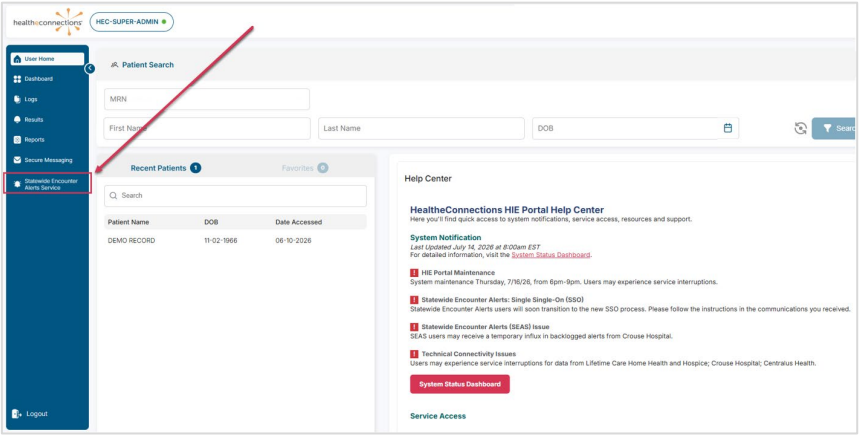
⚠️ **Important**: Results may not be available; however, the same information can be accessed through Patient Lookup**.**

Secure Messaging (formerly Direct Mail) and Provider Directory

Secure Messaging is HealtheConnections' HIPAA-compliant secure messaging service that allows enrolled users to send and receive Protected Health Information (PHI) securely. Click here to view the Secure Messaging User Guide, which includes the Provider Directory.

Note: For quick access to the Provider Directory, a link is available in the Help Center on the User Dashboard.

Statewide Encounter Alerts



- The Statewide Encounter Alerts service is accessible in the Navigation Panel on the left side of the User Dashboard. For instructions on using this service, review the guides in the Resource Center.

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Resources

HealtheConnections Support

HealtheConnections is here to help and is your first stop for support. For questions or assistance, please contact HealtheConnections at:

- 315-671-2241 ex. 5
- Support@healtheconnections.org

Icon Key

The Icon Key provides visual references to help identify actions, statuses, and features throughout the portal. Additional icons may be available.

Image	Icon Description	Image	Icon Description
	Action: Collapse All		Navigation Panel: User Home
	Action: Expand All		New Feature in the Portal
	CCD (View CCD)		Page Number (one page)
	Clinical Notes (View Note Details)		Page Number (end page)
	Consent Action: Add/Change (Pencil)		Print
	Consent Action: Break the Glass		Reset
	Consent Action: Minor Override		Problem or Result (Abnormal)
	Consent Value: No		Return to the Top
	Consent Value: Yes		Show JSON
	Consent Value: Emergency Only		Star: Favorites/Pinned Patients
	Encounter Visit Type: Ambulatory		Statewide Patient Record Lookup (sPRL)
	Encounter Visit Type: Emergency		Status: Active
	Encounter Visit Type: Inpatient		Status: Completed
	Clinical Section Filter		Status: Finished
	HRSN Details		Status: Medication Active
	Imaging Viewer		Status: Medication Stopped
	Navigation Panel: Logout		Status: Not Done
	Navigation Panel: Reports		Transcription
	Navigation Panel: Results		
	Navigation Panel: Secure Messaging		

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