Notifications 7.3.0
User Manual v1.0

May 08, 2018

Legal Notice

The UMLS Metathesaurus License (or such other licenses as may be required by local terminology vendors) may apply to the use of data accessed by this software application. Please refer to https://uts.nlm.nih.gov/license.html for the UMLS Metathesaurus License text.

Questions or concerns relating to this documentation should be addressed to the supplier from whom the product was obtained.

Disclaimer

All patient identifiers, contact details and medical conditions represented in the screenshots and presentations shown in this document are fictitious to the best knowledge of Orion Health™, and do not relate to a real person or persons.

The screenshots and presentations shown are intended as examples only, and may differ from the actual screenshots and presentations generated by the released product in commercial production.

Table of Contents

Revision Summary

Software Release	Document Version	Date	Nature of Amendment
7.3	1.0	May 8, 2018	General Availability release. • Added the **My Webmail** field in My Details.

Refer to Printable Documents to download printable versions of the documentation.

Introduction to the User Manual

The Notifications functionality enables healthcare organizations to notify external healthcare providers if one of their patients has visited the organization, or has new results or documents created or completed. Once notified, the provider can review all the information available for the patient in Clinical Portal.

Providers can subscribe to as many or as few notifications as they like and can determine the delivery method, for example, Clinical Portal user messaging and email. They can also decide whether to receive digest (summary) notifications daily, instead of receiving individual notifications.

To use Notifications effectively, you should know how to subscribe to notifications by patients and by relationship type. Refer to <u>Subscribing to Notifications</u> for details.

6

About this Manual

This manual describes how to use the Notifications features, and is designed for users of Notifications. A user has access to Clinical Portal and is a subscriber to one or more predefined notifications, and is generally a healthcare provider external to the healthcare organization. The user can select which notifications they wish to receive and their preferred delivery method. It is assumed that readers are familiar with the use of Clinical Portal. Refer to the *Clinical Portal User Manual* for details.

Administrators should read this Notifications User Manual in conjunction with the *Notifications Administration Manual*.

In the screen captures throughout this manual, mandatory fields are marked with a red asterisk *.

Notifications allows you to subscribe to secure, non-secure, and summary notifications and receive the notifications in the preferred delivery method.

Typographical Conventions. The following typographical conventions are used throughout this manual and in the application's help screens.

Convention	Description
< >	Angle brackets identify variables that you must supply. Do not type the angle brackets.
[ ]	Square brackets represent an optional item. If an item is not marked with square brackets, it is required. Do not type the square brackets.
`monospace`	Monospace type indicates directory names, path names and file names.
bold	Boldface type indicates button names and menu commands.
⚠️	Points out Important information.
➖	Cautionary advice to take note of something crucial.
ℹ️	Highlights additional information which may be relevant or noteworthy.
✅	Highlights a helpful tip.

Getting Started

Notifications enables hospitals to send a notification to a healthcare provider if one of their patients has visited the hospital or has new results or documents. Providers can subscribe to any number of notifications as required, and choose to subscribe to notifications generally (for all patients), or based on their relationship with the patient (relationship type). They can also decide whether to receive the summary notifications (these may be set up as daily summary notifications).

Notifications enables the provider to do the following:
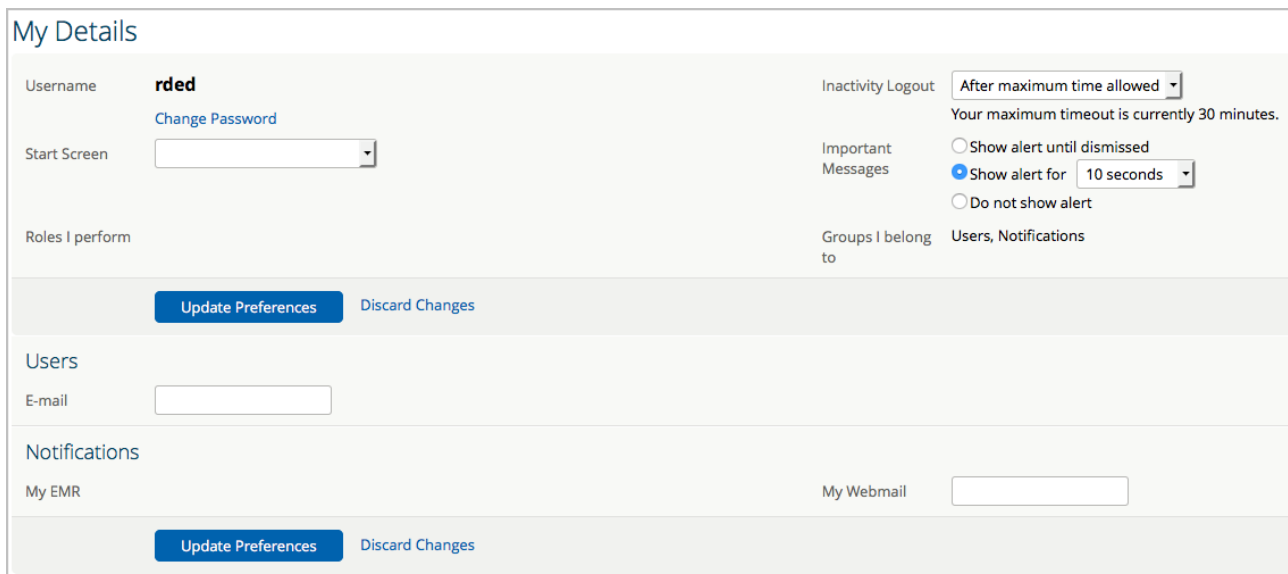
- Update your details and change the way in which you work with Clinical Portal. Refer to My Details for details.

- Subscribe to event notifications. Refer to Subscribing to Notifications for details.

- Receive non-secure (non-detail), secure (detail), and/or digest notifications of events. Non-secure notifications have less detail than secure notifications and do not contain patient information, while secure notifications do include patient information. Refer to Notification Messages for details.

My Details

Accessing My Details

The **My Details** screen is the central location for changing how you interact with Clinical Portal.

To access the **My Details** screen, select the **My Details** icon 👤 in the **Common** menu. The **My Details** screen is displayed, as shown in the following screenshot:

> The **My Details** screen may look different to the example shown, depending on which Orion Health applications have been installed at your site and the level of access you have been given.

My Details Panel

The **My Details** panel contains details including options for changing the way in which you work with Clinical Portal as a whole. These include the following:

- **Groups I belong to** - This lists your group memberships which determine the screens and functionality you can access in Clinical Portal. Both the Roles and Groups lists are read-only; if there are options within Clinical Portal that you should have access to, contact your administrator to make the change.

- **Change my password** - Select this link to change your password. You are advised to change your password regularly. Depending on your organization's policy, you may also be prompted to change your password. Alternatively, your login to Clinical Portal may be linked to your organization's network login.

9

- **Home Page** - This is the first page you see following your login to Clinical Portal or when you select the **Home** icon from the menu bar.

  - o If this field is blank, the default Clinician Home Page will be used.

  - o If you do not want to use the default home page, select an alternative page from the drop-down list. Your selection will become your new home page as soon as you save the change.

- **Inactivity Logout** - This is the period after which you will be automatically logged out of Clinical Portal if there is no activity detected in the application. A default period will be displayed on the screen; you can select a lesser value than this but not a greater one. Refer to Specify System Preferences in the *Clinical Portal User Manual* for details.

- **Important Messages** - An **Important Message** is a message that has been tagged as *Important* by the user who sent it. When such message arrives, a notification is displayed at the bottom of your screen.

  !You have a new important message X

  The options for this property determine how this alert will be displayed.

  - o **Display until dismissed** - This displays the alert until you manually close the notification.

  - o **Show alert for <n> seconds** - This displays the notification for the set number of seconds.

  - o **Do not show alert** - This sets the notification not to display.

Group Panels

Groups provide you with quick access to the electronic medical records of the patients you are most interested in. Note that the options on this screen are likely to differ from user to user; the ones described in this manual are representative only.

The groups to which you belong are shown below the Homepage panel. Examples of groups are Clinicians and Notifications. Group attributes, which are properties associated with the groups you belong to, are configured by the administrator. Refer to Creating or Deleting a Delivery Channel in the *Notifications Administration Manual* for details.
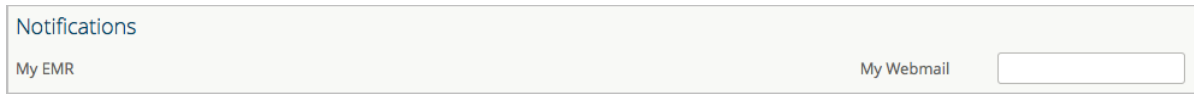
Notifications Group

There are three attributes associated with the **Notifications** group:

- **EMR** - This refers to the Electronic Medical Record (EMR) system where your Notifications and Event Details are sent to (read only). You can change your default EMR on the **My Subscriptions** screen. Refer to Default Delivery Methods for details.

- **Fax Number** - This refers to the fax number of the user.

- **E-mail** - This refers to the e-mail address of the user.

- **My Webmail** - This refers to the secure webmail address of the user.

  The **Notifications** panel is shown in the following screenshot:

Notifications		
My EMR	My Webmail	

> Other groups may be listed in the **My Details** screen, depending on which Orion Health applications have been installed at your site and the level of access you have been given to them.

Subscribing to Notifications

Healthcare providers can subscribe to receive notifications of specific events.

They can subscribe to receive notifications for all relationship types or subscribe depending on their relationship with the patient.

From the **My Subscriptions** screen in Clinical Portal, you can do the following:

- Update your default delivery methods. Refer to Default Delivery Methods for details.

- Update subscriptions for all patients you have a relationship within the **Subscriptions for patients I have a relationship with** panel. Refer to Updating Subscriptions for All Patients for details.

- Update subscriptions for patients by relationship type in the relationship type subscription panels. Refer to Subscriptions by Relationship Type for details.

Default Delivery Methods

The default delivery methods identify your default settings for subscribing to notification events.

> Notifications is configured to use a secure (detailed) delivery method by default with a checkbox that cannot be cleared. Secure notifications contain patient-identifiable data.
>
> You may, however, choose to receive other secure and non-secure notifications by default. Non-secure (non-detail) notifications do not contain patient-identifiable data; for example:
>
> - Individual notifications through e-mail, for example, when there is new information is available.
>
> - Digest notifications. The frequency of the digest notification is determined by the organization; for example, it can be a daily digest.
>
> Refer to Notification Messages for details.

When you select a delivery method in the **By default** area, it applies this delivery method to all your notifications which have **Delivery Options** set to **Use Default**. In this case, you do not need to select a delivery option for each subscribed notification in the **Subscriptions for patients I have a relationship with** panel.

Notifications will use the **By default** settings, as shown in the following screenshot. Refer to Updating Subscriptions for All Patients for details on how to subscribe to notifications.

Depending on how your environment has been set up, your screen layout may be different from this screenshot.

Specifying Default Delivery Methods

1. Log in to Clinical Portal.

2. Navigate to **Notifications > My Subscriptions** to display the **Subscriptions** screen.

3. Update the default delivery method fields as shown in the following screenshot:

Depending on how your environment has been set up, your screen may contain more or different fields than shown in this screenshot.

Field(s)	Description
My EMR	The EMR system where your Notifications and Event Details are sent to.
My Email Address	The email address where email notifications are sent to.
	Make sure that the email address is entered correctly. If the address entered is invalid, you will not receive any of the notifications you subscribed to.
	If you have not received any patient updates a week after you specified your email address, we recommend you contact your system administrator and ensure a valid address is entered into the system.
By default	The default delivery method for subscribed notifications, for example, `Notify By Email` (your specified email address). This method is typically not secure and is not a suitable location for sensitive patient information.
	If you require a daily summary notification as the delivery method, you can select any or all options available on your screen, for example:
	• Notify in Daily Summary Email
	• Notify in Daily Summary Concerto User Messaging
	The daily summary is automatically generated every night and includes a summary of your notifications from the previous day. As it does not contain

Field(s)	Description
	sensitive information, any destination can be specified.

4. Select the **Save** button.

Updating Subscriptions for All Patients

Notifications enables a healthcare provider to subscribe to notifications for all patients with whom they have a relationship. The administrator provides selected default subscriptions and may update these from time to time.

When you first visit **My Subscriptions**, you will find a default selection of subscriptions. You can update this initial default subscription with your preferences.

The **Subscriptions for patients I have a relationship with** panel identifies the notifications of events you can subscribe to, for any patient with whom you have a relationship. When the checkbox beside the notification name is selected, you will receive notifications of that event.

1. From Clinical Portal, navigate to **Notifications > My Subscriptions**. This displays all notifications in the **Subscriptions for patients I have a relationship with** panel.

If one of the notifications on your screen is grayed out, then you have subscribed to notifications differently for each type of relationship with your patients. Refer to Complex Subscriptions for details.

> If subscriptions for all patients are disabled or enabled, then all of the corresponding relationship-type based subscriptions are also disabled or enabled with the same delivery option.

2. Select the options you require for each notification in the fields described in the following table:

Field	Description
Notification	Select the checkbox beside the **Notification** field heading to select all the notifications.
Delivery Options	This refers to the delivery method for sending the notifications when the associated event occurs; for example, `Email` or `Daily Summary`. If you want to add or set an alternate delivery option, select the **Change** link and select the relevant delivery option checkboxes.

3. Select the **Save** button.

4. When required, you can choose to subscribe to notifications differently depending on your relationship with the patient.

5. Select the **Change to subscribe by Relationship Type** link at the bottom of the screen to display a screen with a subscription panel for each relationship type. The existing subscriptions from the **Subscriptions for patients I have a relationship with** panel are copied to each of these subscription panels. Refer to Subscriptions by Relationship Type for details.

Subscriptions by Relationship Type

Notifications enables a healthcare provider to subscribe to notifications depending on his or her relationship with the patient. Default subscriptions are provided, and the provider can update these with his or her preferences.

The Subscriptions panels identify the notification events you can subscribe to, for any patient with whom you have a relationship. If the checkbox alongside a notification event is selected, you will receive notifications of that event.

To update subscriptions by relationship type:

1. From Clinical Portal, navigate to **Notifications > My Subscriptions**.

2. Select the **Change to subscribe by Relationship Type** link at the bottom of the screen to display a screen with a subscription panel for each relationship type. This displays all notifications, in subscription panels for each type of relationship, as shown in the following screenshot:

> If all of the relationship-type based subscriptions for a notification type are disabled or enabled with the same delivery option, then its corresponding subscription for all patients will also be disabled or enabled with the same delivery option.

3. Each panel displays the notifications in the same way as in the **Subscriptions for patients I have a relationship with** panel. Refer to Updating Subscriptions for All Patients for details on how to update subscriptions.

4. When required, you can change subscriptions to subscribe in the same way by selecting the **Change to subscribe the same way for all patients** link at the bottom of the screen, as shown in the following screenshot:

Complex subscriptions happen when you have subscribed to notifications differently for each type of relationship with your patients, as shown in the following screenshot:

Complex Subscriptions

When returning to the **Subscriptions for patients I have a relationship with** screen (by selecting the **Change to subscribe the same way for all patients** link at the bottom of the screen), you will see this notification is grayed out, as shown in the following screenshot:

Subscriptions for patients I have a relationship with

	Notification	Delivery Options
☐	Clinic Appointment Completed	
☐	Inpatient Admission	
☐	Inpatient Discharge	
☐	Patient is admitted to ER	
☐	Patient is discharged from ER	
☐	A new document (imaging report) is available	
☐	Final Radiology Report is available	
☐	Final Laboratory Result is available	
☐	Final Microbiology Result available	
☐	Interim Microbiology Result available	
☐	A new document is available	

The notification is grayed out since the subscription is complex, which means that the subscription for this notification no longer applies to all patients you have a relationship with but only to patients where you are the referring provider.

Notification Messages

Notifications enables healthcare providers to subscribe to notifications of specified events. The provider can decide whether to receive secure (detailed), non-secure (non-detailed) or summary notifications.

Notifications can send the following types of notification message:

- **Secure** or detail message - A detail message contains the relevant patient information in the notification, and must be delivered by a secure method that maintains patient confidentiality. Refer to Secure Message for details.

- **Non-secure** or non-detail message - A non-detail message is sent when the notification is delivered by a delivery method that is not considered secure, which does not contain any patient information. Refer to Non-Secure Message for details.

- **Digest** message - A digest does not contain any patient information and displays the number of each event type that occurred since the last summary for the provider's patients. The frequency of these summaries is determined by the administrator, for example, a daily summary. Refer to Digest for details.

Digest

Notifications can send a digest (summary) notification to healthcare providers. The digest does not contain any patient information and can be sent daily. The digest displays the number of each notification type that has occurred since the last summary for your patients. Only notifications you have chosen to receive are included in the summary notification.

The digest notification message includes the sections described in the following table:

Message Section	Description
Message header	This refers to the message header defined by the organization that is applied to all messages.
Digest message body	This refers to the body of the digest message, tailored to the delivery method. The body summarizes the number of each event type that has occurred since the last summary by relationship type. Events that occurred for multiple relationships are counted on each relationship type.
Message footer	This refers to the message footer defined by the organization that is applied to all messages.

A sample digest message body is shown in the following illustration:

```
One or more patients for whom you are recorded as the Referring Physician or
Primary Care Provider have had activity at ABC Hospital within the last
24 hours.

The following events have occurred for patients for whom you are recorded as
the Referring Physician:

1 Inpatient Discharge

1 Patient is admitted to ER

2 Inpatient Admission

1 Patient is discharged from ER


The following events have occurred for patients for whom you are recorded as
the Primary Care Provider:

2 Inpatient Discharge

1 Inpatient Admission
```

Non-Secure Message

Notifications can send a notification of a patient's specified event to a healthcare provider with a relationship with that patient. A message sent for two relationships includes both relationships in the message body.

Notifications will send the notification as soon as possible after the event happens. When the notification is delivered by a delivery method that is not secure, a non-detail message is sent, which does not contain any patient information.

The non-secure (non-detail) notification message includes the sections described in the following table:

Message Section	Description
Message header	This refers to any message header the organization has configured. This is the same for all messages.
Non-detail message body	This refers to the body of the non-secure (non-detail) message of the notification of the associated event, tailored to the delivery method.

Message Section	Description
Message footer	This refers to any message footer the organization has configured. This is the same for all messages.

A sample non-secure (non-detail) message body is shown in the following illustration:

```
A patient for whom you are recorded as the Primary Care Provider has had
recent activity at ABC Hospital.

To view the detail for this event, please login into ABC Portal at https:....
To unsubscribe, please change your subscriptions within ABC Portal by opening
the Notifications menu and utilizing My Subscriptions.
```

Secure Message

Notifications can send a notification of a patient's specified event to a healthcare provider with a relationship with that patient. The notifications will be sent as soon as possible after the event happens.

A secure (detail) message usually contains all the relevant patient information in the notification and must be delivered by a secure method. For example, it can be delivered to your received messages on your home page within Clinical Portal, as this is considered secure.

To view secure (detail) messages sent by Concerto User Messaging:

1. From Clinical Portal, navigate to **Messaging > Received Messages**. This displays all received messages including any notification secure (detail) message, as shown in the following screenshot:

Field	Description
From	**System** appears in this field for Notification-related messages.
Subject	This refers to the display name of the notification.
ID	This refers to the formatted patient name and primary patient ID displayed as a link. Select the link to put the patient into the Clinical Portal context.
Event	This field is empty for notifications sent through Notifications.
Received	This refers to the date and time the notification is received.

2. Select a notification message to open the detail of the notification. A message sent for two relationships includes both relationships in the message.

Field	Description
From	**System** appears in this field for Notification-related messages. These messages cannot be replied to.
To	This refers to the Clinical Portal username.
Subject	This refers to the display name of the notification.
Message Header	This refers to the message header defined by the organization that is applied to all messages.
Detail Message Body	This refers to the secure (detail) message body of the associated event.
Message Footer	This refers to the message footer defined by the organization that is applied to all messages.