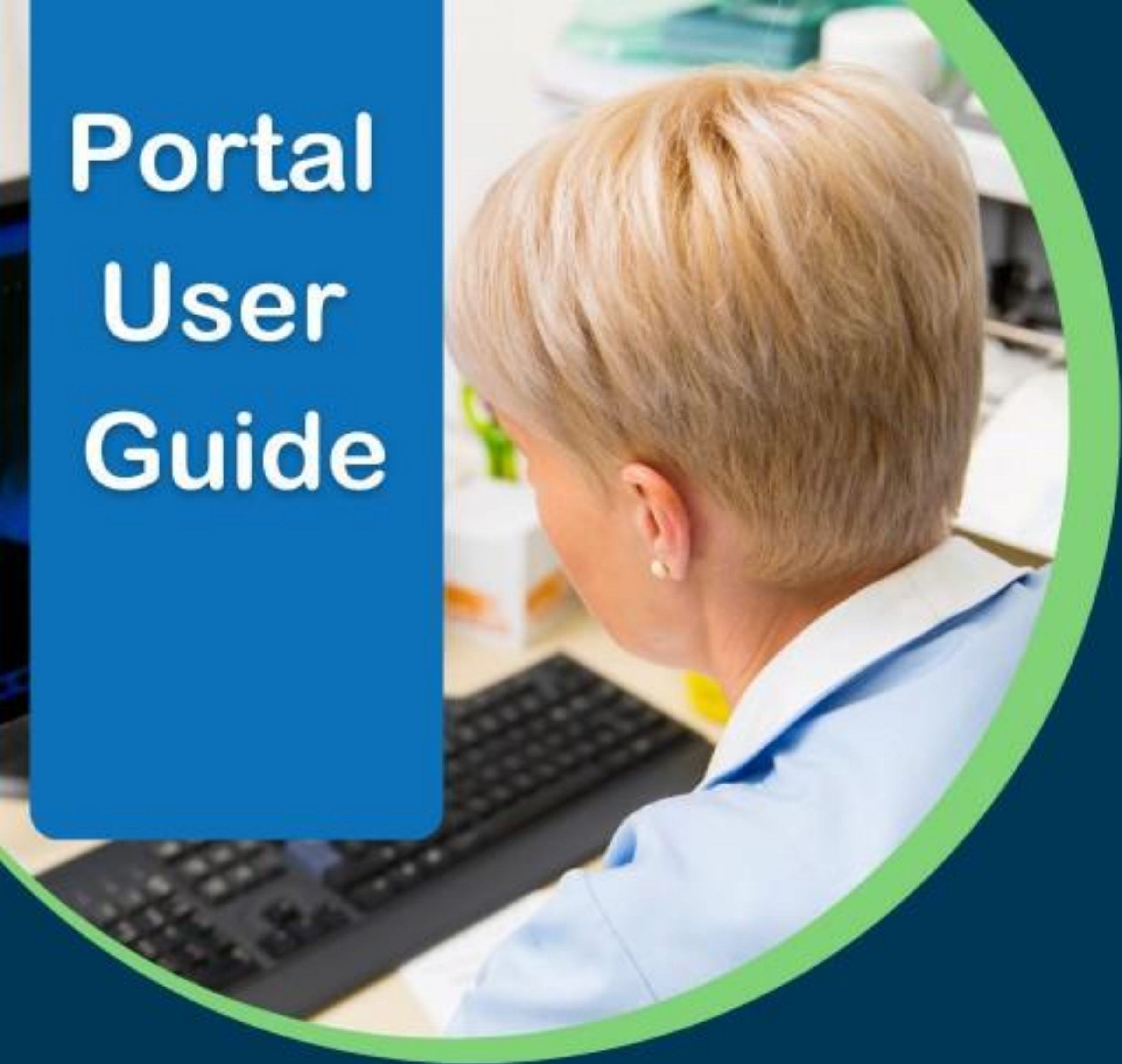
# Portal User Guide



The Connie Portal allows authorized users to access applications and services including patient records for HIPAA permitted purposes. This guide provides step-by-step information on how to access the basic functions of the Connie Portal.

Additional User Guides are available for specific applications and features that can be accessed within the Portal.

**CONNIE CUSTOMER SUPPORT**
P: 866.987.5514
E: help@conniect.org

Connie

# What's Inside

# User Stories

I'm the medical assistant for a busy primary care provider. I log in to Connie every day to check for information on patients who are coming in for their appointments. Using Connie, I can see if our patients have had a hospital visit or a visit with another provider, and even see lab or radiology results that I might not have in our EMR.

I'm a physician who needs to check my patients' Narx reports through the Connecticut PMP. I can log in to Connie, check on any clinical data for my patient and view their Narx report before prescribing controlled substances.

I wear multiple hats as a medical assistant and office manager for the doctor's office where I work. I can log in to the Connie portal, manage my office's authorized portal users, and check clinical information for our patients.

Before I meet with my patient during a visit, I can use the Snapshot feature to identify potential issues that I need to be aware of and discuss with my patient. I can quickly see their care team, and any healthcare encounters they had in the past year. This provides me with a quick orientation before digging into my patient's details in preparation for our appointment.

As an orthopedic surgeon, I have the ability to view patient images on my local archive, which are imperative to complete a consultation with my patient.

# Sources of Data

Connie receives data from participating healthcare organizations per Connecticut state statute.

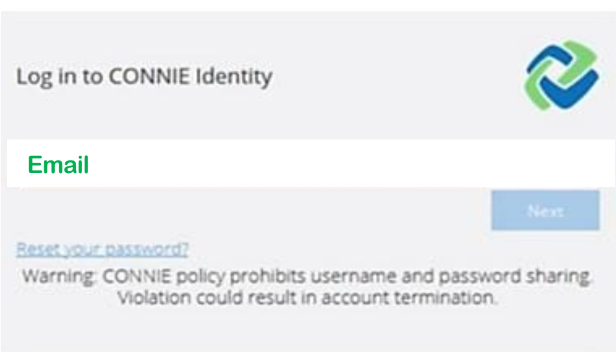
**Data types include:**

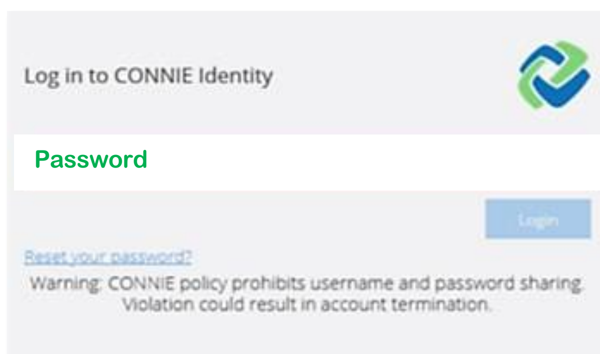
- Admit, discharge, or transfer information, which can include patient demographic, diagnostic, and insurance information
- Patient-specific clinical summary documents, called Continuity of Care Documents (CCDs)
- Radiology images and reports
- Laboratory results
- List of an organization's patients
- Other clinical that include discharge summaries, care notes, and care alerts

For a current list of the organizations sharing data, and the type of data they are sharing, visit www.conniect.org/connected-organizations/. Data also available, but not listed on the website, includes Continuity of Care Documents through National Networks.

# Accessing the Portal

1. Navigate to the portal.conniect.org
2. Login with email and password



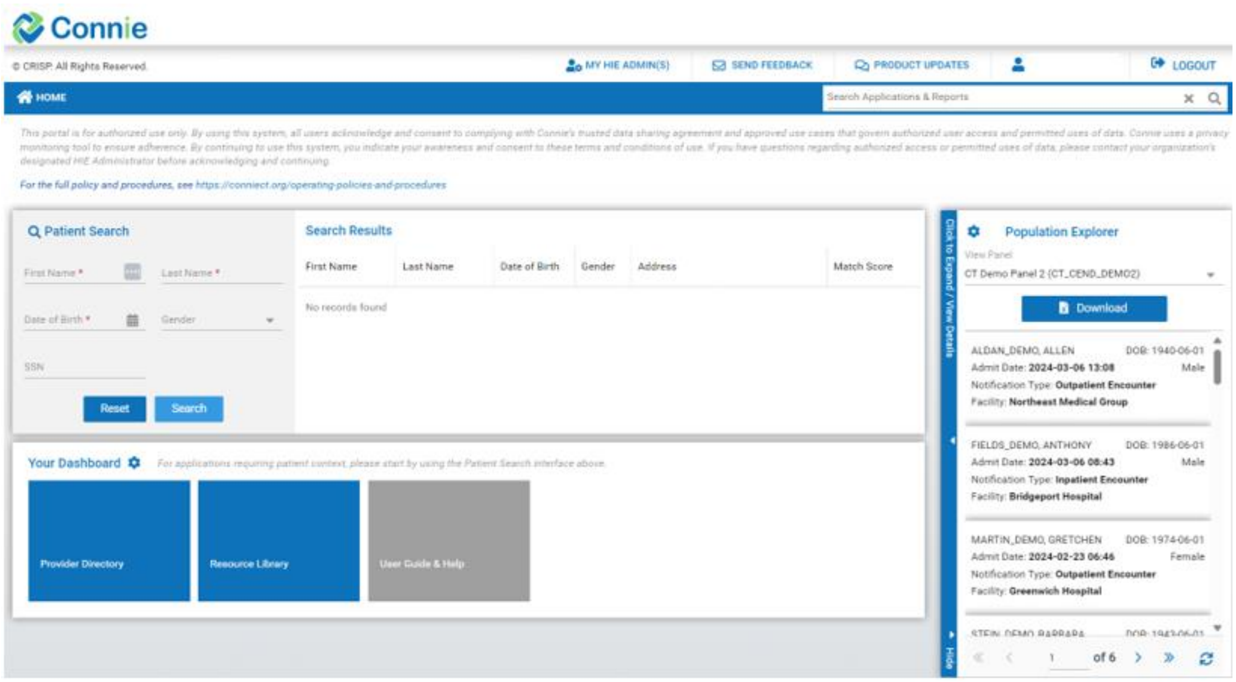

**Don't Have a Login? Contact Connie Customer Support at [help@conniect.org](mailto:help@conniect.org) or 866.987.5514 to request access. Resetting a Password - Click on the "Reset your password?" link and follow the onscreen instructions.**

# Two-Factor Authentication

To keep patient data confidential and secure, Connie requires that you set up Two-Factor Authentication (2FA) for your portal account. For more information about setting up 2FA, see **Connie Portal Two-Factor Authentication Guide.**

## Connie Landing Page

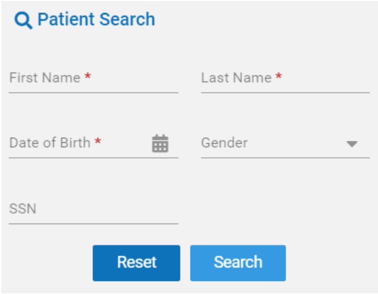
The Connie landing page consists of a Patient Search section, Dashboard and Population Health Explorer.




On launch, general applications will appear in the Dashboard beneath ‘Patient Search.’ For patient-specific applications, you will need to first search for a patient.

## Patient Search

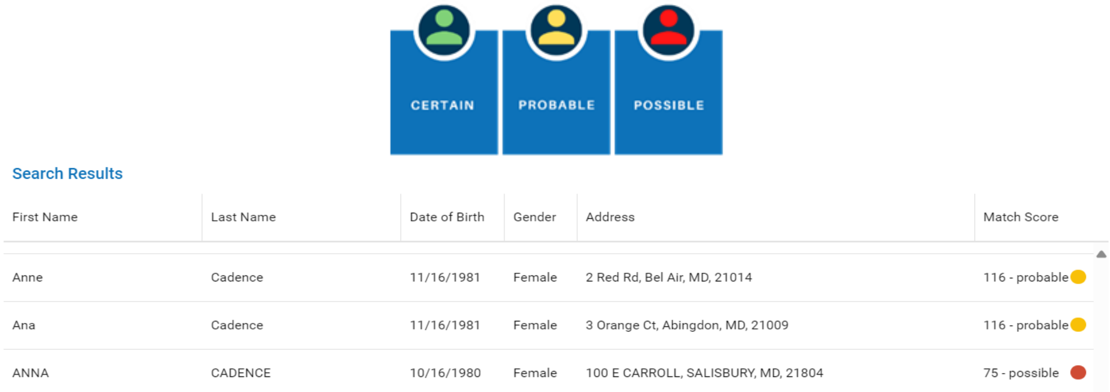
To conduct a patient search, users must provide at minimum:


***Gender and SSN can be added to Patient Search to refine results. Data entered is not case-sensitive, and dates do not need forward slashes separating the month, date, and year. Entering 050281 will result in 05/02/1981.***

## Patient Results

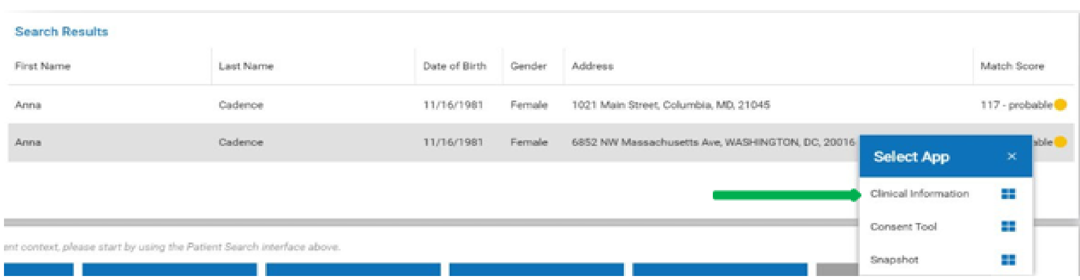
The results of Patient Search will appear in order of most likely to least likely matches.



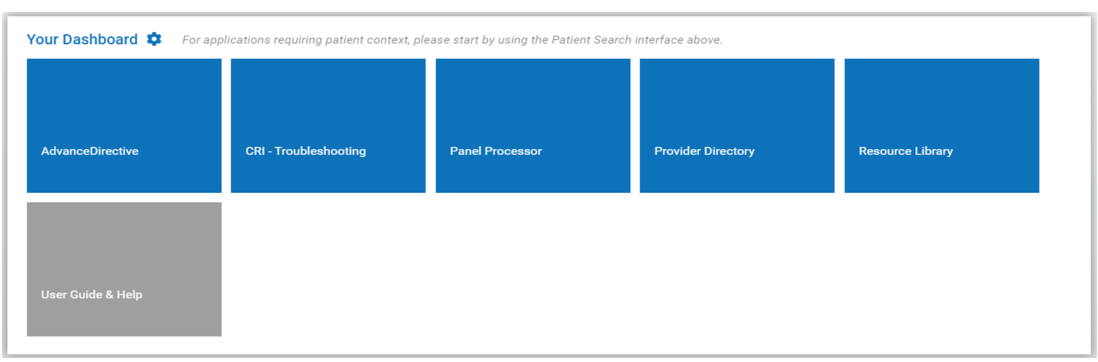

- The ‘Patient List’ displays all possible matches based on the patient information your EMR has sent to Connie.
- Each patient will have a ‘Match Score’ which will tell you how closely the patient matches the information sent to Connie. A patient can receive a match score that indicates ‘Certain,’ ‘Probable,’ or ‘Possible’ matches. The more data provided in the search, the better the match score.
- Only patients matched using the required fields plus gender and social security number (SSN) will display as ‘Certain.’

## Launching Applications

Once a patient has been selected, you may select the app you would like to launch.

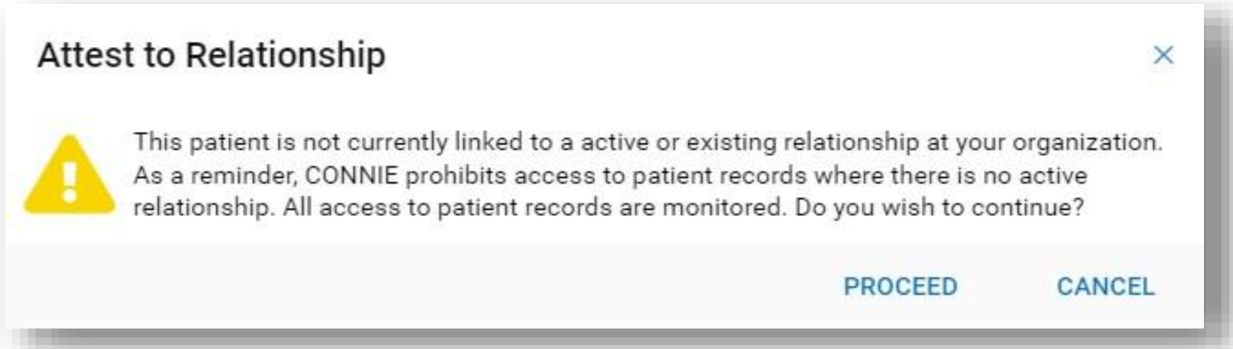



Alternatively, on patient selection, the Dashboard will be updated to include patient-specific apps.



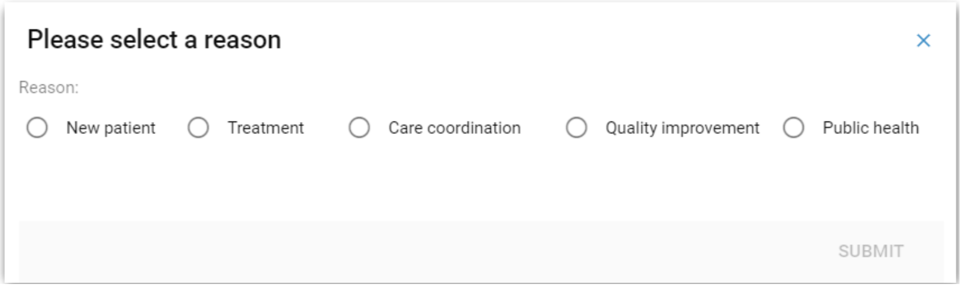
## Attest to a Relationship

If you try to access Connie for patients for whom we don't have a record of your relationship, you will get a pop-up warning:




Selecting 'cancel' will return you to 'Patient Search.'

To proceed, you will be asked to enter a reason for accessing that patient's record in Connie.




Please note, certain users do not have this functionality available to them. If you believe this is an error, please contact your HIE Admin.

Also, please be aware that all instances of breaking glass are recorded and audited.

# Navigation

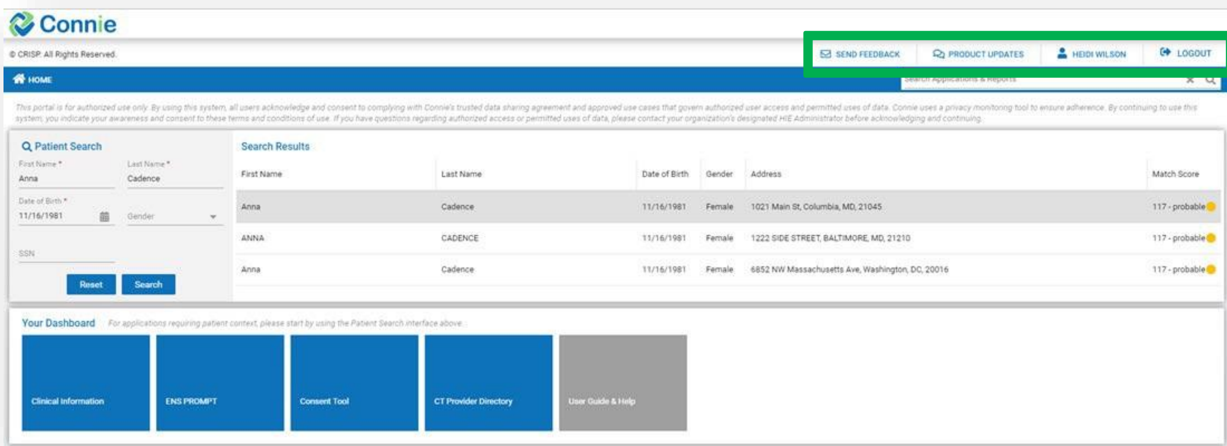
## Applications Features

All applications are displayed within the Portal.

‘Home’ takes you back to the dashboard view with applications displayed as tiles, allowing you to conduct a new patient search.

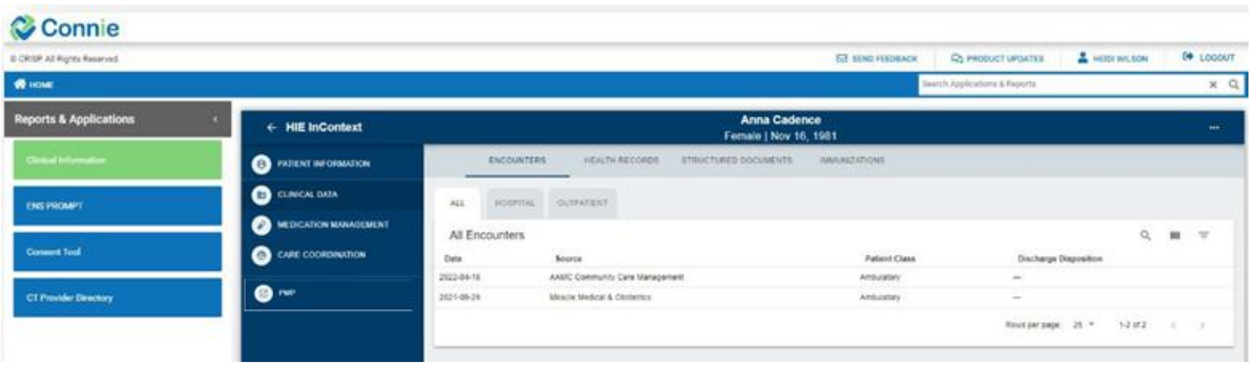
The upper right area allows you to:

- Send feedback to Connie if you are having difficulty or want to suggest improvements.
- Review product updates on any changes to features within Connie.
- Select your name to log out or change your password.
- Quickly log out.




## Menu

Once you have selected your initial application, your Connie Apps will appear on the left side under ‘Reports & Applications’. Use this left menu to navigate to the other Connie tools. This menu collapses once you minimize your screen size.



### Enlarge the Screen

To collapse the Application menu to view the app in a larger screen, click the **<** sign next to 'Reports and Applications'.

### Using Tables in the Apps

Tables can be searched and filtered using the table navigation buttons.

Clicking on the field name in a table in any app will sort the field alphabetically.
Use the tools on the right side to (a) search any terms on the page, (b) customize the columns available to view, and (c) filter results.

## Icons

**Search:** Search allows you to search through the data in any of the columns displayed on the screen to find specific information. The field is a dynamic search. As you type, Connie will narrow down the documents available to you to match your search criteria. To clear your search criteria, click on the '**X**' next to your search box.

**Columns:** View Columns allows you to add or remove columns from your view. Editing the columns viewable on the data table only affects the currently viewed table.

**Filters:** Filters allows you to set filter criteria to filter the data displayed. Filters vary by area of the Clinical Data section but always include date and source filters.

**Camera:** The camera icon means that a radiology report has a corresponding image for you to view. Click on the icon to open an image viewer.

**Orange Flags:** Orange flags next to an individual record indicate a value that is abnormal (per the sending organization).

**Down Arrow:** An arrow at the column header indicates the direction the column is sorted. All columns in the four areas of the 'Clinical Information' section can be sorted. Simply click on the column header to toggle between ascending and descending order.

**Imaging:** Imaging worklist allows you to view and compare multiple images for your patient.

**Download PDF:** 'Download PDF' enables you to download the PDF version of the patient health record you are viewing so that you can print it or upload it to your own medical record.

**Download Attachment:** 'Download Attachment' enables you to download the PDF attachment the organization has included in the health record they sent over.

**Blue Information Icon:** The blue information icon tells you that there is more information about this row of data (typically you'll see the blue information icon in the 'Care Team' section). Hover over the icon to see contact information.

**Orange Information Icon:** The orange information icon means that there is an alert or more information. Hovering over the icon will give you additional information about the item in question.

**Navigation Bars:** At the bottom of most of the screens in the 'Clinical Information' section, you'll be able to easily navigate through pages and rows of data. You can set the default number of rows of data you want returned (10, 25, 50, 100) and you can use the right and left arrows to navigate through pages when your patient has multiple pages of data to be displayed. Changing the number of rows of data on one table will not persist across other tables.

***Note: Any changes you make to your preferences will not persist the next time you log into the system.***

## Connie Apps

The following tools are currently available in the Connie Portal for all clinical users:

- **User Guide**
- **Resource Library**
- **Provider Directory**
- **Clinical Information**
  - **Patient Information**
  - **Clinical Data**
  - **Care Coordination**
  - **Medication Management**
  - **Social Needs Data**
  - **Apps**
- **Snapshot**
- **Population Explorer**

Additional tools are also available for select users.

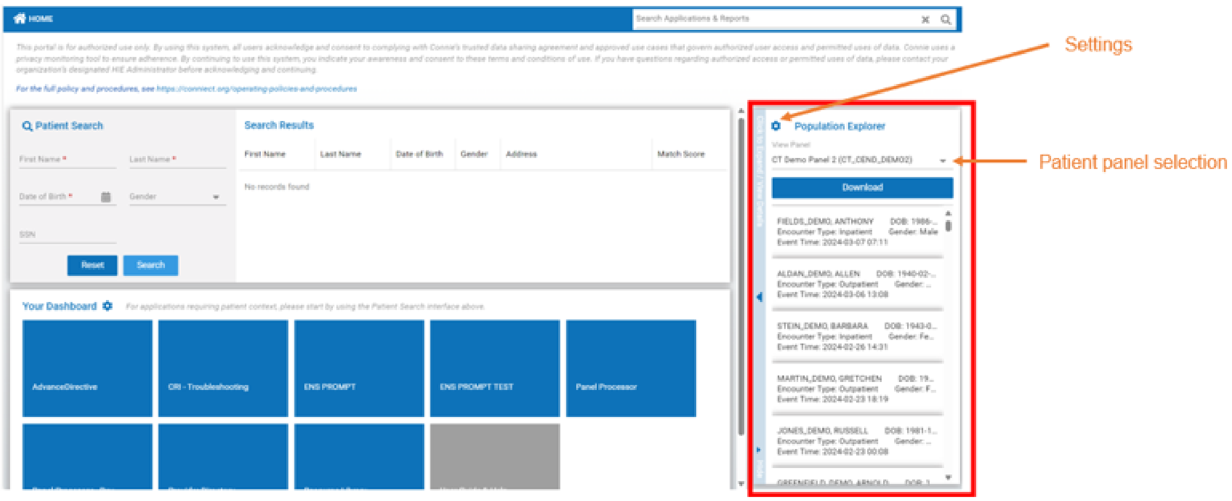
- **Prescription Monitoring Program (PMP):** Available under Clinical Information Apps only to licensed providers registered with the Connecticut Prescription Monitoring and Reporting System.
- **HIE Admin Tool:** Available only to participating organizations' designated HIE Admin(s).
- **Panel Processor:** Available only to participating organizations' designated HIE Admin(s).
- **Consent Tool:** Available only to licensed providers.

# Connie Apps: Available on Dashboard

## Population Explorer

Population Health Explorer is an encounter notification service (ENS), also known as Connie Alerts, that enables participating organizations and providers to receive vital alerts regarding your patients' admissions and discharges from emergency departments, and inpatient and outpatient settings through the Connie Portal.

The Population Explorer widget is available to the right of the dashboard. Initially you must select a patient panel to populate the patient encounter list even if you have only one panel. Modifying your settings to your preferred default panel will eliminate this initial step going forward.

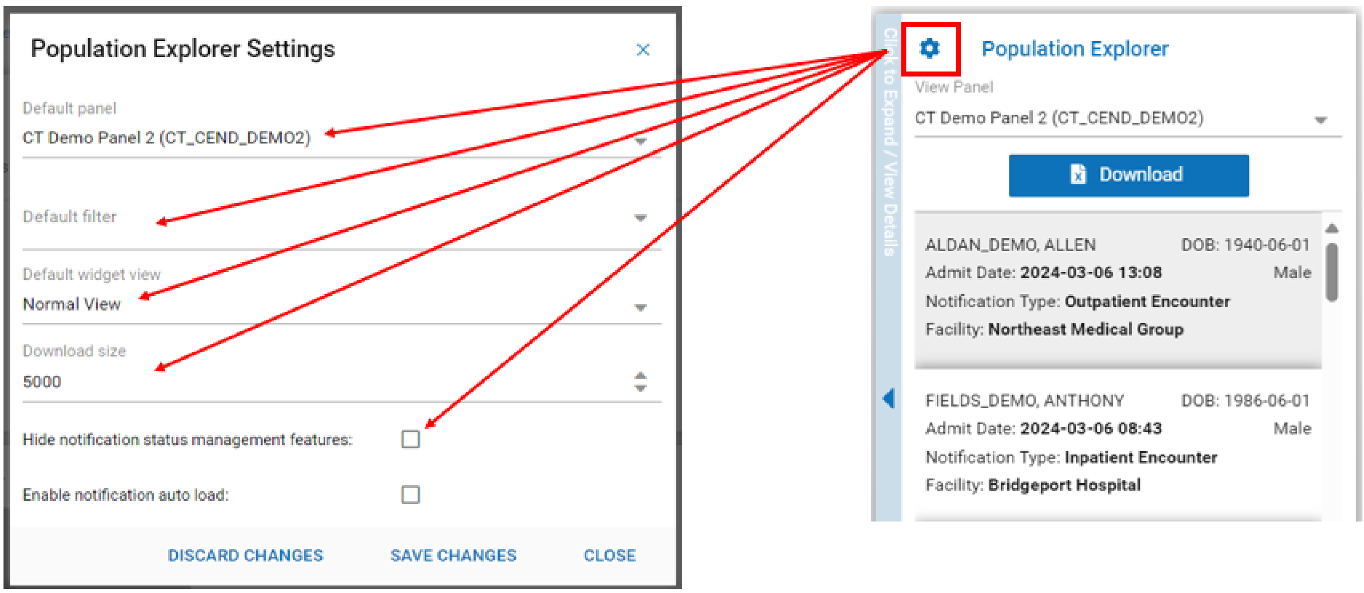



## Modify Default Settings

Settings allows you to set some default settings including a default patient panel, a default filter, a widget view (collapsed, normal, or expanded), default  download size and the option to hide the patient status updates. To change your default settings, click on the gear icon to the top left corner of the Population Explorer widget.

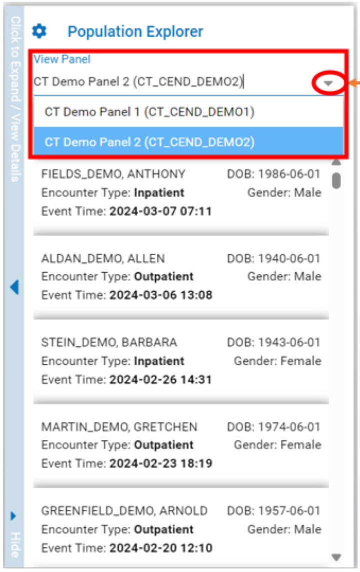
To select a default patient panel, click on the drop-down arrow and select a patient panel to be your default panel (you may only have one panel available to select). If you do not identify a default patient panel, you will have to select a patient panel each time you log in to the Portal.

If you have any saved filters under Quick Filters (see page 22), you can select one as your default filter. You can also change the download size of your panel up to a maximum of 5000 rows. Note that the patient notification status updates feature is defaulted as turned on (for more information about the patient status updates functionality please refer to Slide 13. **Please note, when you change your widget view default, you will have to log out and log back in to see the update.**



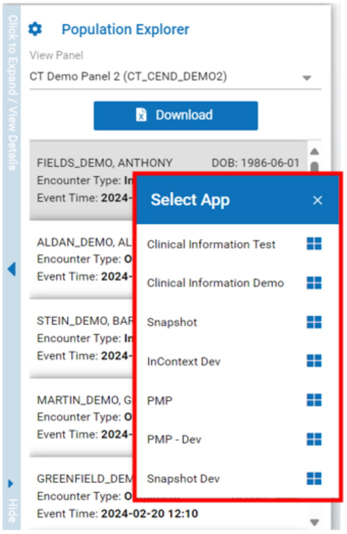
## Panel View

You have the option to switch between your default panel and any of your other patient panels (if applicable) without going back to settings. From the top of the Population Explorer widget select the drop-down arrow to the right of View Panel.



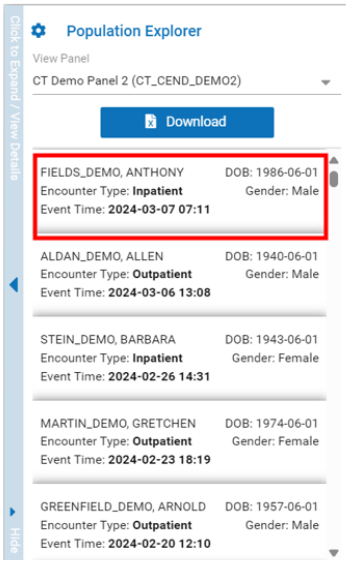

## Launch a Different Application

To view the patient's clinical information, right click on the patient's encounter notification in the Population Explorer widget and select Clinical Information in the option box.



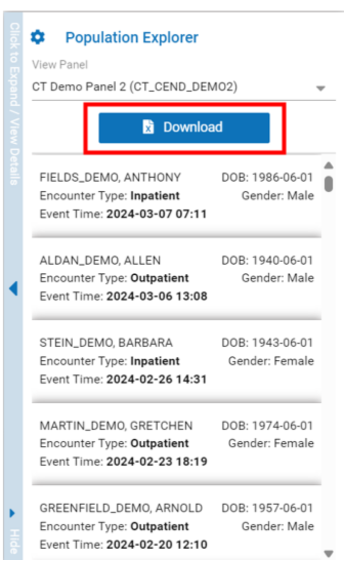
## Notification Display

In the widget view, each notification display populates the patients name, DOB, Encounter Type, Gender, and Event Time. The Event Time, triggered by the most recent ADT available from an organization, updates with the 20-to-30-minute refresh of Connie Alerts.

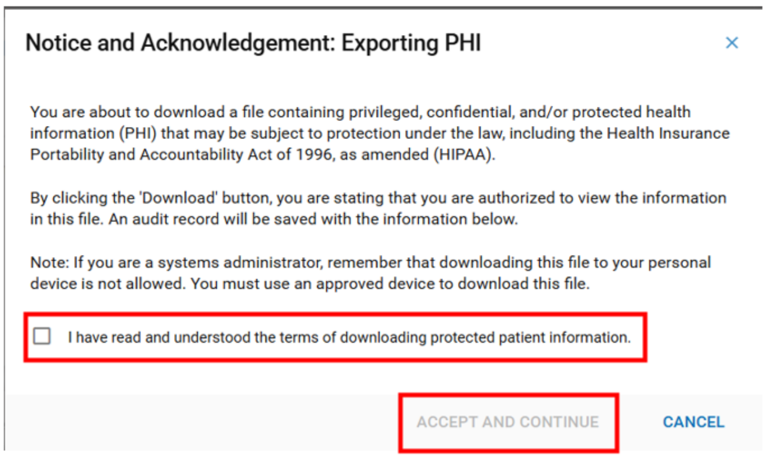


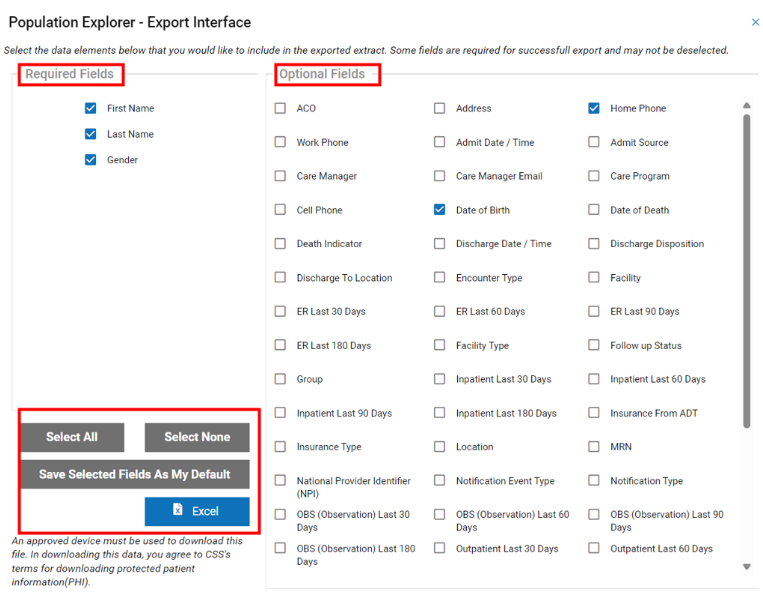

## Download Patient Panel

From the Portal Dashboard widget, the full encounter list can be downloaded into a CSV file by selecting the download button below View Panel. Up to 5000 rows can be downloaded based on your settings.



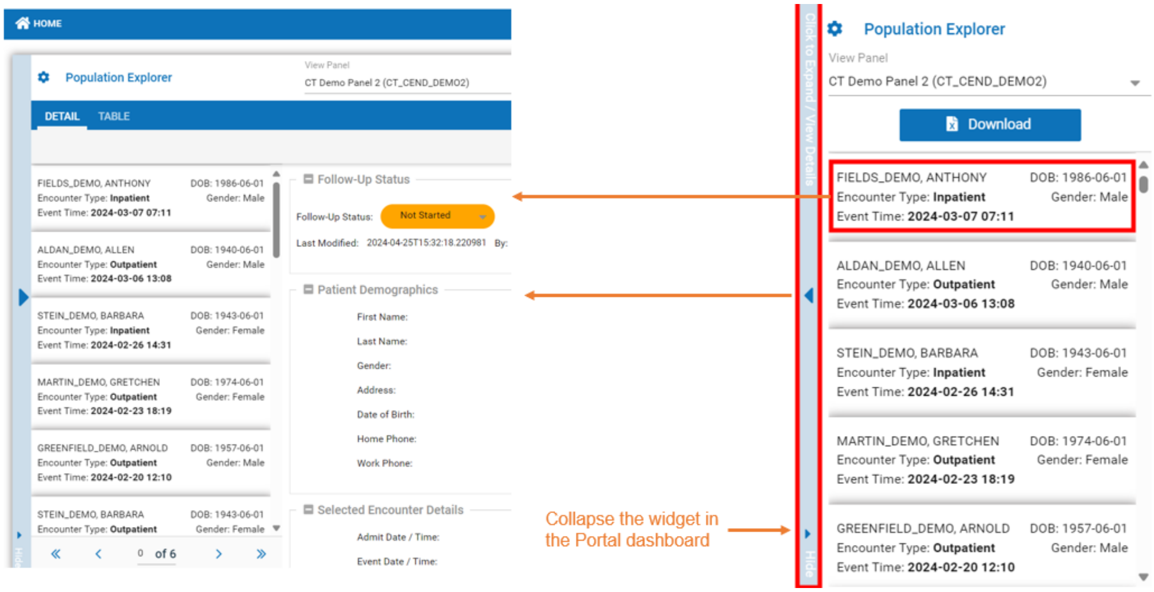
After selecting the Download button, a notice and acknowledgement of exporting PHI will appear. You must click on the acknowledgement box and, then accept and continue to move forward with dowloading. The PHI export acknowledgement dialogue will appear every time you utilize the download feature. Next a pop-up window will appear with three sections: Required Fields, Optional Fields, and a section with the Excel download option. The Required Fields are data elements that will always be included in your download. The Optional Fields allow you to pick and choose your preferred data elements. If you prefer to use all or none of the data elements in the Optional Fields, you can click on the Select All or Select None options. Below the Select All and Select None buttons you can save your preferred data element fields as your download default. Once you have selected your preferred data element fields, click on the Excel button to download the document.



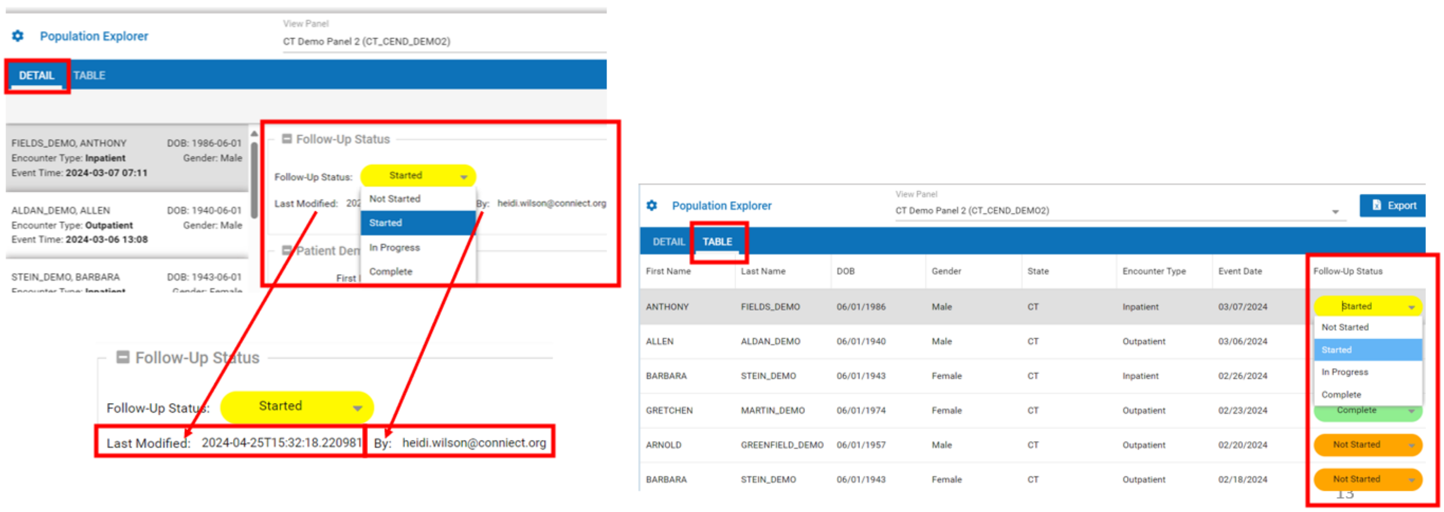
## Launching Explorer

To launch the Population Explorer application, either select the patient encounter or select the blue expansion bar on the left side of the Population Explorer widget. You can hide the widget in the portal dashboard by selecting the arrow at the bottom left blue expansion bar.



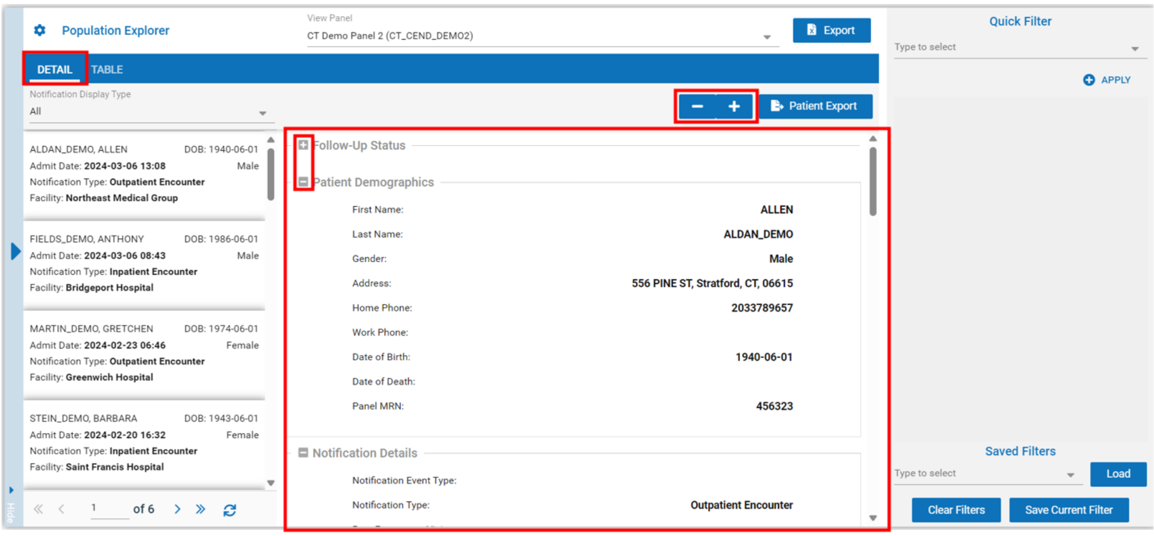

## Status Updates

Track your patient status as you review their encounter. Once you have selected the Encounter Notification Management box in your default settings, you can update the status of your patient from the Detail patient encounter tab and from the Table view tab. You can view the last modified status and who updated the status below the Follow-up Status from the Detail view. Status updates will also be available to download.

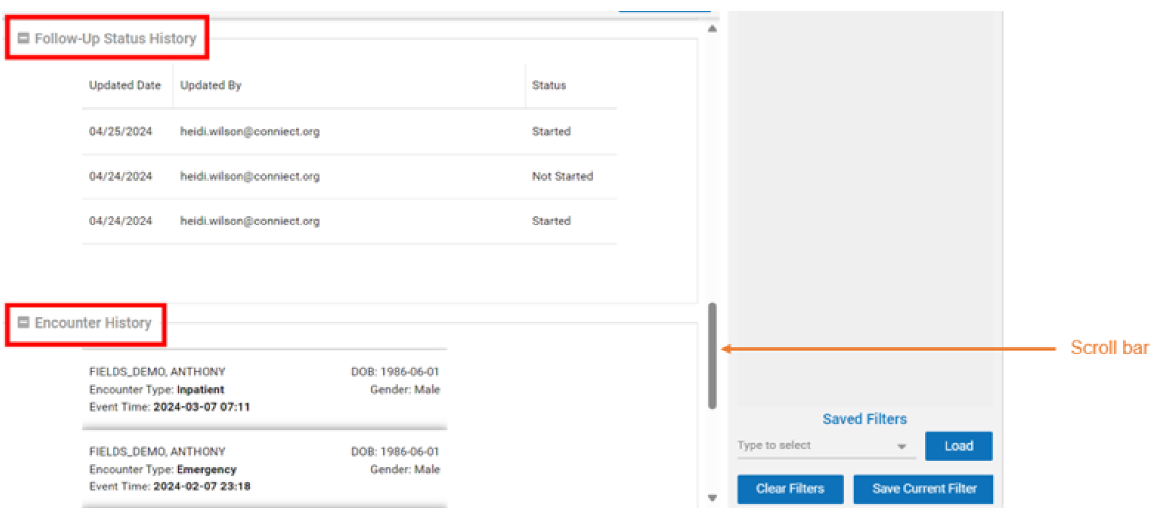


## Detailed Encounter View

Clicking on a specific patient encounter notification from the widget or in the detailed view will open the patient's encounter detail view which will expand on the patient's demographics, selected encounter details, diagnosis details as well as the patient's encounter history for the past 6 months. The detailed view will also include the patient's follow-up status.By selecting the negative or positive icons, you can collapse or expand all the patient's encounter details. Note that each section has the ability to expand or collapse.

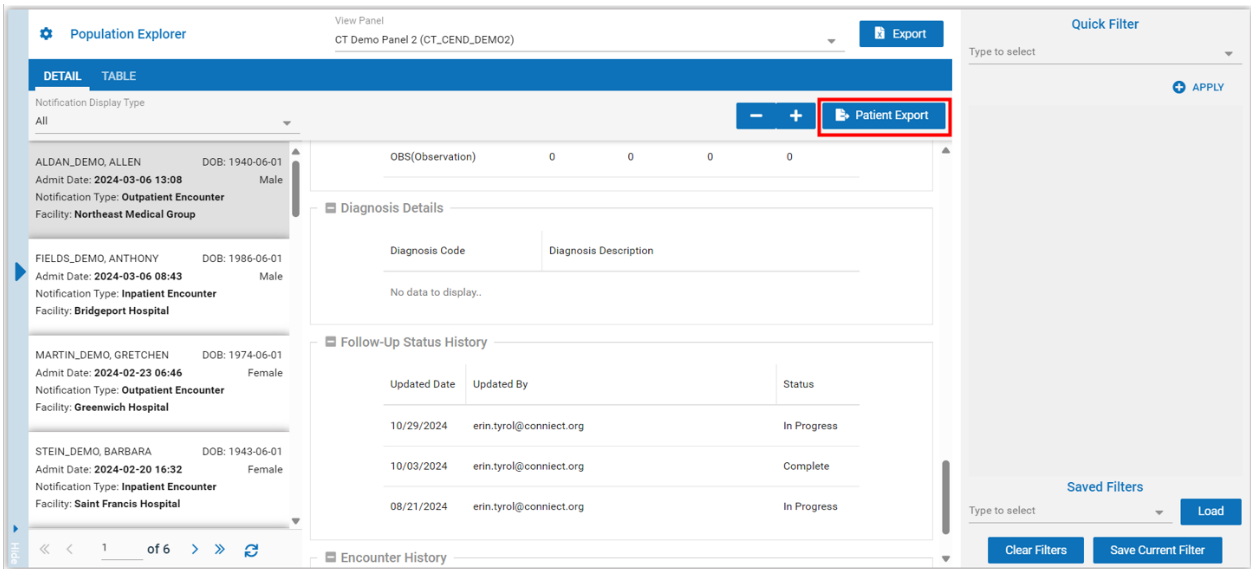



Use the Scroll Bar to reveal the Encounter History, Follow-Up Status History, and additional encounter details. Selecting a different encounter under the Encounter History will display that encounter's detail view.

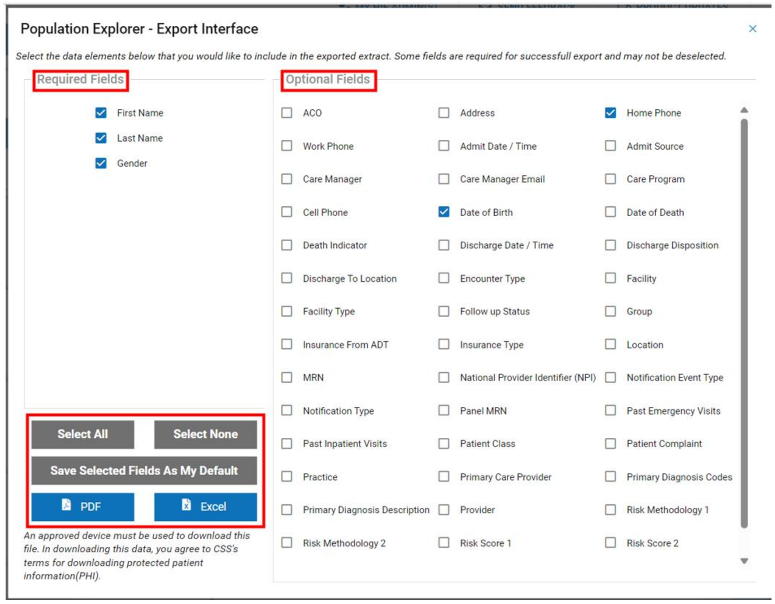


## Export the Detailed View

The encounter detail view can be exported into a PDF or Excel document by selecting the Patient Export icon.

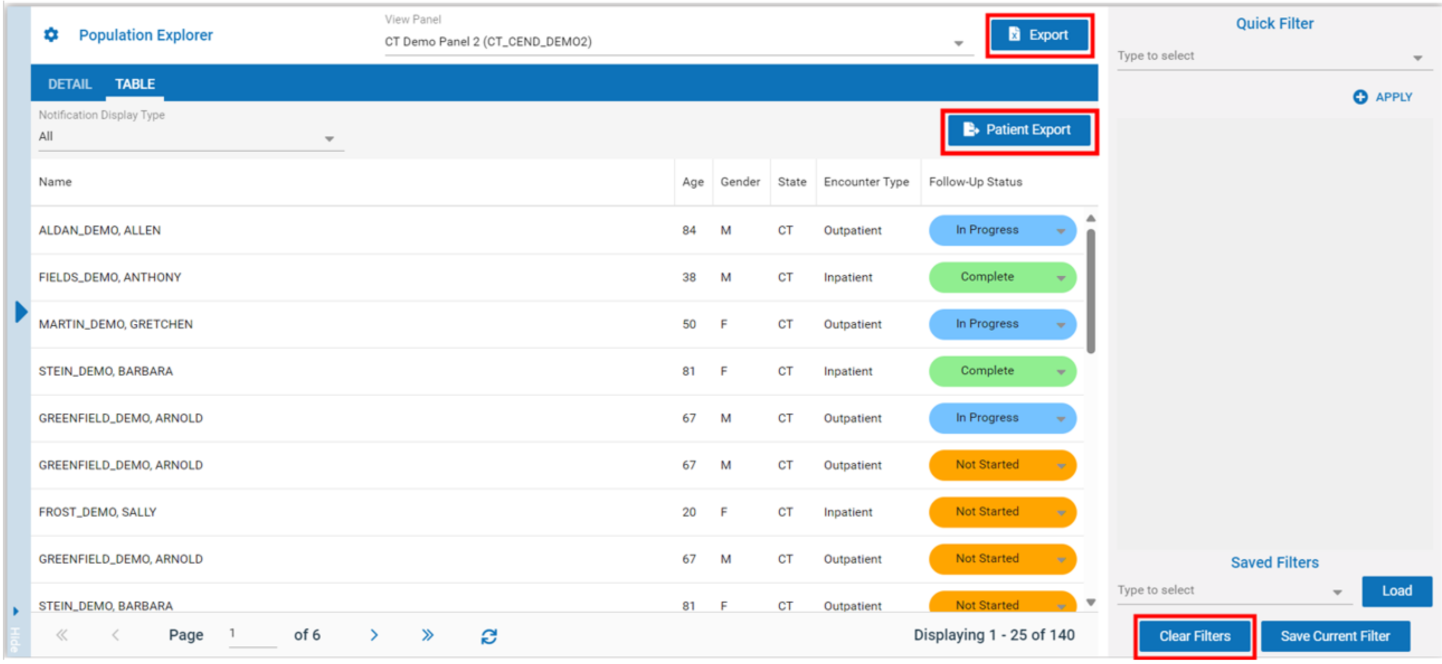



After selecting the Export icon, the same pop-up window for downloads will appear as described in the download for the widget view. However, a PDF download option will now be available (only for the Detailed View).



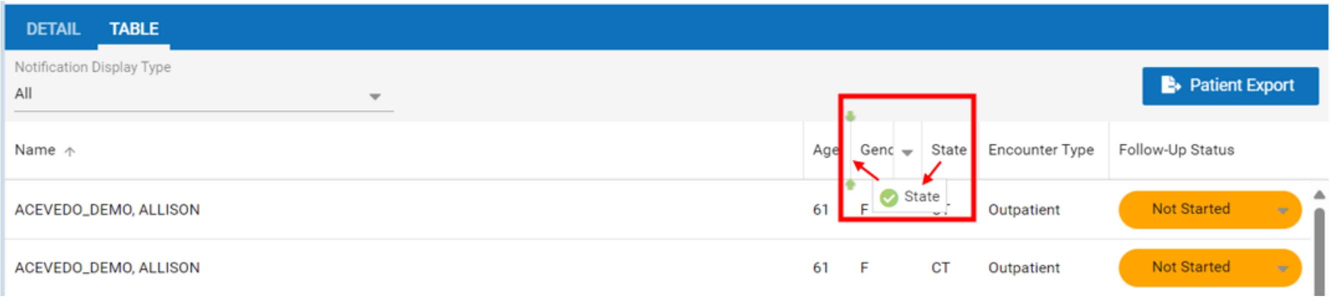
## Table View

The Table View displays Connie Alerts in a worklist. You can download up to 5000 rows from the Table View based on your panel settings. Any filter applied to your list will be reflected when downloading. Clear your applied filter before downloading for a full list of patient encounters. Additionally, you can download individual patient encounter detail into a PDF or Excel document by selecting the Patient Export Icon.

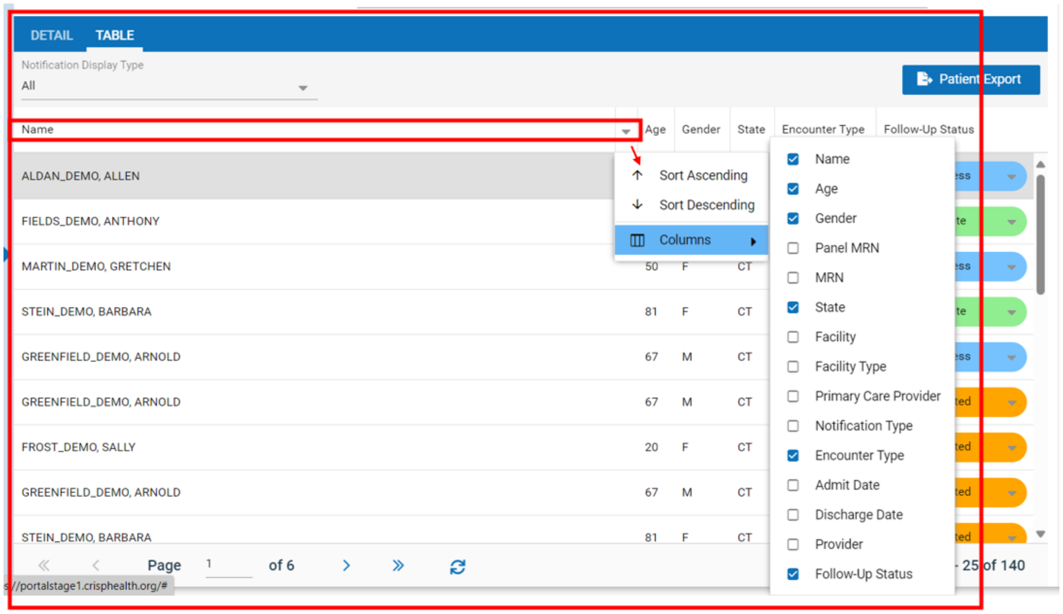



Additional features of the Table view include:

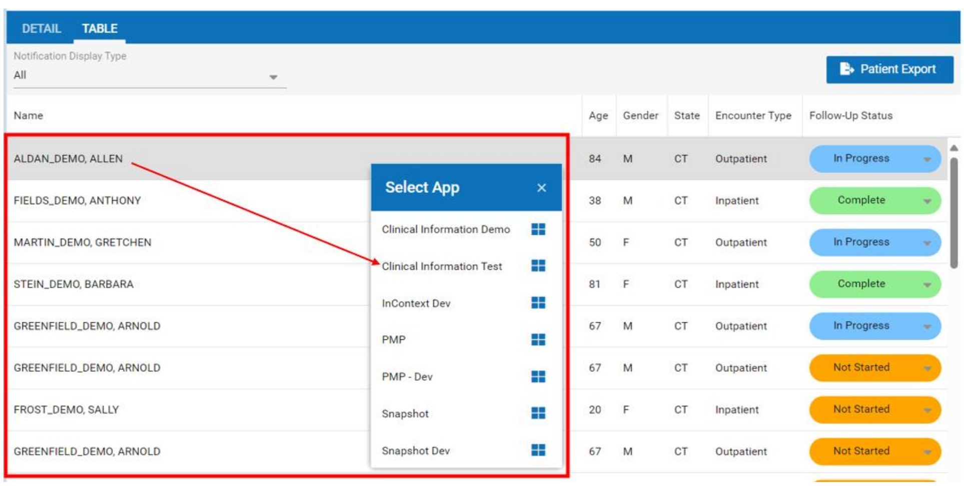
- Drag and move columns to your preferred location.



- Select the drop down arrow by a column to sort a column by ascending or descending order and add additional columns.

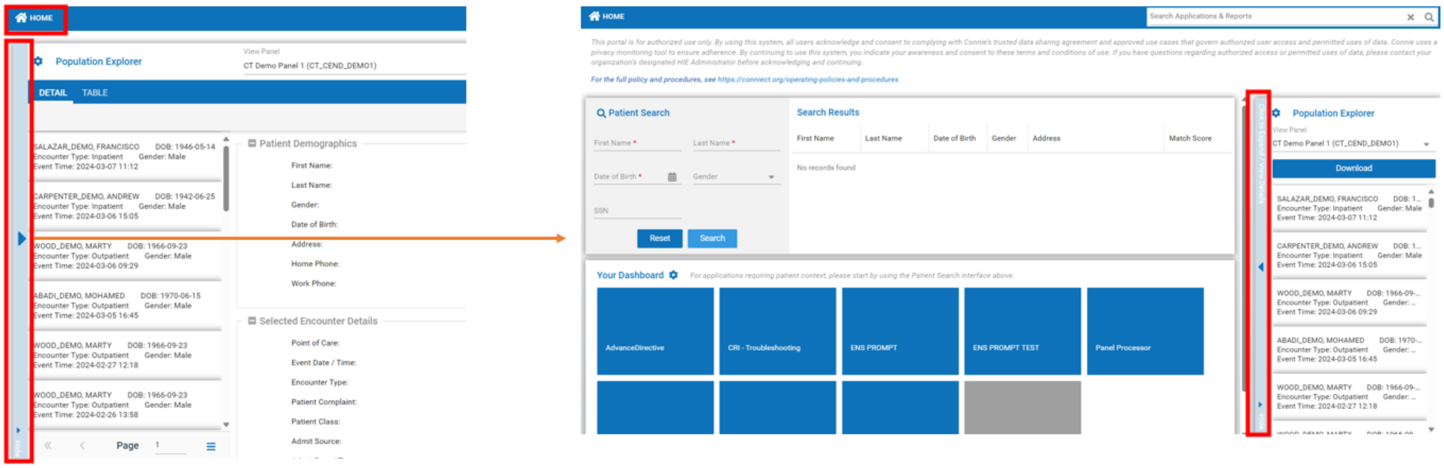



- Navigate to Clinical Information by right clicking on a patient



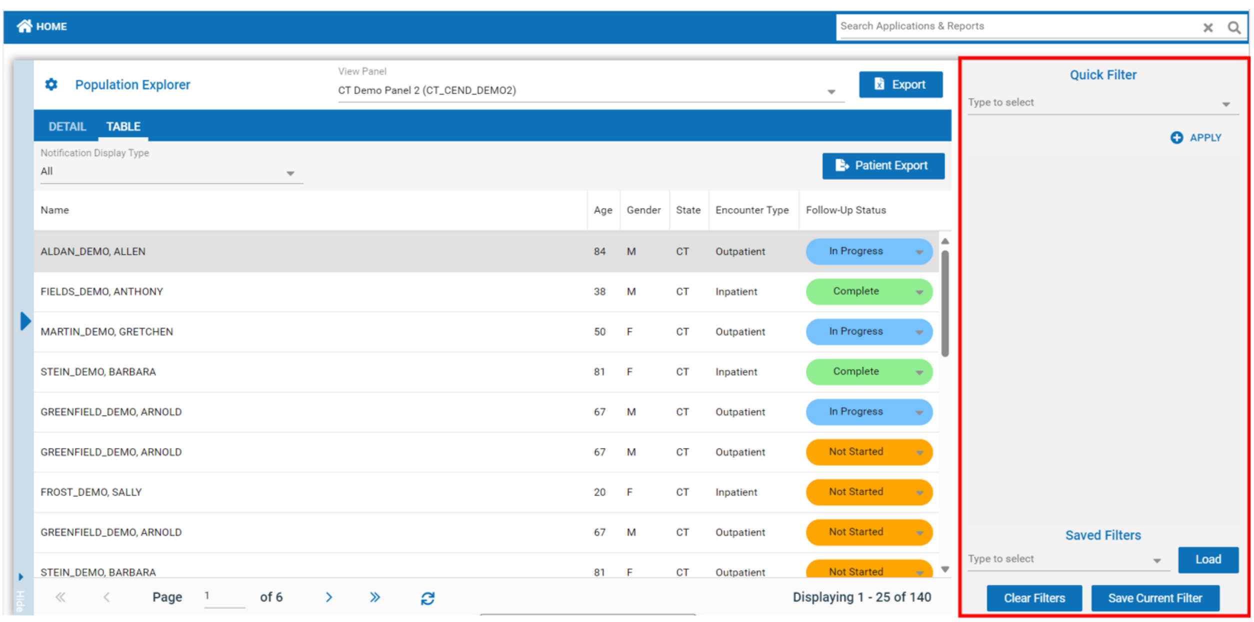
## Expanded and Normal Views

To return to the Home page, select the blue expansion bar to the left of the screen or select “Home” at the top left corner of the portal.



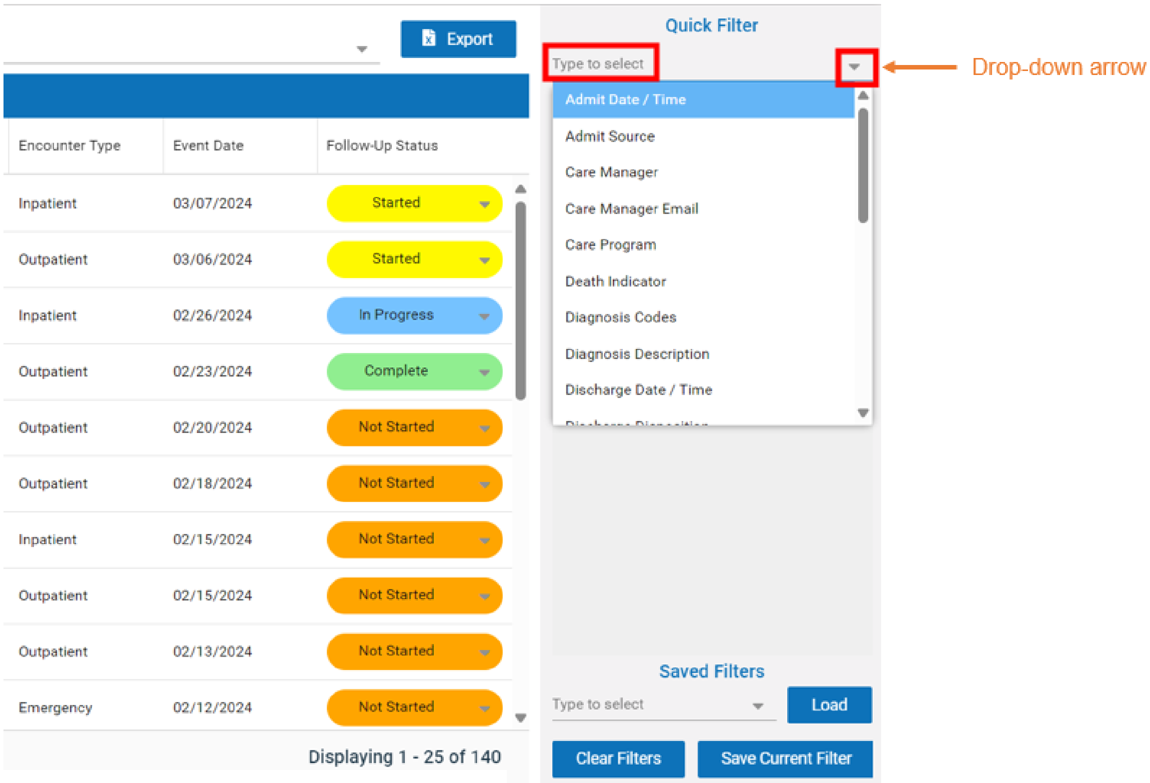

## Quick Filter

Quick Filter offers the ability to customize, save, and modify filters by specific data elements to an encounter notification list. Quick Filter pane is located to the right of the Detail and Table view. You can also delete any Quick Filters previously created.



## Create Filter

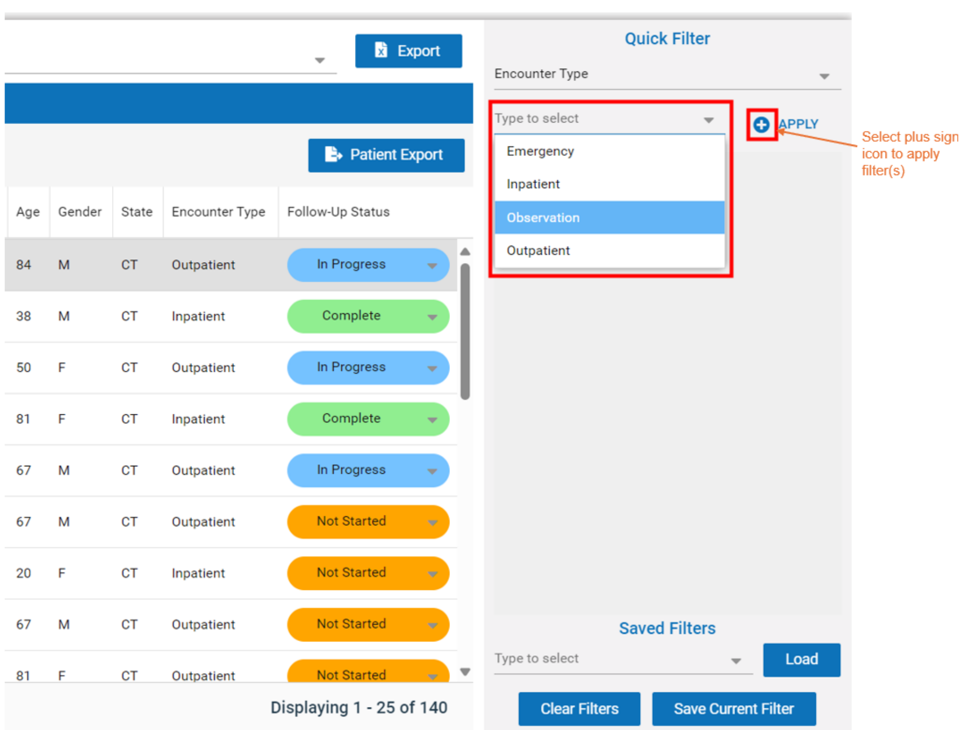
**Step one:** click the drop-down arrow next to the first "Type to select" row and choose from the available data elements list (criteria can be found in the Glossary of Filters and Criteria section).




## Create Filter

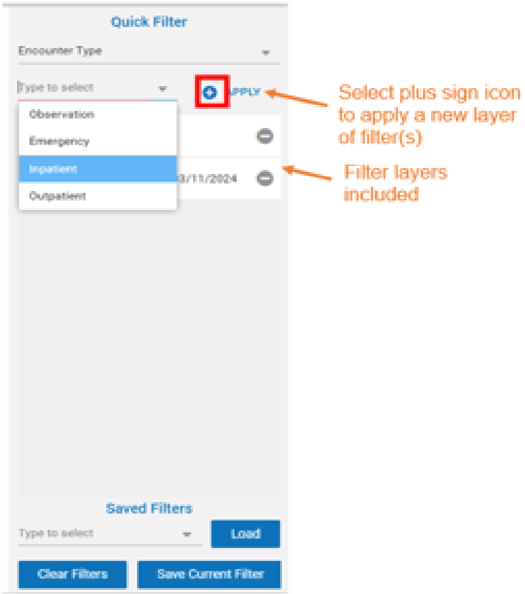
**Step two:** either free type or choose from a drop-down list in the second "Type to select" row below the data element to identify the filter criteria for the element selected in step one.

**Step three:** click the plus sign icon to the right to apply the filter.



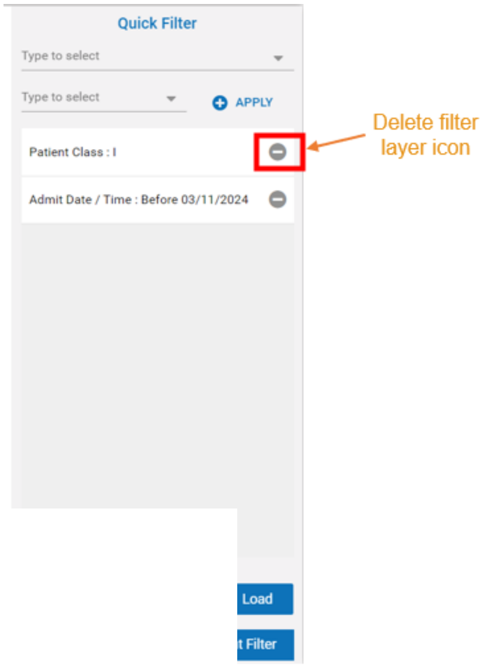
## Layered Filters

Filters can be layered, with no limit to the number applied simultaneously to your list. Filters are applied as "AND" criteria. After selecting the plus sign icon, repeat steps 1-3 above until you have added all your desired filters. Patients applicable to the filter(s) will populate in both the Table and Detail view. Filtered patients can be downloaded to a CSV file.




## Remove Filter

To remove a filter layer, click on the delete icon next to the filter.



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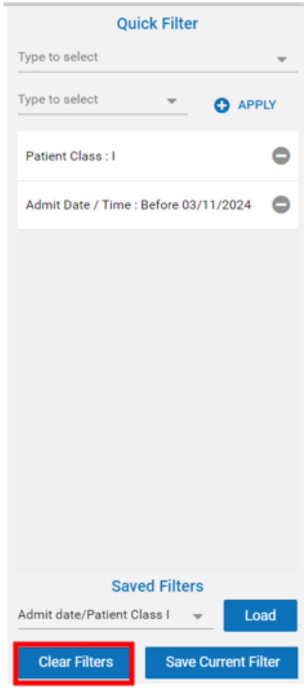
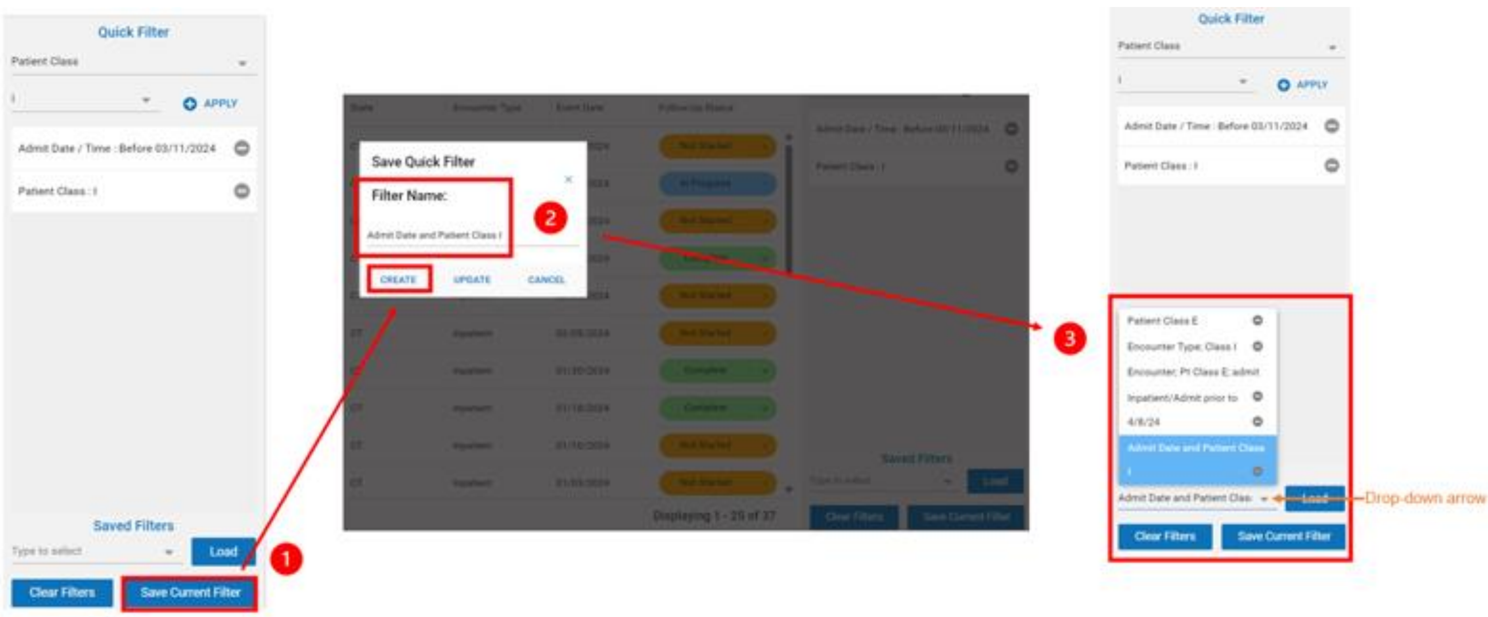
## Remove Applied Filters

To clear all applied filters, click the Clear Filters button in the bottom left corner of the Quick Filter pane. This will remove all applied filters but will not impact your list of saved filters.



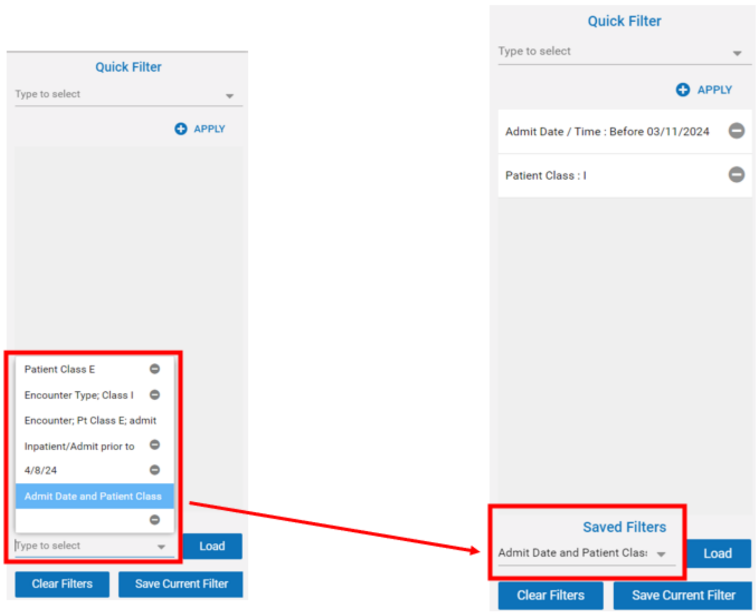

## Saving Filters

To save a current filter, click the Save Current Filter button in the bottom right corner of the filter pane. Create a filter name and then click on CREATE to save the filter. The filter is now saved under the SAVED FILTERS drop-down list.



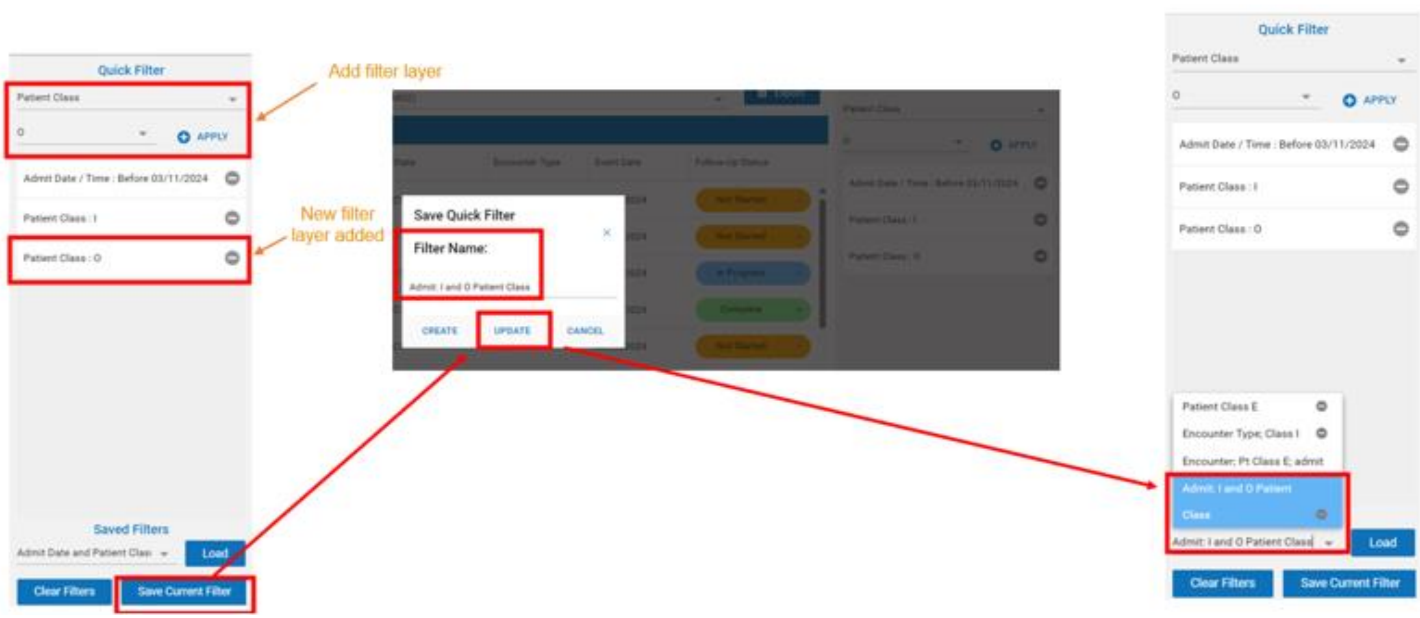
## Apply Previously Saved Filter

To apply a previously saved filter, click on the drop-down arrow under Saved Filters and select your filter, then click the Apply button. The criteria from the saved filter will then appear under the Saved Filters list. Please note, applying a previously saved filter will override any filters in place at the time the saved filter was applied.



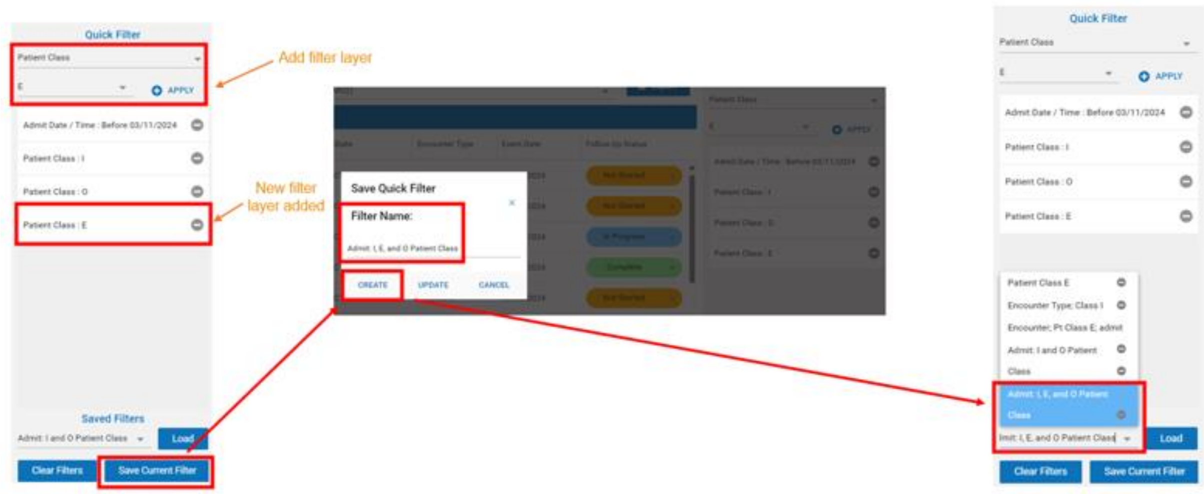

## Update a Saved Filter

To update a saved filter, you can edit, add and delete filters to meet your preference, then click on Save Current Filter, update the filter name (optional – the example below includes an updated name), and click on UPDATE. Your newly modified filter will be applied to the patient panel list and, also, it will be available under the Saved Filters list. Please note, selecting UPDATE will override your initial filter.



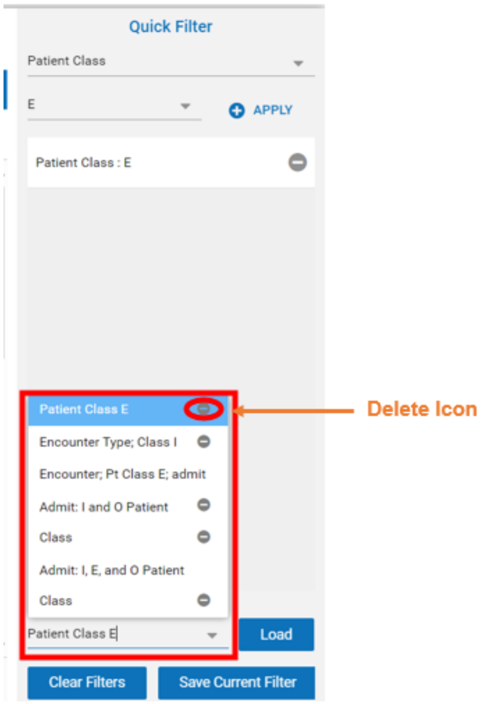
## Create a New Filter from an Existing Saved Filter

You can utilize an existing saved filter to add additional filter criteria and save it as a new filter without overriding the initial filter. Once you've added all the new filter criteria, click on Save Current Filter, update the filter name, and click on CREATE. Your newly modified filter will be applied to the patient panel list and, also, it will be available under the Saved Filters list. Please note, if you click on UPDATE, then this will override the initial filter.




## Delete Saved Filters

To delete a saved filter, click on the drop-down arrow under Saved Filters. Click the delete icon next to the saved filter name to permanently delete the filter.



## Glossary of Filters Data Elements

| Admit Date / Time | Datetime | Value Set/Pick List |
|---|---|---|
| Admit Date / Time | Datetime | Last 1, 7, or 30 Days, etc.. |
| Admit Source | Free Text | |
| Care Manager | Free Text | |
| Death Indicator | Boolean | Y, N, or No |
| Diagnosis Codes | Code | Valid ICD-10 diagnosis codes |
| Diagnosis Description | Free Text | Valid ICD-10 diagnosis code descriptions |
| Discharge Date / Time | Datetime | Last 1, 7, or 30 Days, etc.. |
| Discharge Disposition | Free Text | |
| Discharge To Location | Free Text | |
| Encounter Date | Datetime | Last 1, 7, or 30 Days, etc.. |
| Encounter Type | Fixed Value Set | Inpatient, Outpatient, Observation, or Emergency |
| Facility Type | Free Text | |
| Insurance Type | Free Text | |
| Patient Class | Fixed Value Set | E, I, O, or Obs |
| Patient Complaint | Free Text | |
| Patient Name | Free Text | |
| Point of Care | Free Text | |
| Primary Diagnosis Code | Code | Valid ICD-10 diagnosis codes |
| Primary Diagnosis Code Description | Free Text | Valid ICD-10 diagnosis code descriptions |
| Provider | Free Text | |

## Glossary of Data Type Filter Criteria

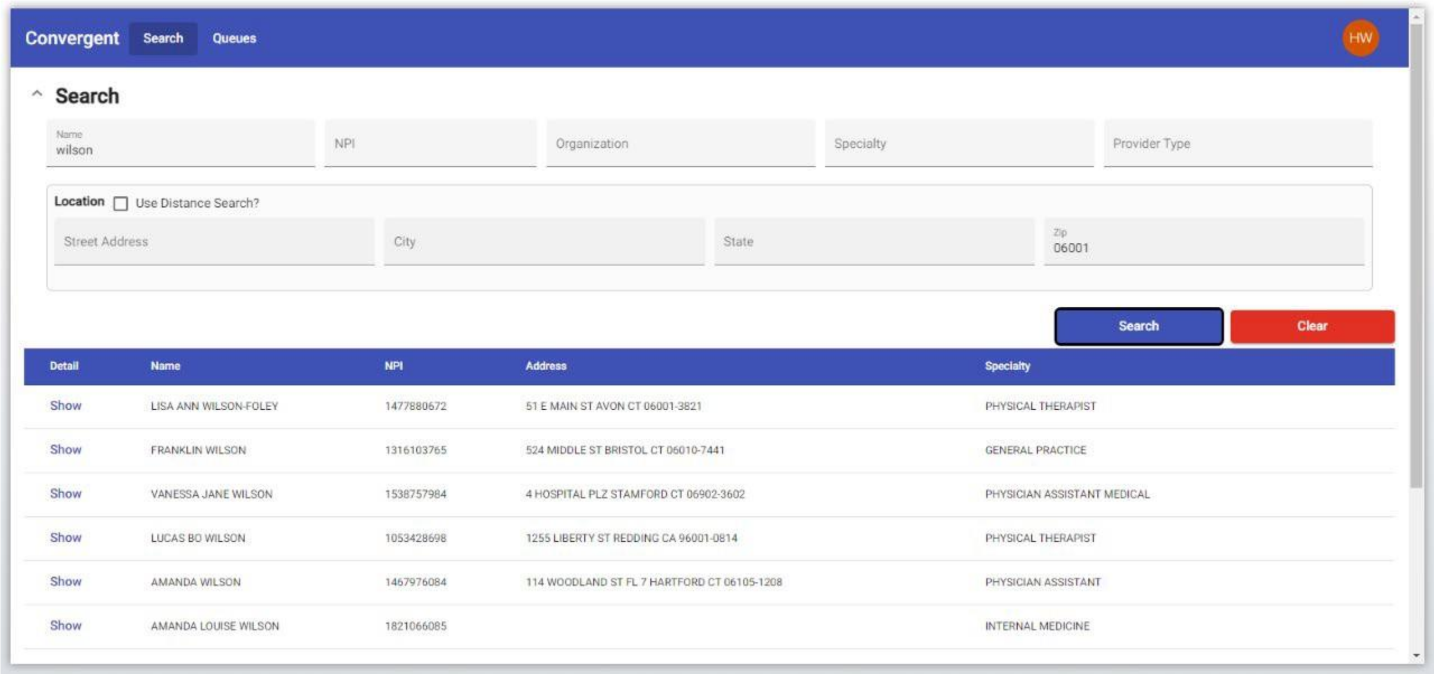
| Data Element Type | Available Criteria |
|---|---|
| Boolean | Is, Is Not |
| Date/Time | Before, After, Exact Date, Range |
| Code | Equals, Does Not Equal, In, Not In |
| Fixed Value Set | Equals, Does Not Equal, In, Not In |
| Free Text | Starts With, Ends With, Contains, Does Not Contain, Equals, Does Not Equal |

## Provider Directory

The Provider Directory is a quick and easy-to-use search tool used by providers to search and find other providers. The directory listings are a composite of hundreds of national and regional provider datasets to ensure a robust database of provider information using the Convergent platform.

You can search providers using the following fields:

- Name
- NPI
- Organization
- Specialty
- Provider Type
- Location: Street Address, City, State, Zip

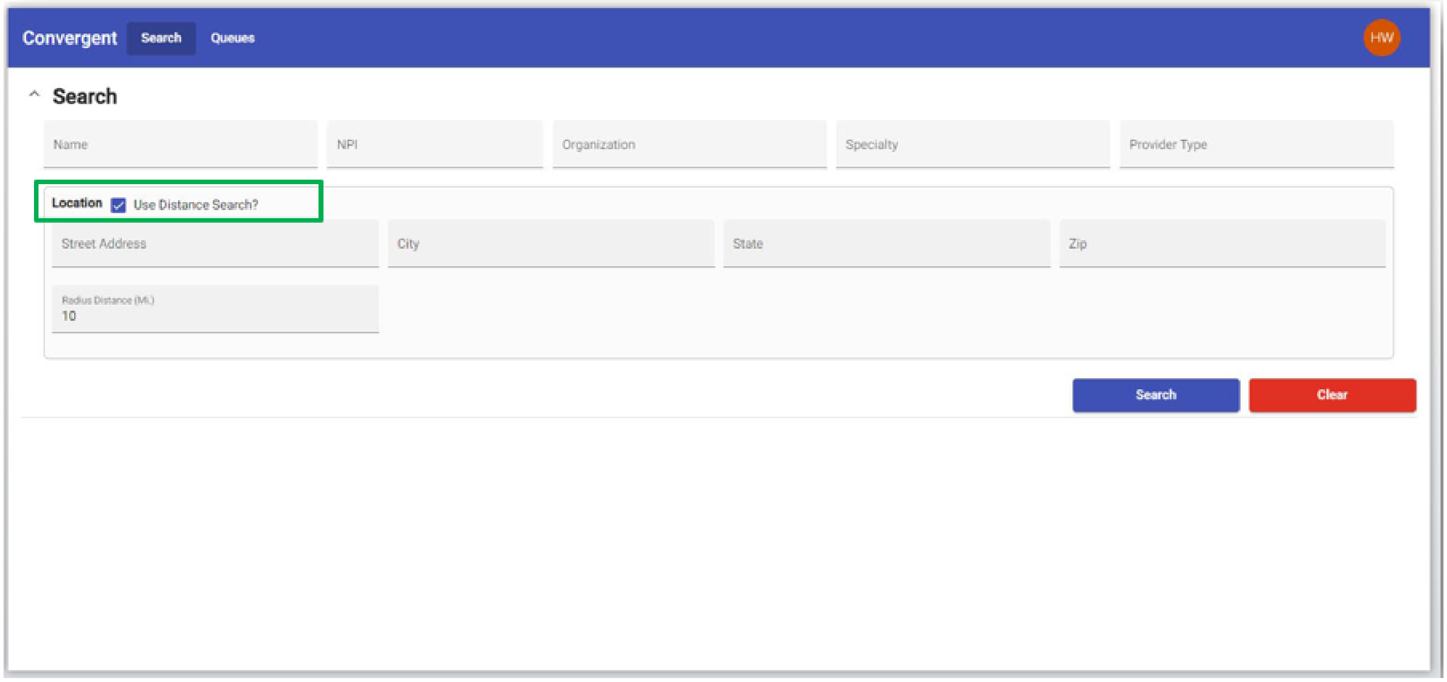



When you conduct a search with more than two fields, it will behave as an “AND” search. For example, searching on name “John” with state “CT” will return all the providers with name “John” AND from the state “CT.”

Once you include any of the search parameters in the search fields, you will notice the ‘Search’ button becomes accessible. Connie Provider Directory allows for a misspelled name, partial names and either first name or last name to be added to the search field.

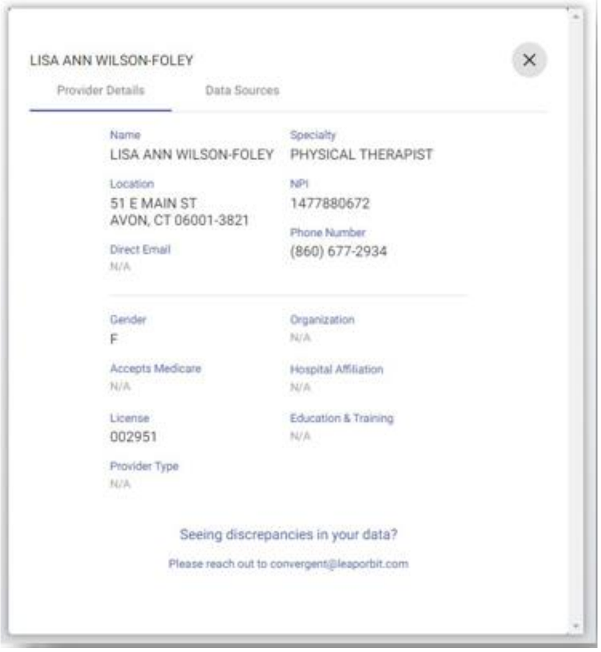
To use the distance search option, you will need to include either a full address or a zip code.

Activate the distance search by clicking the "Use Distance Search" checkbox. You must include the radius distance in miles in the search field.




To see more detailed information about a particular provider, select “Show” under the “Detail” column in the results.

The Provider Details screen will show more information about the selected provider.



If you conduct a search which yields many results, you can use the page navigation tools to:

- Show more items per page.
- Navigate forwards or backwards.
- Or jump to the first or last page in the search results.

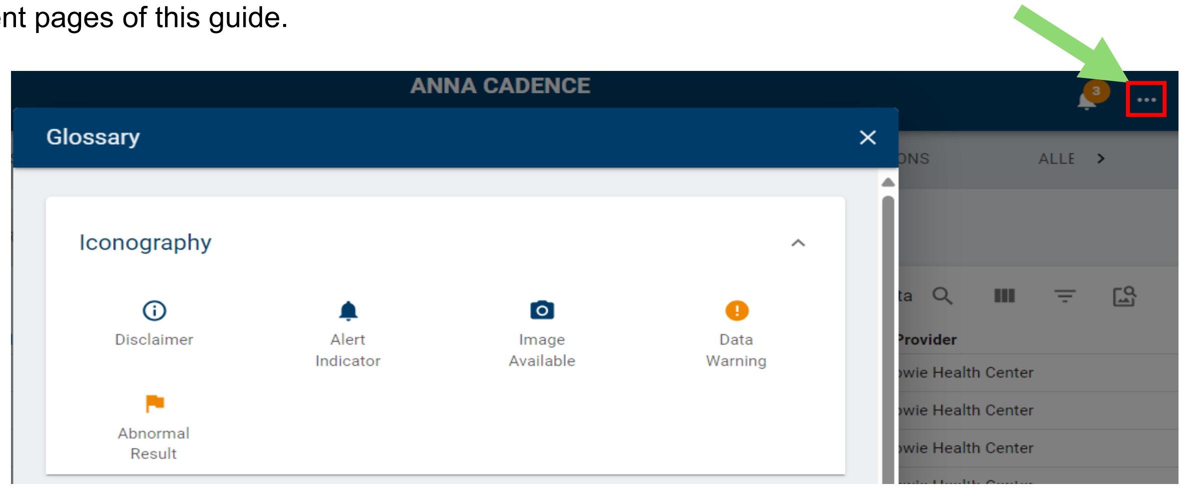
If at any point, you want to clear your search results and begin a new search, simply select the ‘Clear’ button to begin a new search, which will bring you back to a new search page.

# Connie Apps: Available After Patient Search

## Clinical Information App

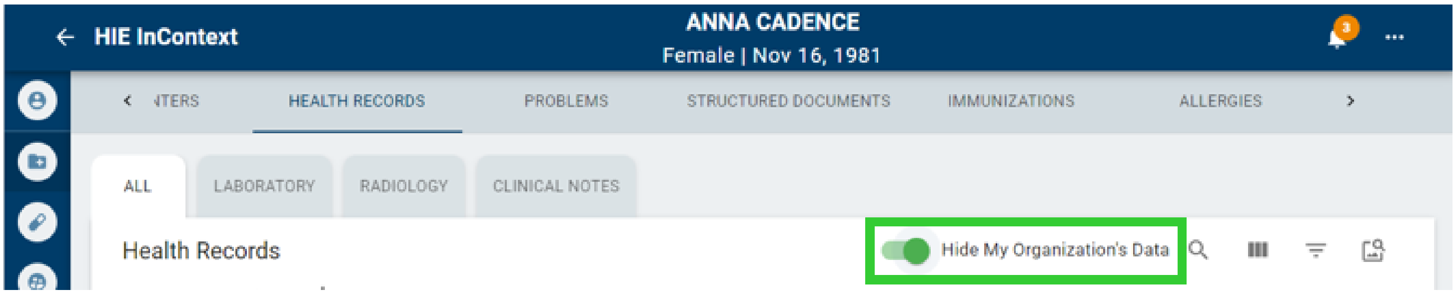
The ‘Clinical Information’ app defaults to your patient’s Encounters in the ‘Clinical Data’ view, but provides access to patient demographic information, the care team under ‘Care Coordination’, ‘Medication Management’ and the Prescription Monitoring Program (PMP).

Click on the 3 dots to the right of your patient’s name to access the glossary for this app, including descriptions of the sections and explanations of the icons. The icon descriptions are also described in the ‘Icon’ section of this user guide. The descriptions of each ‘Clinical Information’ section are also listed in the subsequent pages of this guide.

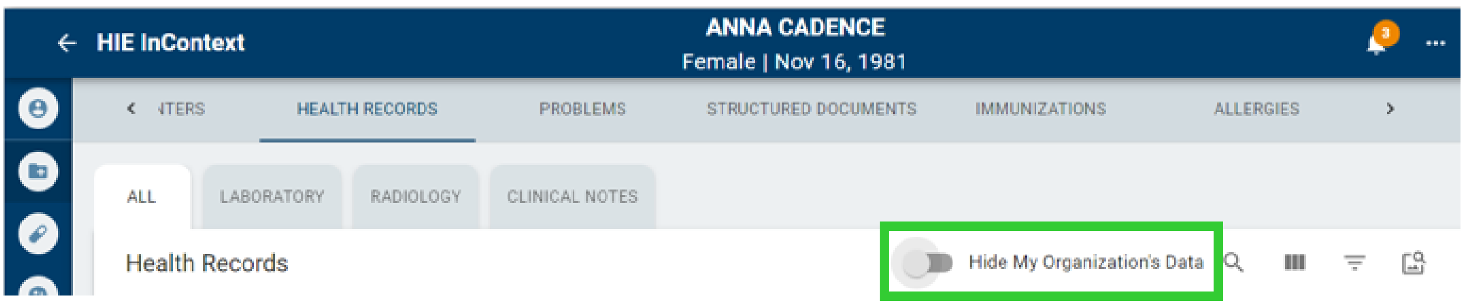


## Hiding Organization’s Data

You have the ability to hide data sent to Connie from your own organization so you can view only data that comes from outside your organization. This feature applies to the Encounter, Health Records, and Structured Documents tabs. To apply this feature, click on the button next to “Hide My Organization’s Data.”

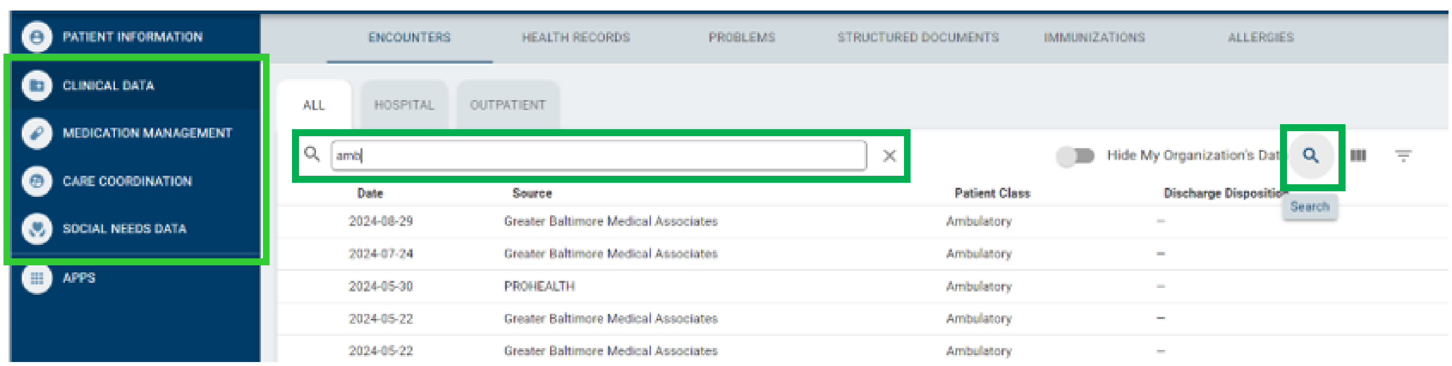



Once selected, only data from outside of the facility from where you’re accessing patient records will display in the Connie portal. To undo this filter, simply click again on the button next to “Hide My Organization’s Data.”



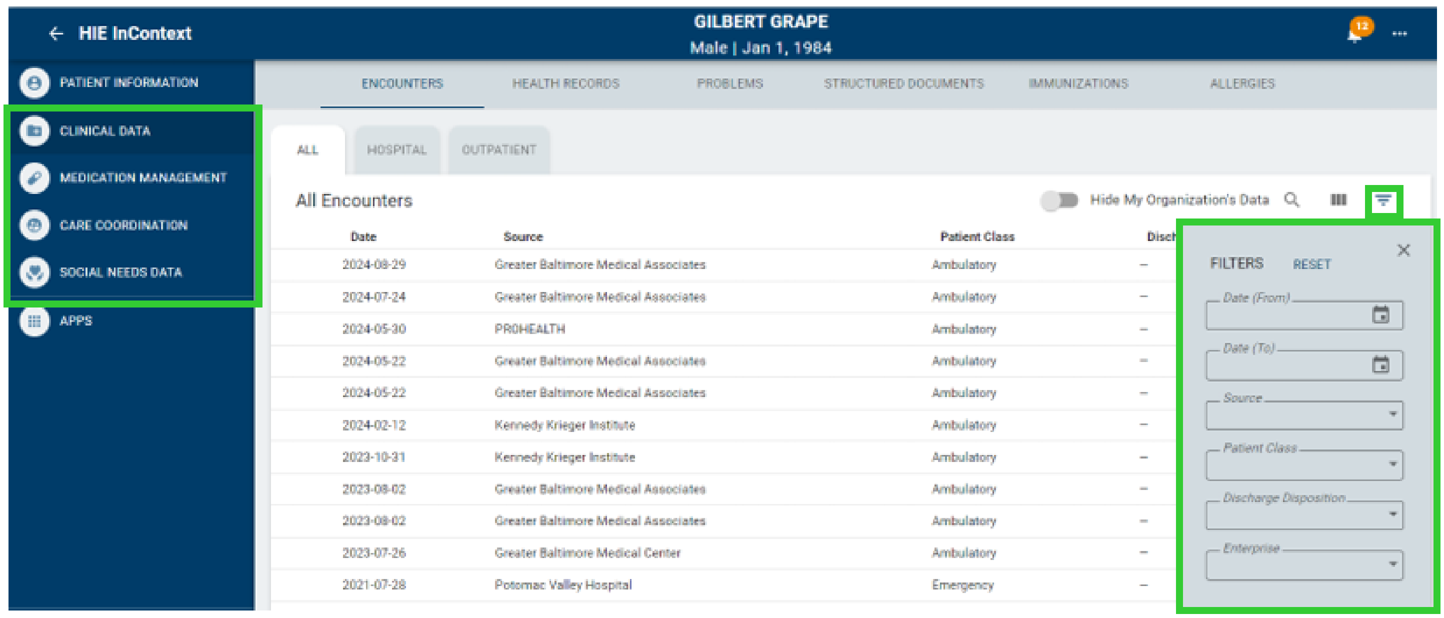

## Table Views, Search and Filtering

The search icon is available in all areas of Clinical Data, Medication Management, Care Coordination, and Social Needs Data. This icon allows you to search for information in the contents of each area.



The view columns icon is available in all areas of Clinical Data and Social Needs Data. This icon allows you to add or remove available columns.


The filter icon is available in all areas of Clinical Data, Medication Management, Care Coordination, and Social Needs Data. The filter can be used to filter results based on each of the column types.



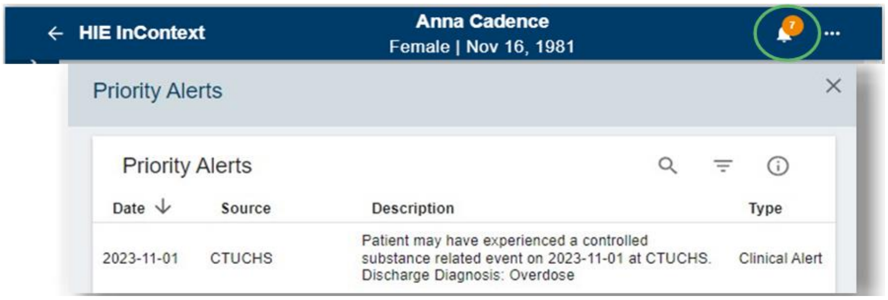
## Clinical Alerts

Clinical Alerts are designed to notify healthcare providers about past instances of overdose. These alerts are triggered when a patient arrives at the emergency room and their diagnosis indicates an overdose event, as determined by ICD 10 codes.

Clinical Alerts can be seen on the top toolbar. By clicking the “Priority Alerts” icon (depicted as a bell) a text pop-up screen will appear. The Priority Alert icon will indicate the total number of alerts associated with the patient.

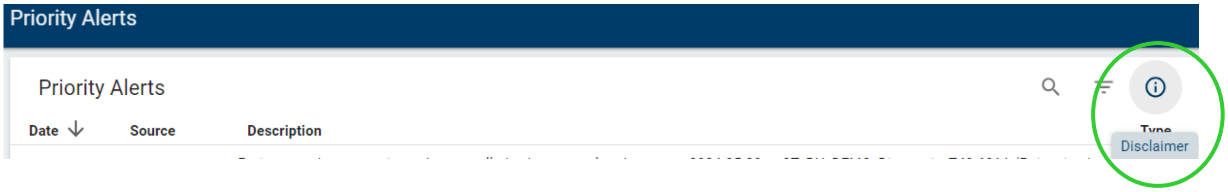
Within the pop-up screen, the priority alerts are presented in a table format, organized chronologically based on the date of the most recent alert, source of the alert, a description of the event, and the type of alert.

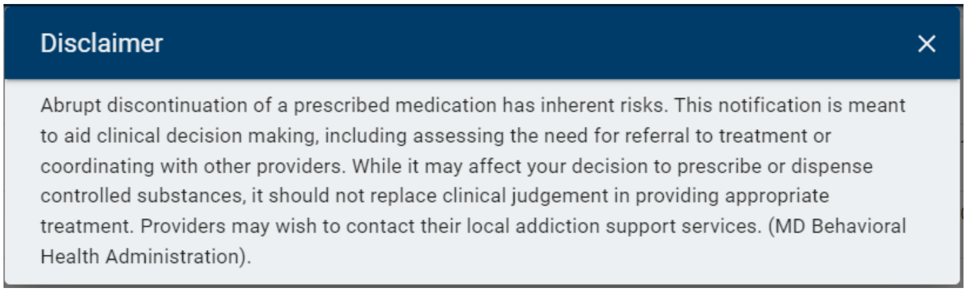
In cases where there are no alerts for a specific patient, clicking on the priority alerts icon will not trigger any pop-up screen.




### Disclaimer Icon

The Disclaimer icon can be seen at the top right of the Priority Alerts table. Its purpose is to flag that although the alert may affect decisions to prescribe or dispense controlled substances, abruptly discontinuing medications could also carry risks.

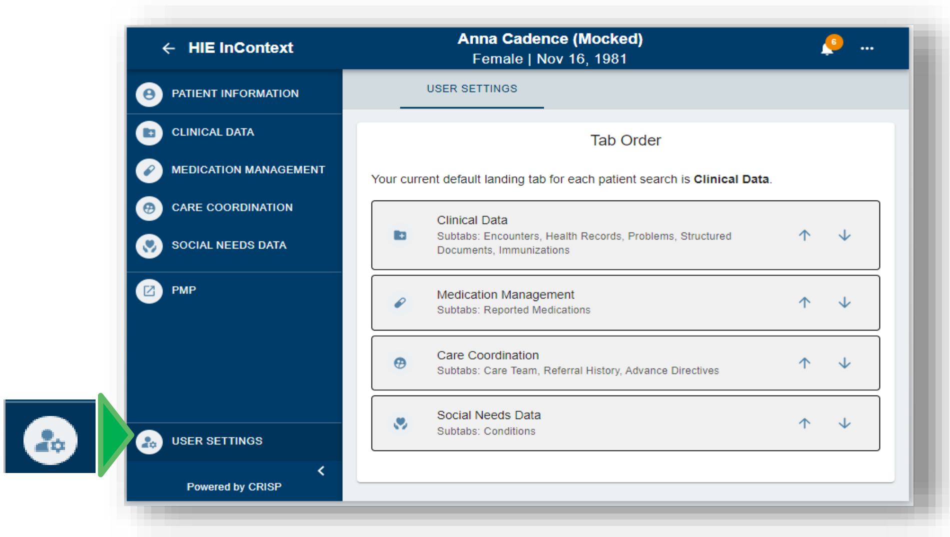


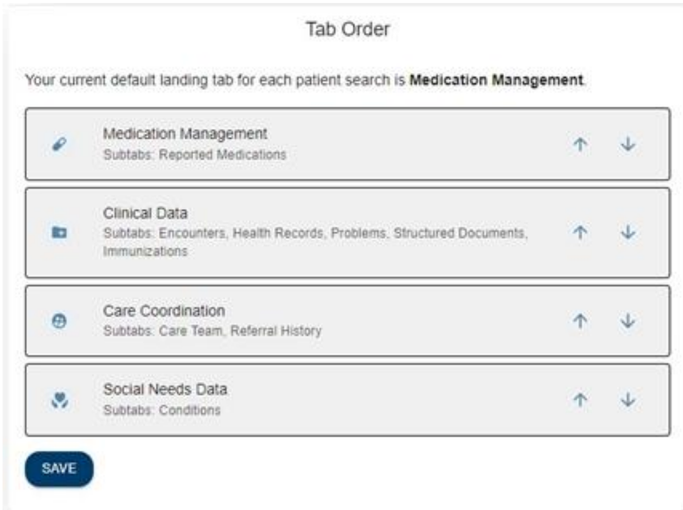
## User Settings

Navigate to the User Settings section using the button at the bottom of the Clinical Information left hand navigation.

Here, you can re-arrange the order of the sections within Clinical Information clicking the up and down arrows next to sections listed.




Once you have changed the order of sections, you will see a 'save' button. Selecting 'save' updates the new order immediately, with the first listed section becoming the default landing page. In the given example below, Medication Management was moved to the top of the list, changing the default landing page from Clinical Data to Medication Management. These updates are specific to your view of the application and will not change how other users see the sections. The order you set will remain consistent every time you launch the application until you make a new change in the arrangement.



## Patient Information Section

The ‘Patient Information’ Section aggregates the demographic information we have in the ‘Master Patient Index (MPI)’ for your patient. Data in the MPI is pulled from multiple sources and organizations for your patient.

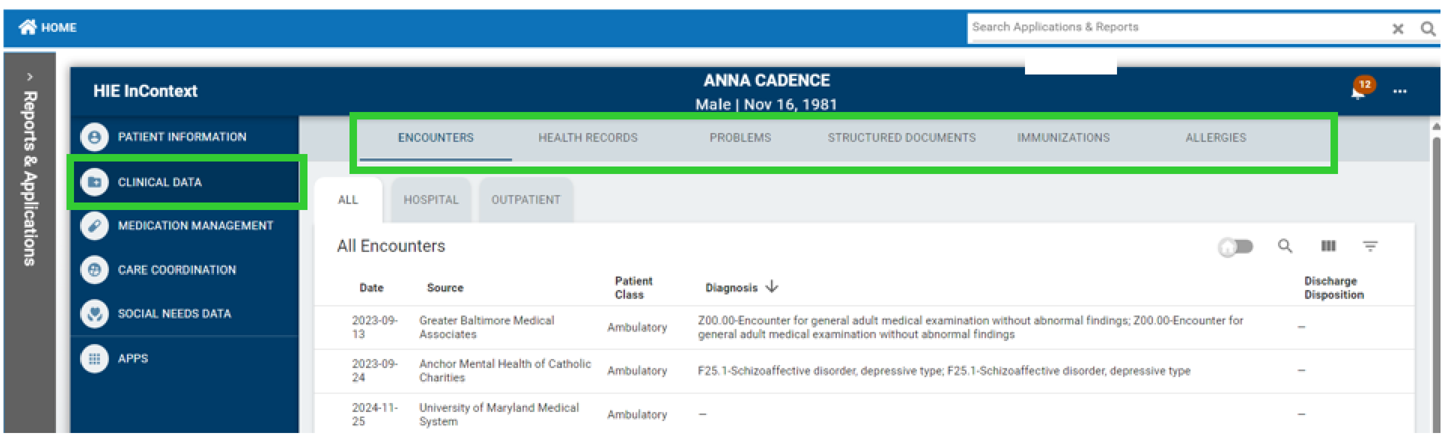

The ‘Next of Kin’ area of the ‘Patient Information’ section aggregates any next of kin information received from participating organizations on your patient.

## Clinical Data Section

There are five areas of the ‘Clinical Data’ section, and each area may have one or more sub-tabs of data for you to see on your patient.

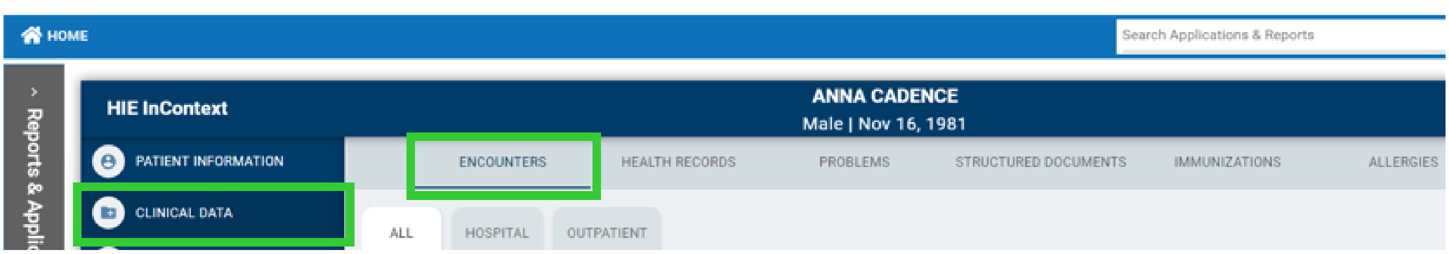
The five areas are:

- **Encounters**
- **Health Records**
- **Problems**
- **Structured Documents**
- **Immunizations**
- **Allergies**

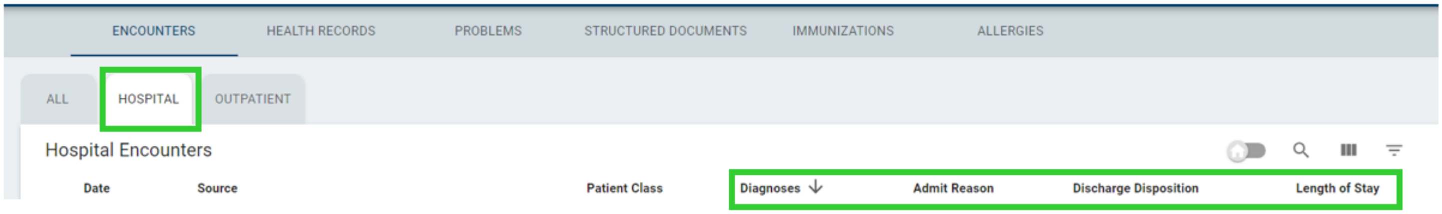


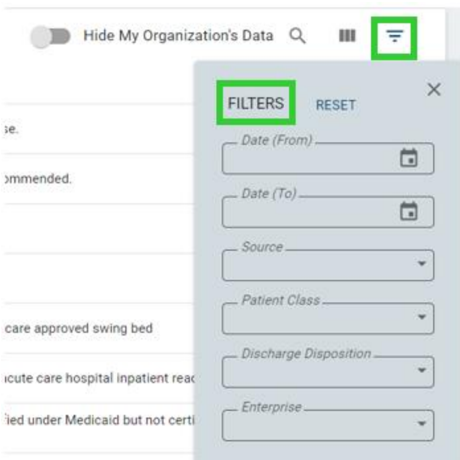

## Encounters Tab

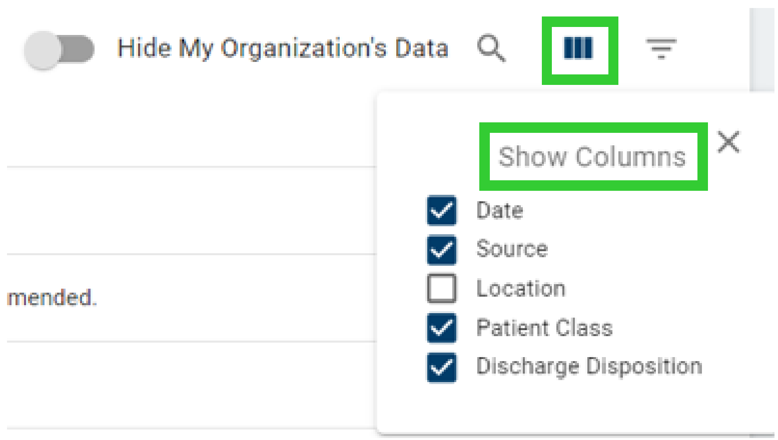
‘Encounters’ displays information regarding your patient’s previous inpatient or outpatient encounters, identified through ADT data. This includes date, source, patient class, and discharge disposition on the ‘All Encounters’ sub-tab. Using the ‘View Columns’ icon, you can also add ‘location’ to the table.



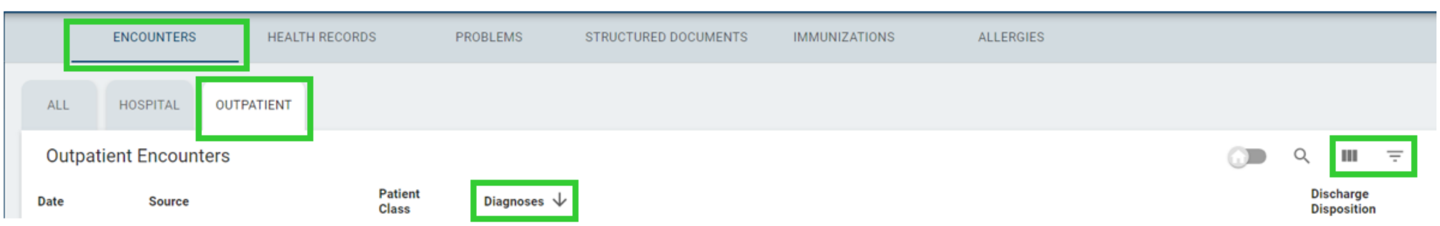
When you click on the **'Hospital Encounters'** sub-tab, Connie filters out encounters to only show you encounters associated with a **hospital visit**. The table columns include diagnosis, admit reason, and length of stay. 'Status' is currently hidden on launch but can now be added via the filter options if desired. Using the 'View Columns' icon, you can also add 'Location' to the table.



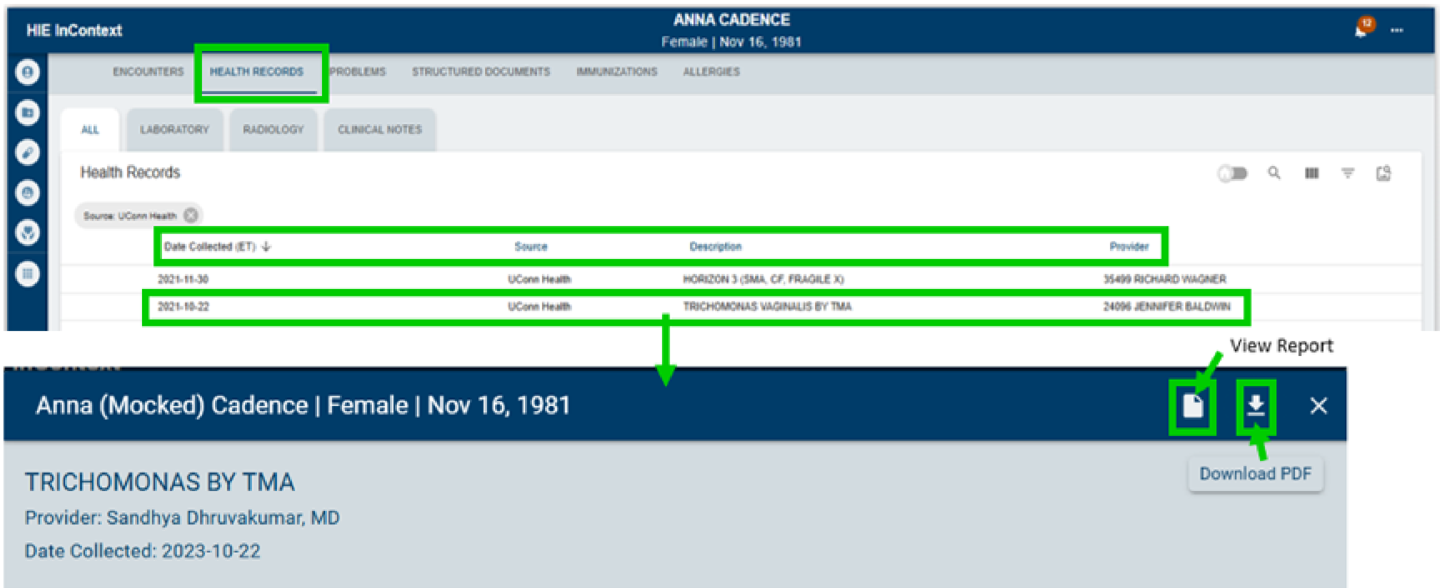

When you click on the **'Outpatient'** sub-tab, Connie filters encounters to only show you encounters associated with **outpatient visits**. This table includes the diagnosis code associated with the visit. Using the 'View Columns' icon, you can also add 'Location' to the table.



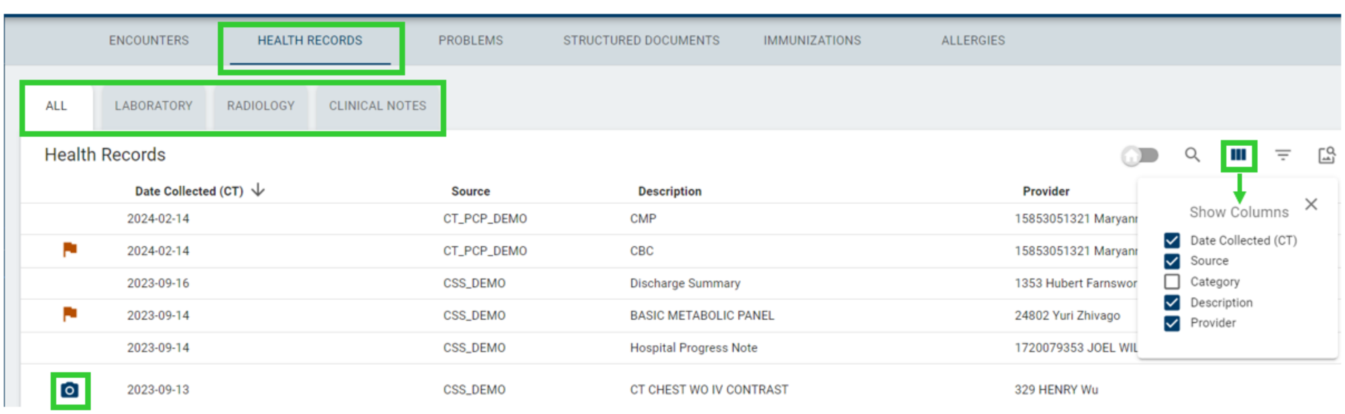
## Health Records Tab

‘Health Records’ displays your patient’s radiology reports, laboratory reports, and clinical notes received from Connie participants.

The table view includes date, source, description, and provider. Clicking on any row in this table will open a pop-up window that will provide you the detailed text of the report. Depending on the type of document you open, you will find additional options to download an attachment, open the image viewer (for radiology reports with an image), preview and/or download a PDF of the document, or close the popped-up dialog box. You can view the PDF report in a Health Record before choosing whether or not to download. Please keep in mind that this feature is not available in an Internet Explorer 10 browser. However, you can still download the file in PDF form using the download icon.




The default display is to show you all health records for your patient sorted in descending order by date. Toggling on any of the document types at the top of the screen functions as a preset filter. For example, by clicking on the laboratory document type, the table will filter results to only show you lab results. Using ‘View Columns’ you can also add ‘Category’ (e.g., ‘Laboratory’, ‘Radiology’, ‘Clinical Notes’) to the table view which would enable you to sort the table by category in ascending or descending alphabetical order.



## Image Share

‘Radiology Reports’ with a camera icon indicate an image is available to view. Clicking on the camera icon will enable you to view the image. Images viewed in the last 90 days will display within seconds. Select the ‘Image Worklist’ icon for a list of all the images available for your patient, compare up to four images, and, if you have been approved by your PACS Administrator, transfer images to your organization’s PACS. Please note that when you exit out of eHealth Viewer, your changes are not saved.

For more information about the full list of features available through Connie’s Image Share service, see Image Share in the Appendix.

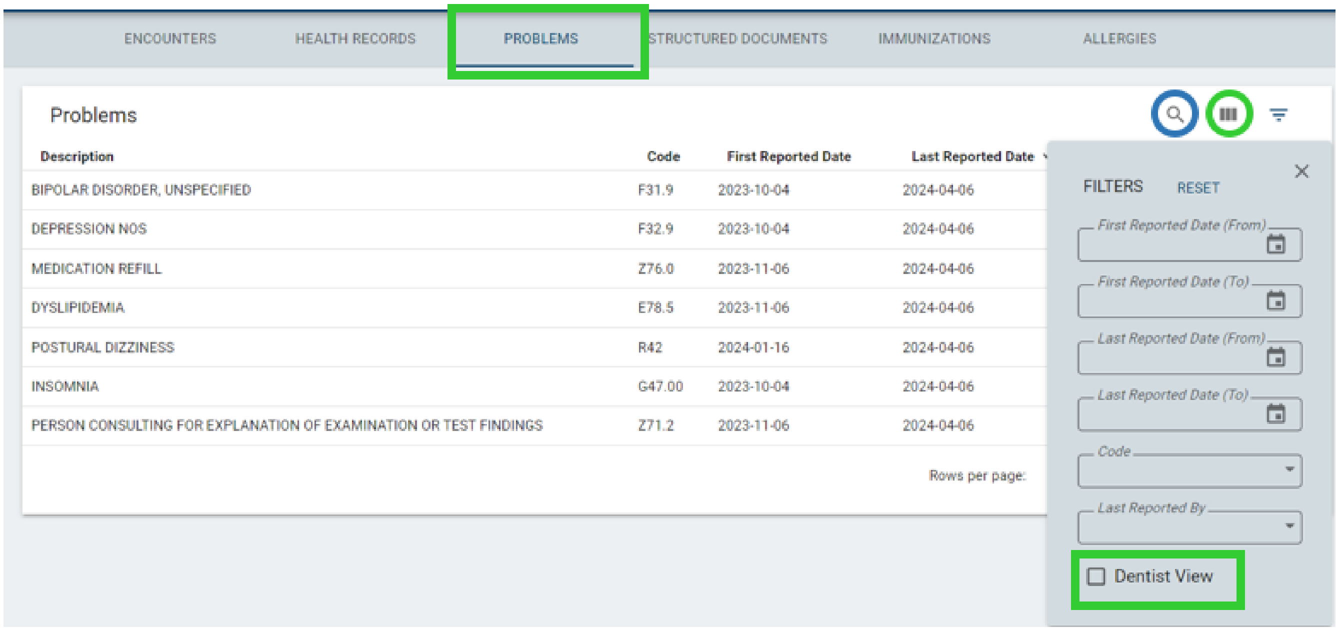
## Problems Tab

The Problems tab provides a consolidated list of active or unresolved issues obtained from Continuity of Care Documents (CCD), excluding routine patient visits. The purpose of this tab is to enable users to quickly gather relevant medical status information and inform immediate care decisions.

The 'Problems' tab contains a data table with the following fields:

- Description: Displays the description of the problem using the ICD 10 code description.
- Code: This field contains the numeric ICD 10 or SNOWMED code associated with the problem.
- First Reported Date: Shows the initial instance when the problem was recorded in a CCD.
- Last Reported Date: Indicates the most recent occurrence of the problem in the CCD, retrieved from the organization listed as the "Last Reported By" entity.
- Last Reported By: Specifies the organization that sent the CCD containing the problem.

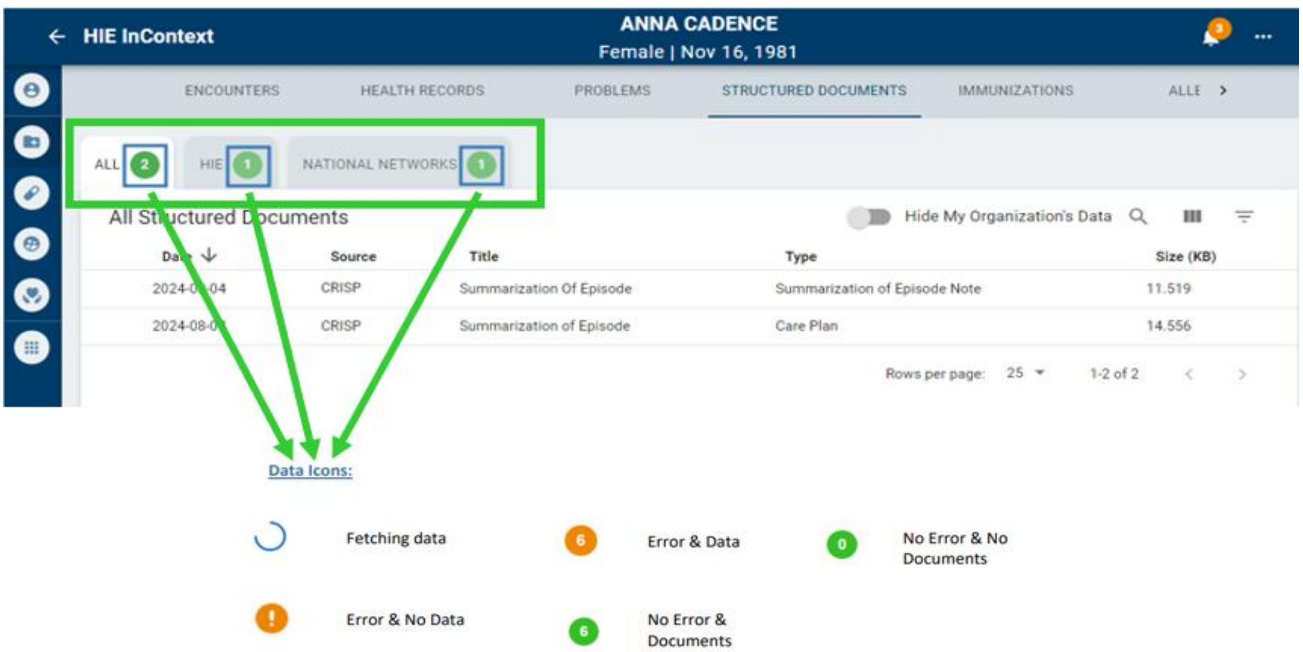
Any duplicate problems with identical ICD 10 or SNOWMED codes are eliminated, and only the last submitted CCD entry is displayed. Once a problem is resolved, all records pertaining to that problem are removed from the Problem List. However, historic records will remain in relevant source CCDs under the "Structured Documents” section.



Use the filter icon (circled in green) to narrow down the list by a date range (last or first reported), organization that last reported the problem, or ICD-10 code. The "Dentist View" filter displays a list of problems that are only relevant to dental related problems. Use the magnifying glass icon (circled in blue) to search for a specific problem either as a description or code. Enter a partial code or partial description to identify all the related problems. For example, entering "E1" or "diabetes" will return all results that include E10 and E11 codes for Type 1 and Type 2 diabetes.

## Structured Documents Tab

"Structured Documents" displays any 'Continuity of Care Documents' (CCDs[1]) for your patient from Connie participants including participants from outside the state through Connie's participation on eHealth Exchange Hub and Carequality. All CCDs are available to view by default under the "All" tab, but you can also view CCDs by HIE or National Networks by selecting those respective tabs. Each tab contains an icon (blue squares) to indicate the document load status and document amount. Additionally, the 'Structured Documents' table displays the document date, source, title, type, and size (a proxy to assist you in estimating the amount of content in the document and the time it might take to display).

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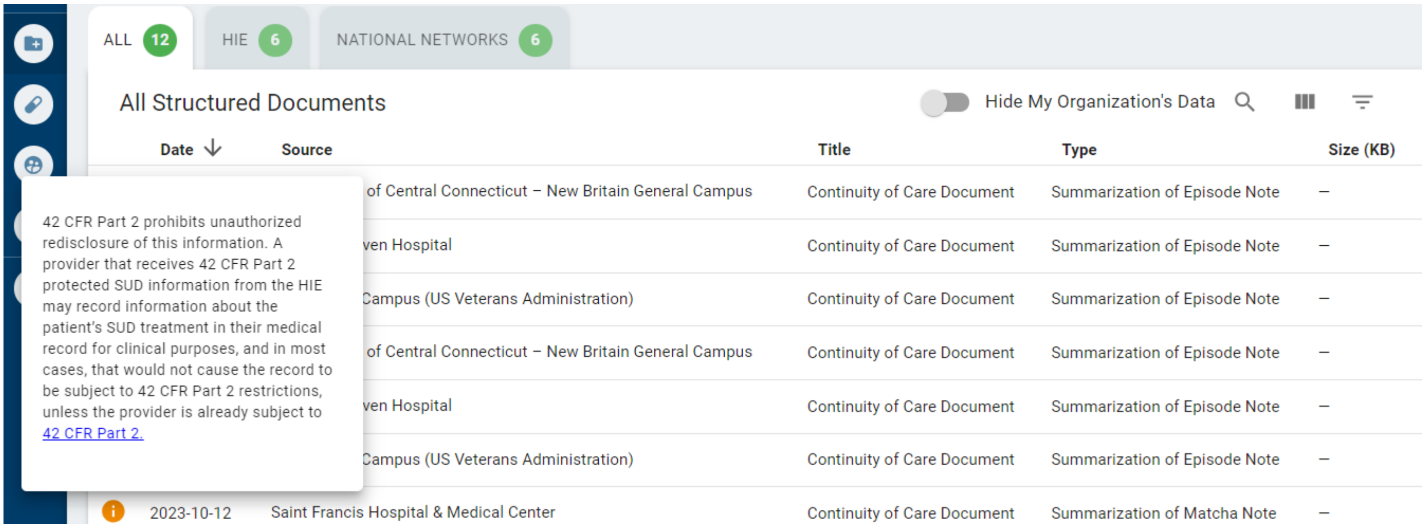
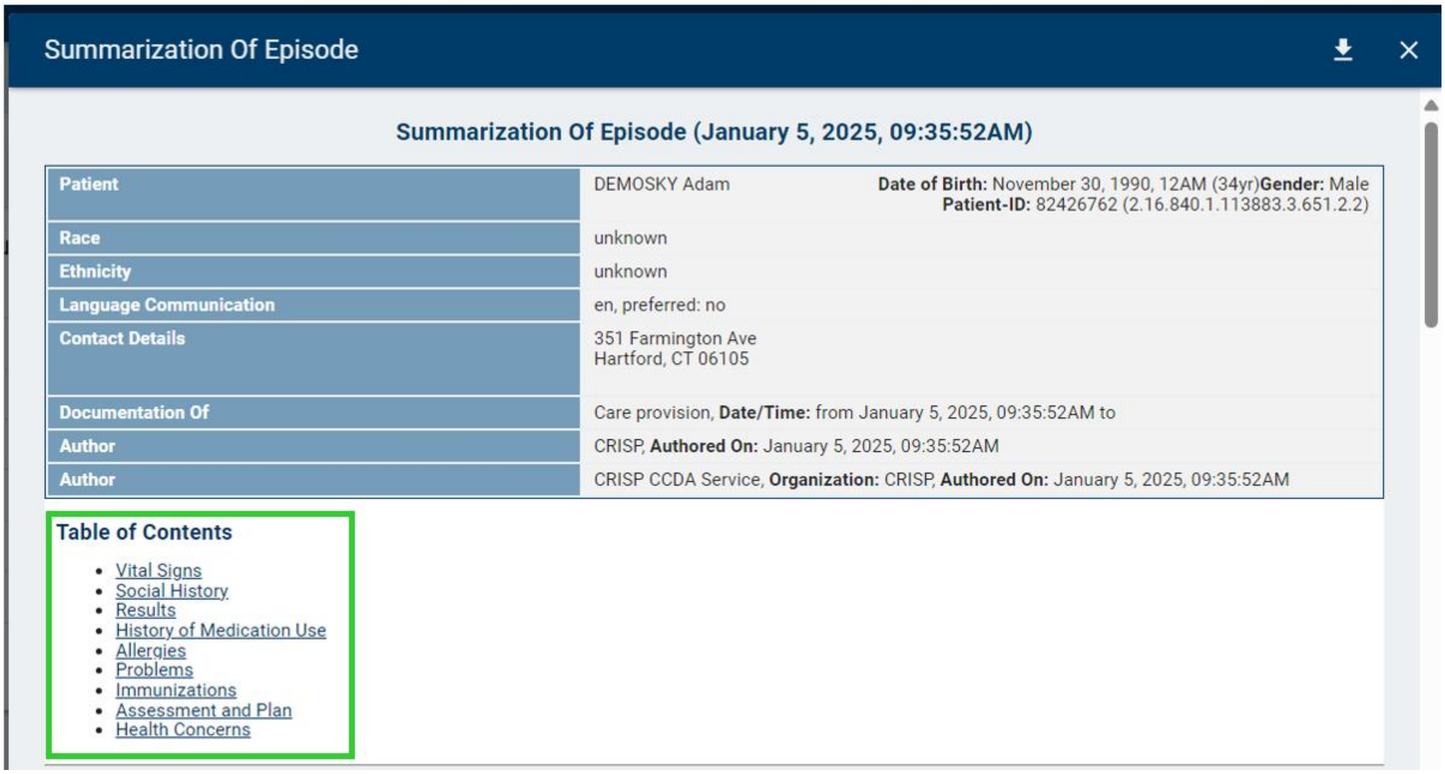
[1] A CCD is a generic name for an electronically generated document that summarizes either an episode of care for a patient or contains a longitudinal summary of care for that patient.

Patients who have consented to sharing clinical information related to substance use disorder (SUD) treatment with their care team will have this icon: Hovering over the icon will reveal disclaimer language, specifying that the information contained in the structured document subject to 42 CFR Part 2 rules and prohibits disclosure of this structured document.



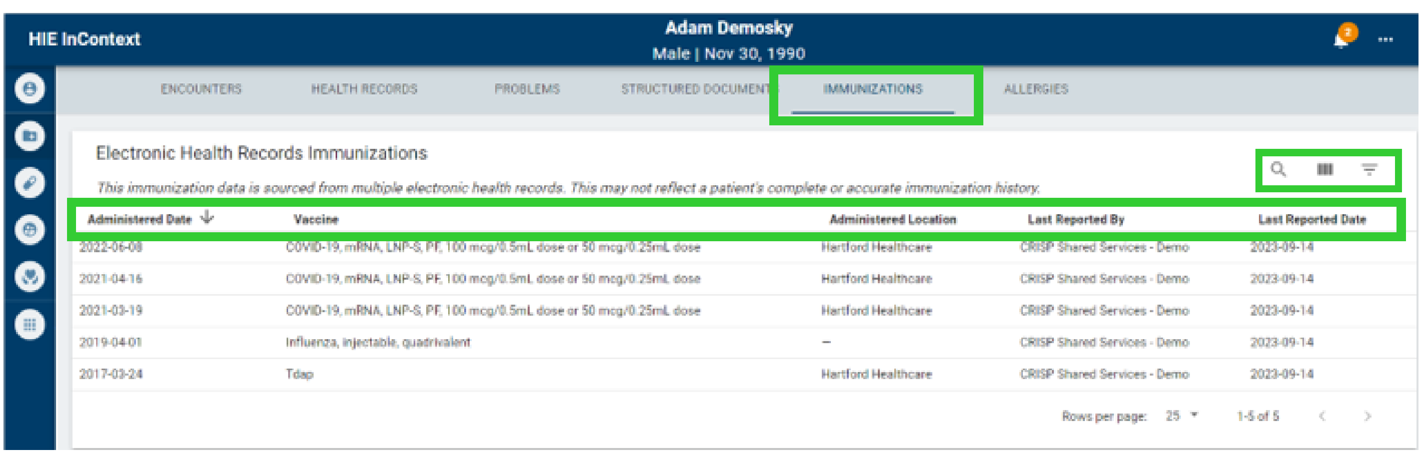

Clicking on any row will open a dialog box with the selected document. Larger documents may take longer to display on screen. Please note that most of the documents will be long and you may have to scroll to see all the data. You can download the PDF to be able to use the document in your own system or to give to your patient.

Continuity of Care Documents (CCDs) displayed in the Structured Documents subtab include a Table of Contents to support navigation to important sections of the CCD. Click on a section header in the table of contents to jump to that section of the document.



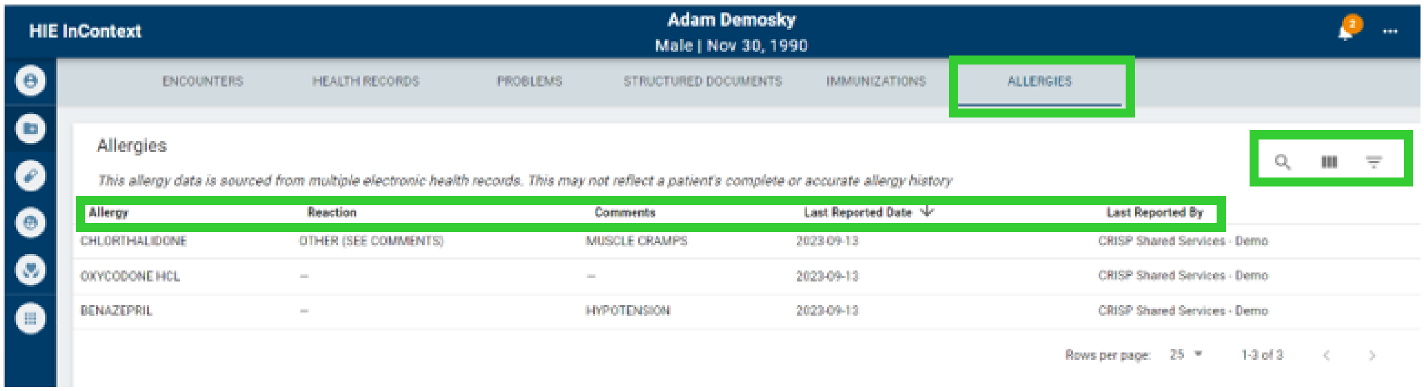

## Immunizations Tab

When an immunization has been recorded, information listed will include the date the immunization was administered, the name of the vaccine administered, the healthcare organization that administered the immunization and the last reported date of the immunization. Where possible, immunizations have been deduplicated. However, duplicate immunizations may display in cases where two different dates are indicated for the same vaccine (i.e. the location it was originally administered versus the location where a patient mentions it was administered). This information is intended to supplement information accessed through the Department of Public Health's immunization registry, CTWiz.



## Allergies Tab

When an allergy has been recorded, information listed will include the name of the allergy, the reported reaction, reported comments, the last reported date of the allergy and the healthcare organization that last reported the allergy. You will be able to filter information using the filter icon, adjust the columns by using the view columns icon, and search for information by selecting the search icon and entering in full or partial allergy names.

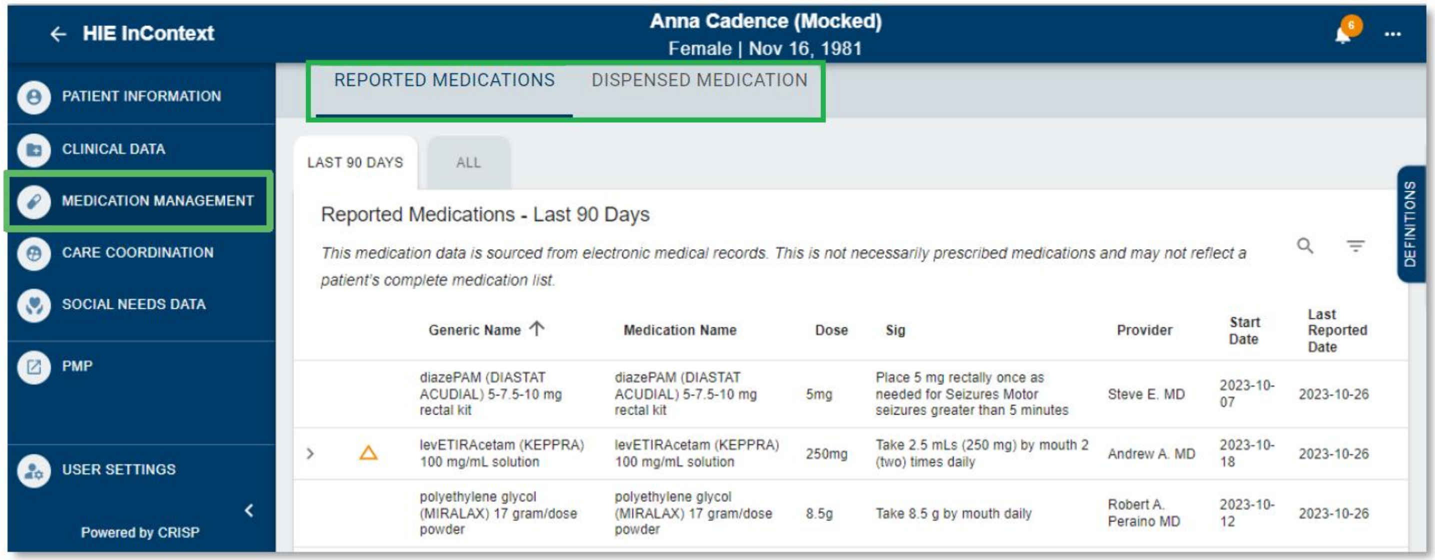


## Medication Management Section

The Medication Management section is a compilation of medication data from various sources including Continuity of Care Documents (CCDs) and pharmacy data contributed to Connie to facilitate medication reconciliation and deprescribing, support collaborative care, reduce medication costs and errors, and improve clinical outcomes. The medication management section may not reflect a patient's complete medication history.

Medication management can augment the data within a provider's electronic health record (EMR) to facilitate a medication reconciliation process that typically takes place within their EMR and utilizing EMR tools for drug-drug / drug-allergy interactions.

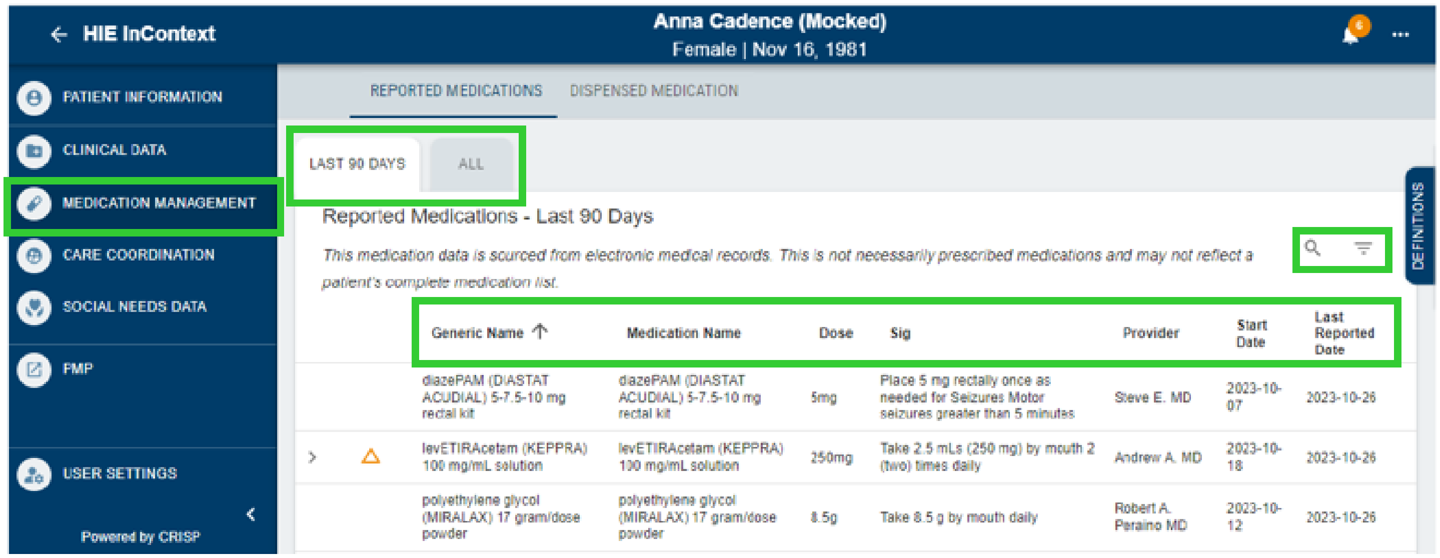
This section uses a deduplication algorithm to streamline viewing for an easily digestible overview of a patient's most recent medications, while enabling the provider access to the underlying data if needed.



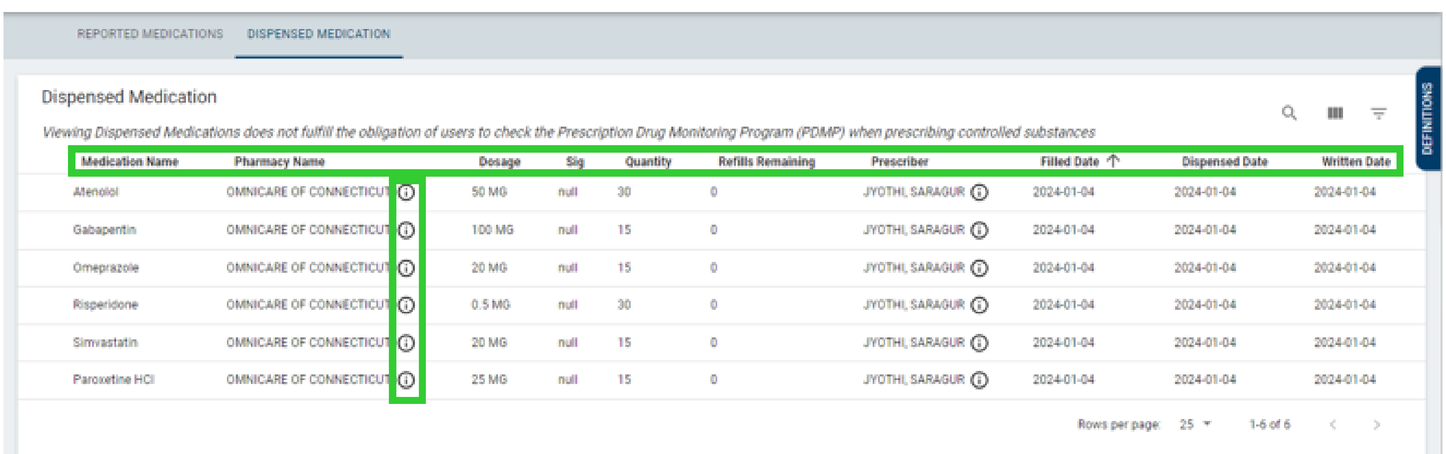
## Display

When displayed in full view, ‘Medication Management’ will provide two tabs — Reported Medications and Dispensed Medications. Reported Medications includes two sub-tabs — 'Last 90 Days' and ‘All’— with ‘Last 90 Days’ as the default view.  Both sub-tab views display the medications table with the following columns: generic name, medication name, dose, sig, provider, start date, and last reported date.

Data on the table is arranged alphabetically by generic name. ‘Start date’ represents the prescription start date as of the latest CCD received by Connie. The ‘reported’ date refers to the date of the latest CCD that the medication was shown on.



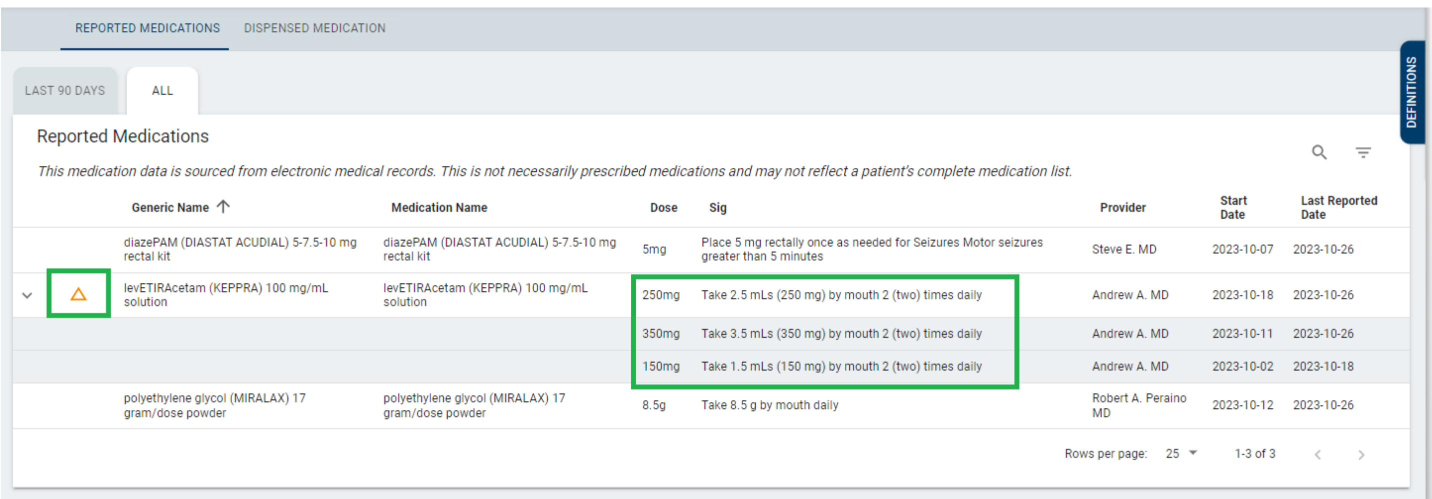

Dispensed Medications display data sourced from pharmacies. The tab displays the medication table with the following columns: Medication Name, Pharmacy Name, Dosage, Sig, Quantity, Refills Remaining, Prescriber, Filled Date, Dispensed Date, and Written Date. The Fill Date represents the date the pharmacy filled the order, whereas the Dispensed Date represents the date the patient picked up the medication. The ⓘ icon provides contact information for the pharmacy or prescriber when available.



## Data Display Algorithm

Data displayed on the table is listed so that:

1. A single data row represents that the generic name was found from a single source.
2. For data source from CCDs:
   - A data row with an expand/collapse button represents that the generic name was found on more than one CCD but there were no changes in the dose or prescriber data.
   - A data row with an expand/collapse button and the 'Change in Meds History' flag represents that the generic name was on more than one CCD with either a change in dose or prescriber information.
3. For data source from Pharmacies:
   - A data row with an expand/collapse button represents that the generic name was found from more than one pharmacy. There may or may not be changes in dose and/or prescriber.

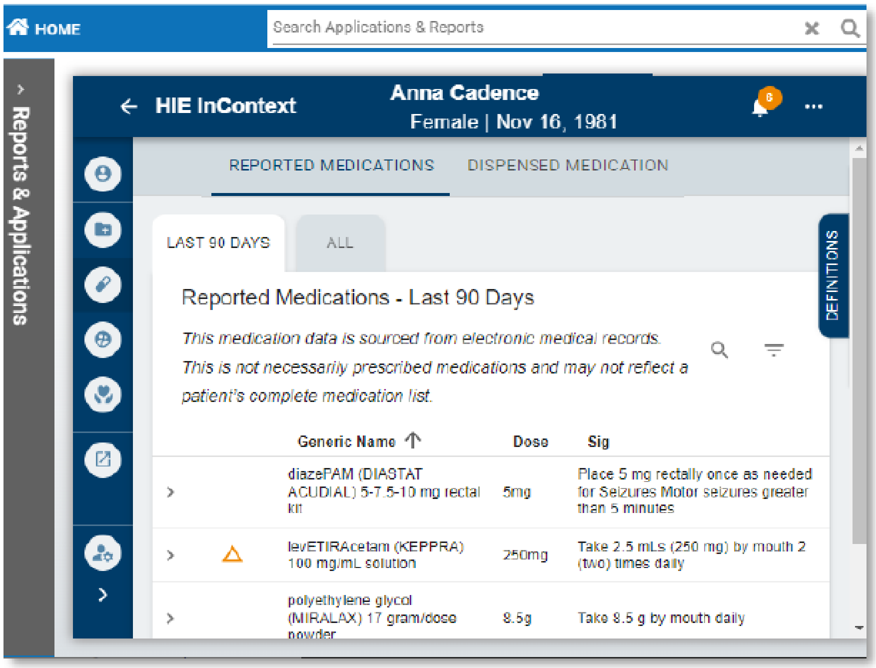



| | | Generic Name | Medication Name | Dose | Sig | Provider | Start Date | Last Reported Date |
|---|---|---|---|---|---|---|---|---|
| | | diazePAM (DIASTAT ACUDIAL) 5-7.5-10 mg rectal kit | diazePAM (DIASTAT ACUDIAL) 5-7.5-10 mg rectal kit | 5mg | Place 5 mg rectally once as needed for Seizures Motor seizures greater than 5 minutes | Steve E. MD | 2023-10-07 | 2023-10-26 |
| | | levETIRAcetam (KEPPRA) 100 mg/mL solution | levETIRAcetam (KEPPRA) 100 mg/mL solution | 250mg | Take 2.5 mLs (250 mg) by mouth 2 (two) times daily | Andrew A. MD | 2023-10-18 | 2023-10-26 |
| | | | | 350mg | Take 3.5 mLs (350 mg) by mouth 2 (two) times daily | Andrew A. MD | 2023-10-11 | 2023-10-26 |
| | | | | 150mg | Take 1.5 mLs (150 mg) by mouth 2 (two) times daily | Andrew A. MD | 2023-10-02 | 2023-10-18 |
| | | polyethylene glycol (MIRALAX) 17 gram/dose powder | polyethylene glycol (MIRALAX) 17 gram/dose powder | 8.5g | Take 8.5 g by mouth daily | Robert A. Peraino MD | 2023-10-12 | 2023-10-26 |

Rows per page: 25 1-3 of 3

## Mobile View

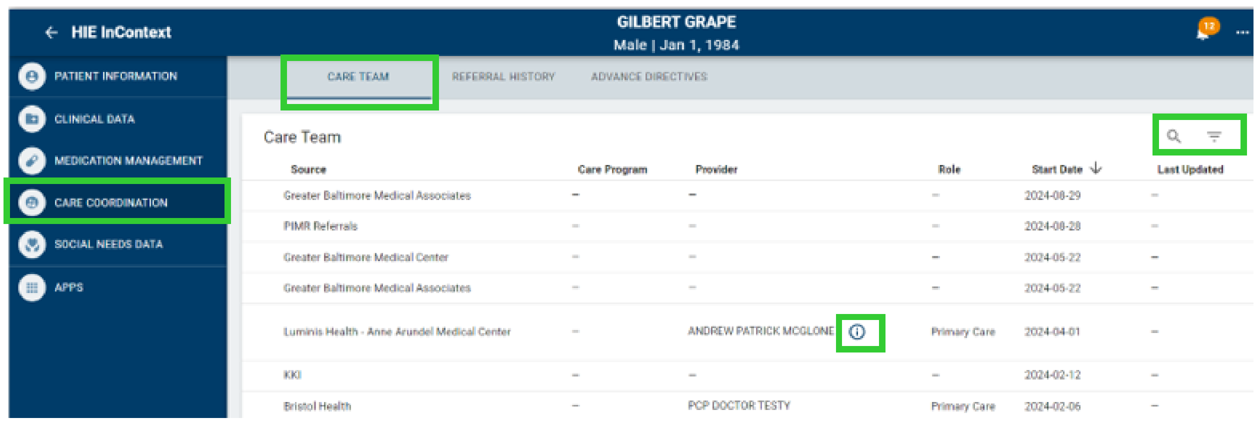
In mobile view, the table collapses such that both table tabs will always display generic name, dose, and sig. You can find the other columns - medication name, prescriber, start date, and report date - by expanding each data row on the table. In mobile view, the expand/collapse button and the 'Change in Meds History' flag will only display the most recent data; and the 'Change in Meds History' flag will still be displayed if applicable to that data row.



## Care Coordination Section

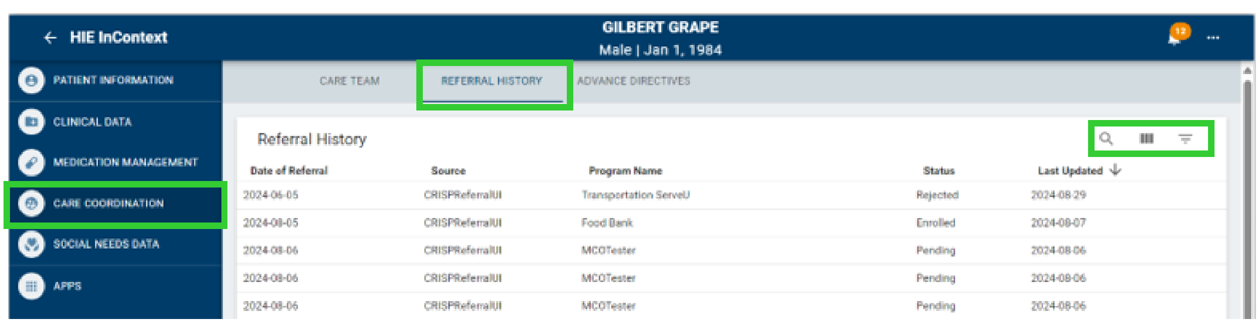
### Care Team Tab

The ‘Care Coordination’ section displays three tabs: Care Team, Referral History, and Advance Directives. Care Team lists the organizations and providers that have a relationship with your patient. This can include your patient’s care program and care manager and identifies the ‘start date’ and ‘last updated’ dates for a Care Team relationship. Care Team data is populated from ADTs and patient panels submitted to Connie. Hover over the blue information icon to get contact information for providers and care managers. When the Care Team is identified as a 42 CFR Part 2 (substance use disorder treatment) facility, a will appear at the beginning of the Care Team row. Clicking on the icon will show a disclaimer specifying that the information contained is subject to 42 CFR Part 2 rules. You will be able to filter information using the filter icon and search for information by selecting the search icon and entering in full or partial information.




### Referral History Tab

Referral History includes a list of referrals providers have made for the patient through Connie. Each entry includes the referral date, source of the referral, what service (program) the patient was referred to, and whether the referral status is pending or complete.




The Referral History tab will display referral history by the last updated date, so referrals can be viewed by the most recent updates first. To see referral details select a referral entry. Details include the referral sender, recipient, and journal entries. Journal entries show the status history of the referral, notes indicating any information that’s needed, and the name of the person who made the note and status update.

GILBERT GRAPE | Male | Jan 1, 1984

## Referral History

Transportation ServeU

Date Updated: 2024-09-03

### Referral Sender

***Referring Provider:*** Kelsey Parrish

***Referring Provider Organization:*** Connie Internal

***Referring Provider Phone:*** 555-555-5555

***Referring Person:*** Not Provided

***Referring Person Organization:*** Not Provided

***Referring Person Email:*** Not Provided

### Referral Recipient

***Organization:*** Senior Center of Connecticut

***Program:*** Transportation ServeU

***Program Description:*** Supports DHHS and CTHCP program referrals for individuals 65 and older with Medicare or Medicaid and a medical condition. If a client has not yet had a Universal Assessment, we will work with the Access Agency to complete this. This will result in a delay of services for the clients. This program provides rides for clients to and from medical appointments, grocery shopping and medical treatments such as dialysis

***Referral Coordinator:*** Not Provided

***Referral Coordinator Phone:*** 555-555-1234

***Referral Coordinator Email:*** Not Provided

### Journal Entries

| Date | Status | Note | Person |
|---|---|---|---|
| 2024-09-03 | Accepted | none | Nick Ramsing |
| 2024-09-03 | Accepted | Referral Accepted | Nick Ramsing |
| 2024-09-03 | Pending | journal entry | Nick Ramsing |
| 2024-07-31 | Pending | Status was reset to Pending | Janelle Thomas |
| 2024-07-25 | Accepted | Referral Accepted | Kelsey Parrish |
| 2024-07-25 | Pending | Medicaid Id Number is required. Please call with information | Kelsey Parrish |
| 2024-07-25 | Pending | Referral Created | System |

Rows per page: 10 1-7 of 7

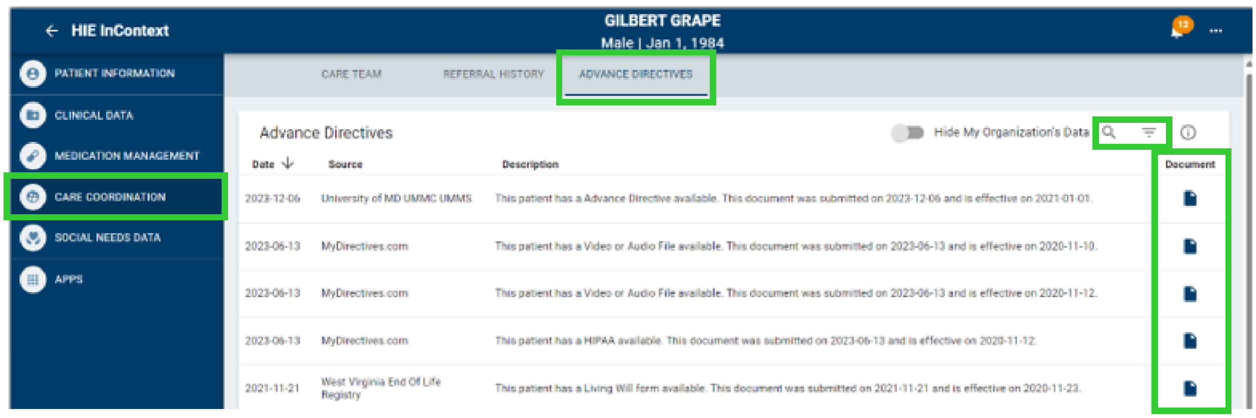
## Advance Directives Tab

Users can access Advance Directives under the Care Coordination section within the Clinical Information app in the portal, or the InContext app.

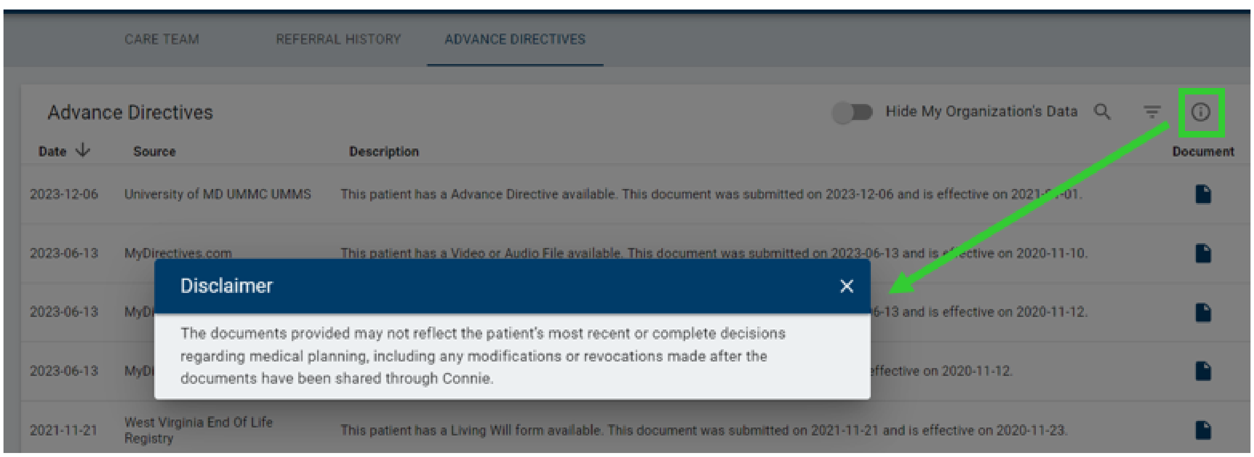
To access the Advance Directives tab, do the following:

1. Select “Clinical Information”
2. Select the “Care Coordination” menu option
3. Select “Advance Directives”

By clicking the page icon, you can view the full document as a PDF.



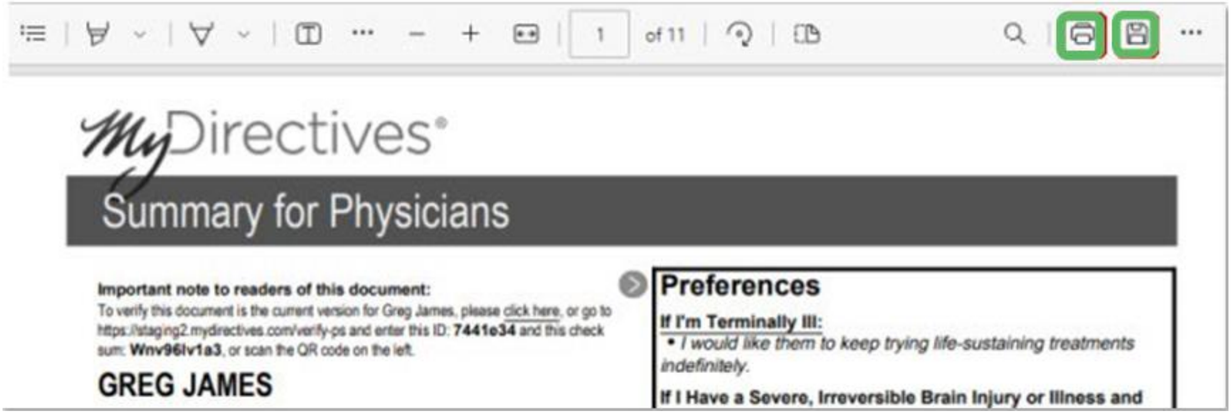

Hovering over the disclaimer ⓘ icon opens a pop-up box stating the documents provided may not reflect the patient’s most recent or complete decisions regarding medical planning, including any modifications or revocations made after the documents have been shared through Connie.




This tab displays advance healthcare documents (AHCDs) created in or uploaded to MyDirectives.com by either Connecticut residents or providers using ADVault. When an AHCDs are available, the listed information will include the date the form was submitted, the form’s source, and a document description. This description contains the document type and effective due date.

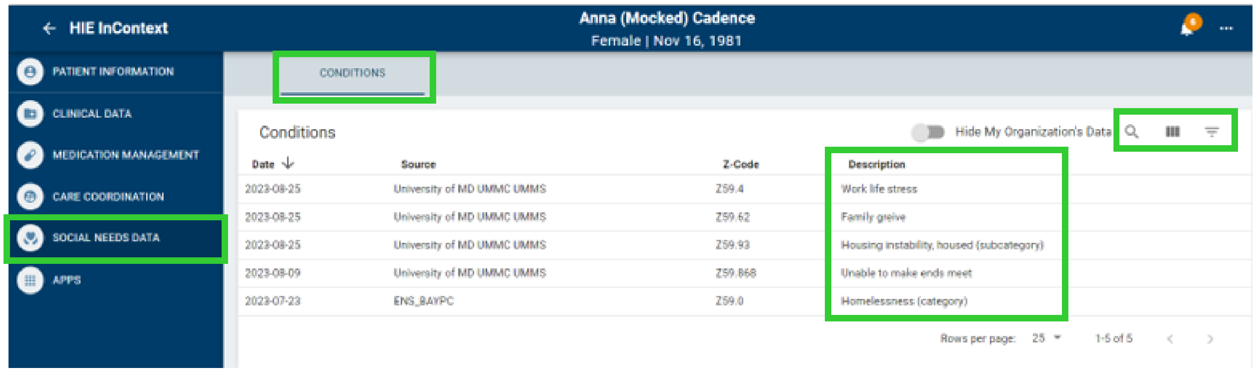
If an AHCD is available, you'll see two documents, including the HIPAA Authorization form for the allowance of sharing the document and the AHCD itself.

To print or save the AHCD, users can select the print/save icons after viewing the document as a PDF.



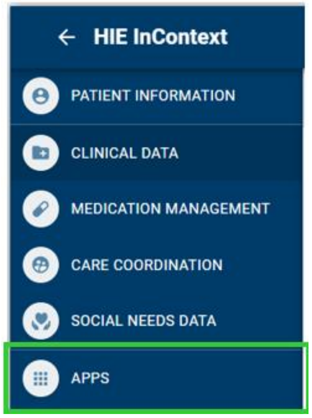

## Social Needs Data

A "Conditions" subtab under Social Needs Data section displays Social Determinants of Health information using ICD-10 z-Codes from ADTs. When used, these codes will highlight whether the patient has experienced problems related to education, literacy, employment, housing, psychosocial circumstances, and other social issues that have a known impact on health.



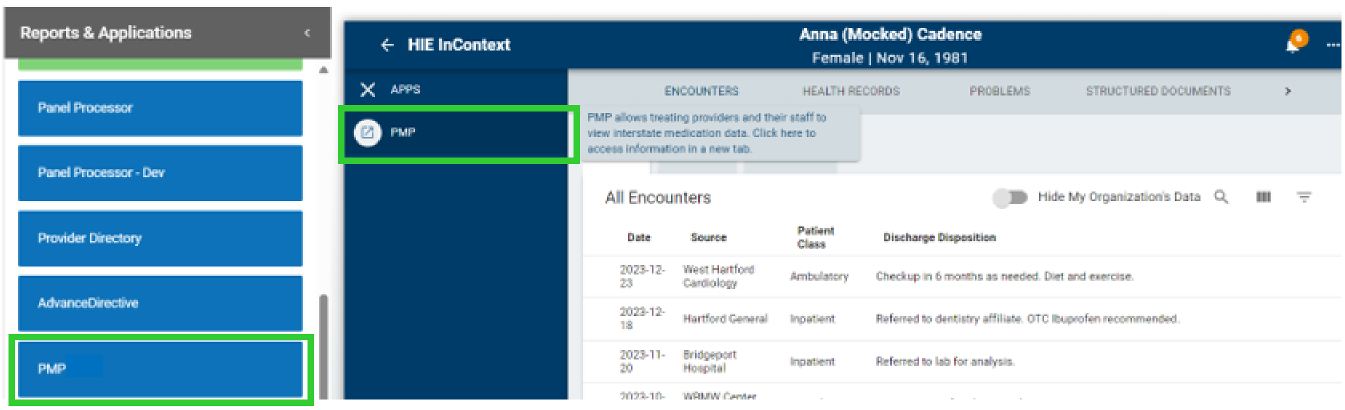
## Apps

Selecting Apps will populate subtabs with single sign-on applications (SSO) such as the PMP. Selecting this subtab will launch you into a new application.




### Prescription Monitoring Program (PMP)

The Prescription Monitoring Program (PMP) can be accessed by selecting Apps from the Clinical Information menu, or the Applications & Reports menu in the far-left navigation.




The PMP collects prescription data for Schedule II through Schedule V drugs into a centralized database, the Connecticut Prescription Monitoring and Reporting System (CPMRS), which can then be used by healthcare providers and pharmacists in the active treatment of their patients.

The purpose of the CPMRS is to present a complete picture of a patient's controlled substance use, including prescriptions by other providers. The CPMRS is used to improve quality of patient care and to reduce prescription misuse, addiction, and overdose. Integrating the PMP into the Connie portal allows authorized users to access the CPMRS NARX Report directly within the Connie portal.

Registration with CPMRS is required prior to accessing PMP through Connie.  Per state statute, all prescribers in possession of a Connecticut Controlled Substance Registration issued by the State of Connecticut, Department of Consumer Protection, are required to register as a user with the Connecticut Prescription Monitoring and Reporting System (CPMRS) at https://connecticut.pmpaware.net.

Contact your organization's HIE Admin if you would like to have access to PMP through the Connie Portal.

# Features

## Summary

| Summary | | Narcotics* (excluding Buprenorphine) | | Sedatives* | | Buprenorphine* | |
|---|---|---|---|---|---|---|---|
| Total Prescriptions: | 0 | Current Qty: | 0 | Current Qty: | 0 | Current Qty: | 0 |
| Total Prescribers: | 0 | Current MME/day: | 0.00 | Current LME/day: | 0.00 | Current mg/day: | 0.00 |
| Total Pharmacies: | 0 | 30 Day Avg MME/day: | 0.00 | 30 Day Avg LME/day: | 0.00 | 30 Day Avg mg/day: | 0.00 |

## Rx Data

**PRESCRIPTIONS**

Total Prescriptions: 0
Total Private Pay: 0

| Fill Date | ID | Written | Drug | Qty | Days | Prescriber | Rx # | Pharmacy | Refill | Daily Dose * | Pymt Type | PMP |
|---|---|---|---|---|---|---|---|---|---|---|---|---|

*Per CDC guidance, the MME conversion factors prescribed or provided as part of the medication-assisted treatment for opioid use disorder should not be used to benchmark against dosage thresholds meant for opioids prescribed for pain. Buprenorphine products have no agreed upon morphine equivalency, and as partial opioid agonists, are not expected to be associated with overdose risk in the same dose-dependent manner as doses for full agonist opioids. MME = morphine milligram equivalents. LME = Lorazepam milligram equivalents. mg = dose in milligrams.

**Providers**

Total Providers: 0

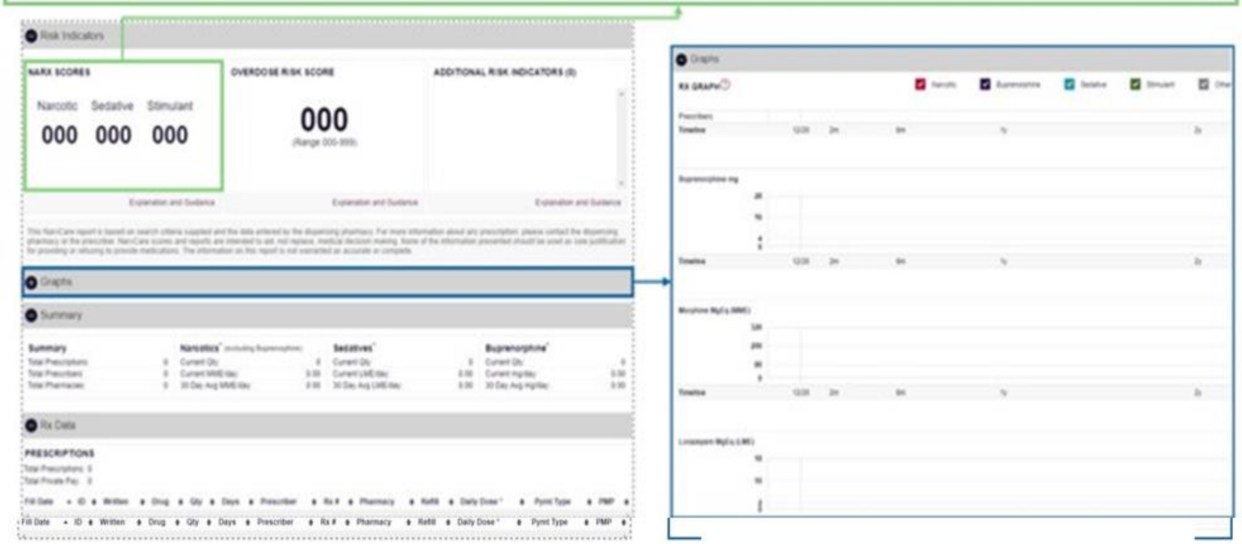
| Name | Address | City | State | Zipcode | Phone |
|---|---|---|---|---|---|

**Pharmacies**

Total Pharmacies: 0

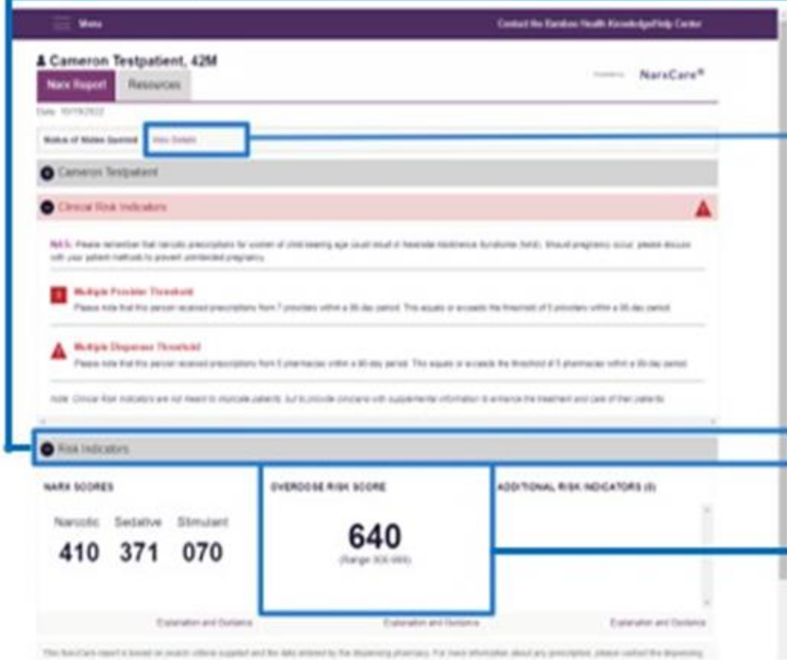
| Name | Address | City | State | Zipcode | Phone |
|---|---|---|---|---|---|

**Narx Scores are not abuse scores.** It is true that at very high scores patients are likely to exhibit some form of misuse in their PMP record, but a score alone cannot be used to determine appropriateness or misuse.
**The Narcotic and Sedative score overlap** in that narcotics contributes to the sedative score and vice versa. As a result, a patient may have a low narcotic score even though they haven't been prescribed a narcotic.
**Overlapping prescriptions** are heavily weighted in the scoring algorithm. The key requirement is that two different prescribers prescribe the same type of medication for use on the same day.
**Narx Scores and the NarxCare report are intended to aid, not replace medical decision-making.** The information presented in the report should not be used as the sole justification or refusing to provide medications.
**The PMP AWARxE Help Desk is unable** to advise on prescription decision making.



**Risk Indicators**
Risk Indicators identifiers within PMP data have shown to be predictors of adverse outcomes, specifically unintentional overdose death. This section of the report is also the location where non-PMP data will be displayed if available. There are currently three PMP based "red flags".
Each flag, if available, will be listed as:

- More than 4 pharmacies in any 90-day period
- More than 5 providers in any year (365 days)
- More than 40 morphine milligram equivalents per day (40 MME) average and more than 100 MME total at any time in the previous 2 years



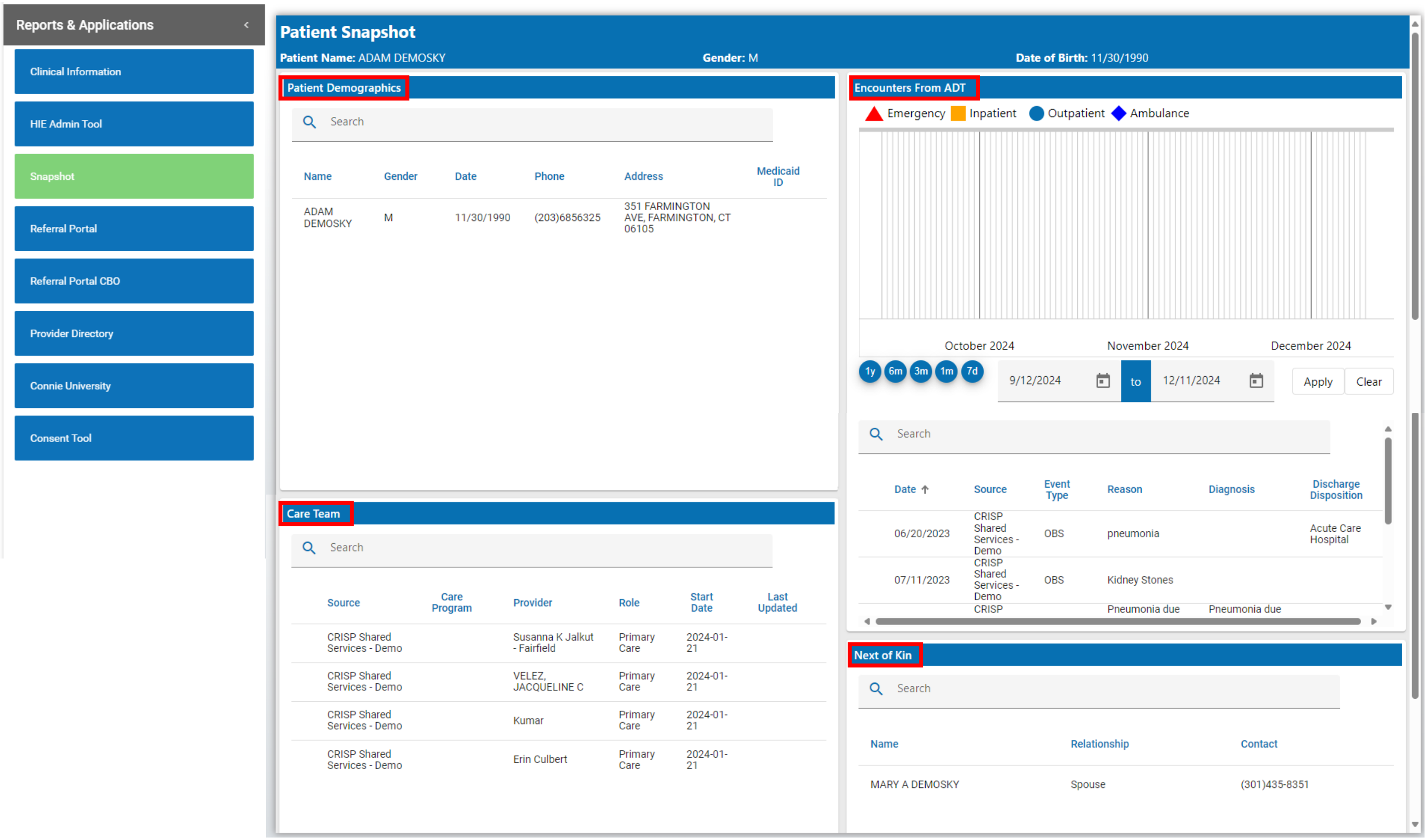


The Overdose Risk Score is a predictive score for unintentional overdose death. It often correlates with the Narx Scores, but not always. When differences exist, it is often because Overdose Risk Scores increase when patients go from a period of high usage to a period of lower usage, whereas Narx Scores typically decrease in this same situation.
The ORS is intended to eventually provide a holistic estimate of overdose risk.
Currently, the risk assessment does not incorporate any data other than PMP usage.

## Snapshot App

Snapshot includes four quick-view features:

- **Patient Demographics**: Patient name, gender, DOB, phone number, address, and (if applicable) Medicaid ID.
- **Encounters from ADT:** The patient's emergency, inpatient, outpatient, and/or ambulance encounters displayed as a histogram by encounter type across a flexible date range.
- **Next of Kin:** Provides a list of closest living relatives to the patient on file from different sources.
- **Care Team:** List of practices providing care, associated primary care provider, and (if available) a care manager or a care program within which they are enrolled.




Hover over an encounter for more information or change the encounter timeframe display using the quick pick range or a custom range.

## Consent Tool App

The consent tool includes forms that enable Connie users to provide written notices about their patients to Connie. In 2023, there will be two forms available:

- **Prevention of Harm – Block Patient Access Form.** The Prevention of Harm Form enables providers to submit written notice to Connie that the patient's electronic health information (EHI) should not be shared with that patient or his/her/their authorized representative because access or disclosure of EHI is reasonably likely to cause substantial harm to or endanger the life or physical safety of (a) the patient; and/or (b) another person.
- **SUD Part II Provider – Patient Consent Form.** The SUD Consent Form enables substance use disorder (SUD) providers who have executed a qualified service agreement (QSOA) to share data protected by 42 CFR Part 2 through Connie upon patient consent. This tool aims to improve care coordination between SUD providers and other health care providers, strengthen continuity of care for patients throughout SUD treatment levels, and ease workflow burden when obtaining consent and disclosing information.

### Consent Types

When there are multiple forms available, the Consent Tool App defaults to the Consent Types section of the tool. This section lists the forms available. Currently, only the Prevention of Harm - Block Patient Access form is available for Connie Users and launching the Consent Tool App will open the Prevention of Harm form directly.

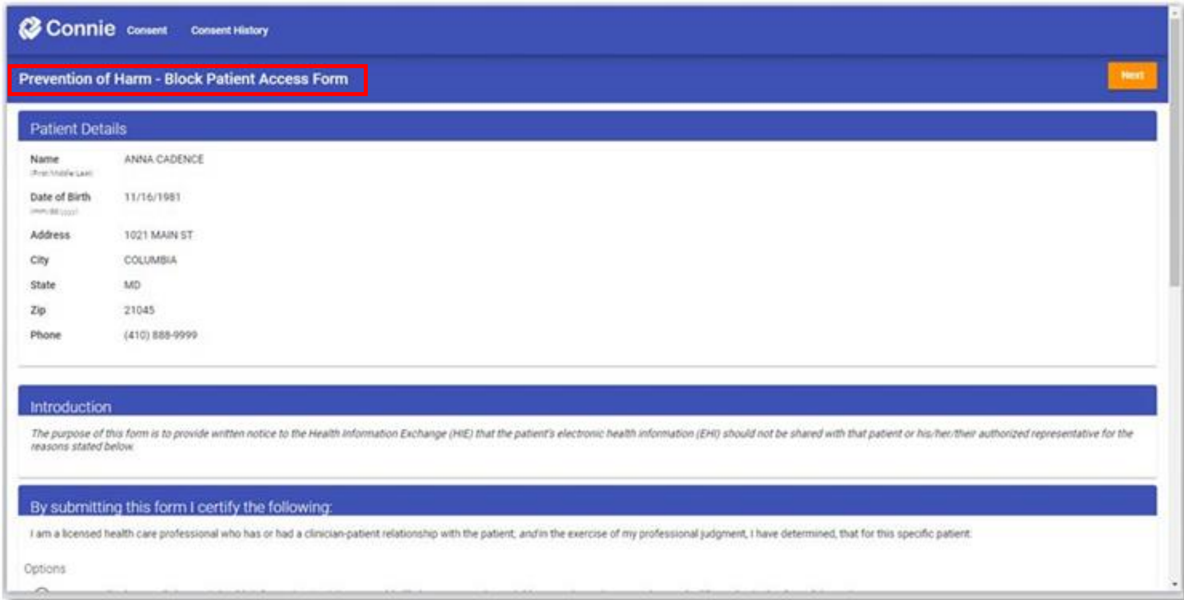
## Prevention of Harm – Block Patient Access Form

The Prevention of Harm Form was developed in anticipation of Connie enabling patient access to their EHI available in Connie. Enabling patient access (a) aligns with federal and state information blocking and interoperability rules, and (b) supports Connie's efforts to attain the Patient Access goals of the State-wide Health Information Exchange as described in Connecticut State Statute Sec. 17b-59d.

Prevention of Harm is one of the few exemptions to the federal information blocking rule. If you have questions about when to apply the Prevention of Harm exemption for your patients, please contact your legal representative.

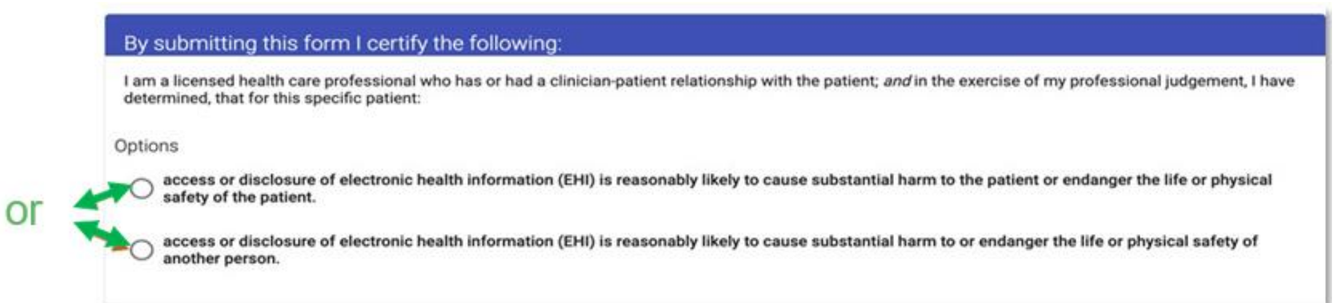
## Submitting the Form

The patient demographic data will pre-populate the fields at the beginning of the form.



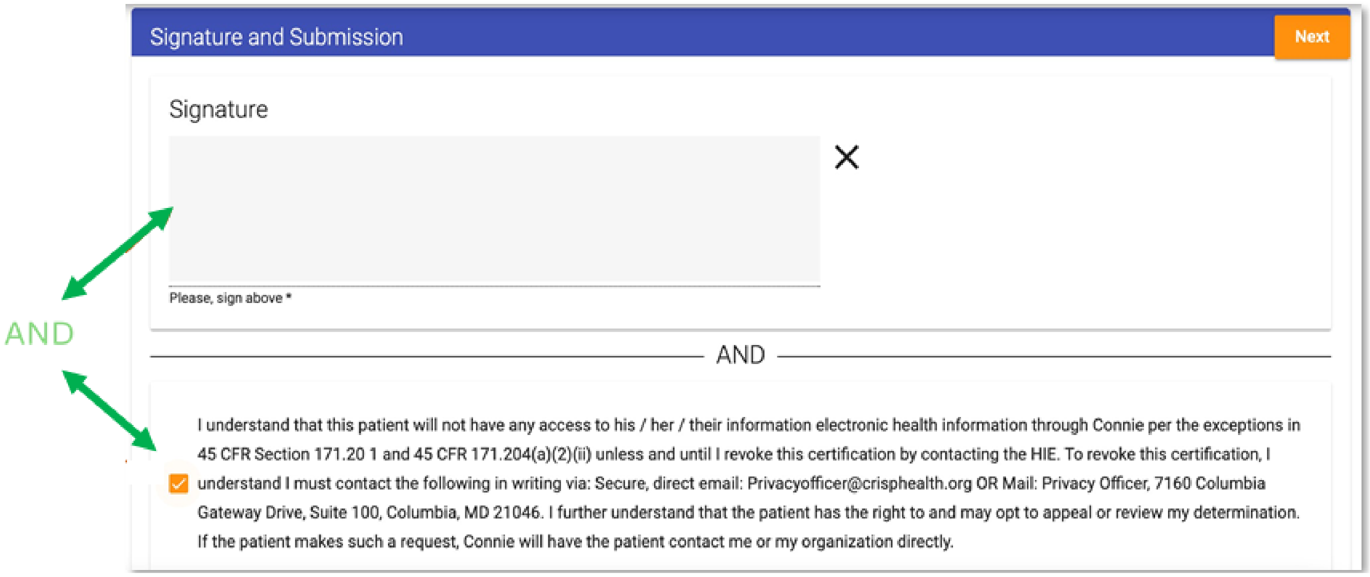

## Step 1: Certify the nature of the harm being prevented

The form requires you to certify that you are a licensed health care professional with a treatment relationship with the patient. Further, in exercising your professional judgement, that you feel that disclosing EHI with that patient — or their authorized representative — is reasonably likely to cause substantial harm to or endanger the life or physical safety of (a) the patient; or (b) another person. You will be required to select either harm to the patient or harm to another person using the radio button next to the appropriate option.



### Step 2: Sign the form

You can sign the form using your mouse, mouse pad, or touch screen to draw in your signature.




### Step 3: Attest to blocking the patient’s access to their EHI.

To submit the form, you must check the box next to the text under the signature box that confirms your understanding that submitting this form means that the patient named on the form will not have access to their EHI through Connie unless you revoke the certification.

### Step 4: Add your name and license number


Type your name and provider license number on the one line provided, separated by a space, and select “submit” to complete the process. This information is required for the Privacy and Security Officer to reverse the flag when provided written notification subsequently.

## What Happens Next

Once the form is submitted, the patient's record will be flagged. The Prevention of Harm flag blocks the patient from seeing any of their EHI directly from Connie while continuing to allow their providers to view the data within Connie's portal. If a patient with a Prevention of Harm flag on their record tries to access the Connie data through the 3rd party apps connected to Connie's Patient Access APIs, the patient will be notified that they are unable to access their data at this time. The patient will then be directed to contact their providers directly if they would like copies of their EHI. The patient will also have the option to contact Connie's Customer Support to provide support and answer questions about why they are unable to see their data and, if it is because of a prevention of harm block, how they can appeal the prevention of harm block with their provider.

## Revoking Prevention of Harm

To reverse this decision, contact the following in writing via:

**Email:** Privacyofficer@crisphealth.org (please remember to use encryption or Direct email to protect PII) OR

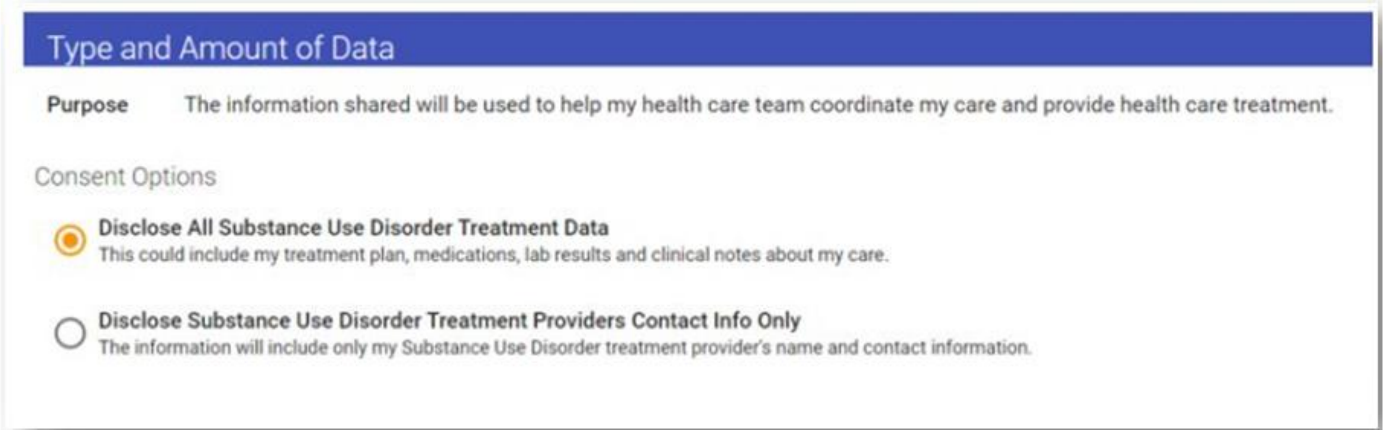
**Mail:** Privacy Officer, 7160 Columbia Gateway Drive, Suite 100, Columbia, MD 21046

## SUD Part II Provider – Patient Consent Form

Patients who agree to the consent form are agreeing that their Substance Use Disorder (SUD) treatment provider may share information about their SUD through Connie to the patient's Care Team who also participate with CRISP Shared Services and affiliate HIEs including Maryland, DC, West Virginia, Alaska and any future HIE affiliates.

Patients who consent to sharing SUD treatment via Connie are not able to specify which of their providers can/cannot access or view their SUD treatment information. These patients should be made aware that they aren't able to limit access to only specific providers.

These patients must select the amount and kind of information to disclose, which requires providers/staff to select one of two options shown below:



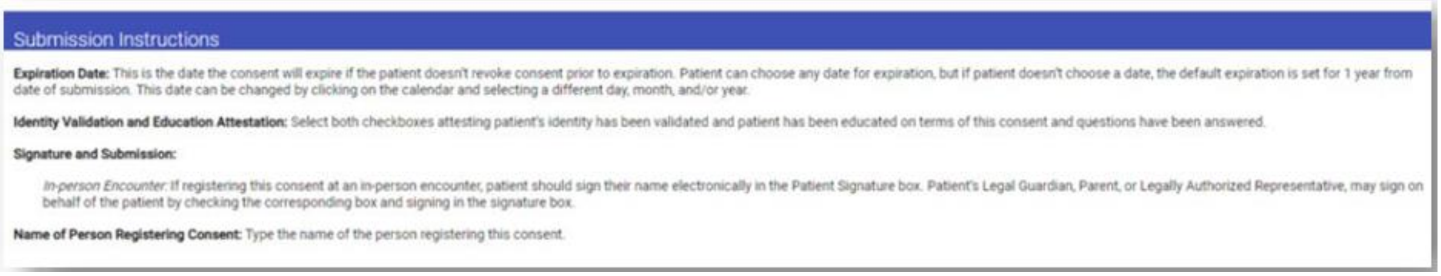
Type and Amount of Data

**Purpose** The information shared will be used to help my health care team coordinate my care and provide health care treatment.

Consent Options

- ◉ **Disclose All Substance Use Disorder Treatment Data**
  This could include my treatment plan, medications, lab results and clinical notes about my care.
- ○ **Disclose Substance Use Disorder Treatment Providers Contact Info Only**
  The information will include only my Substance Use Disorder treatment provider's name and contact information.

After selecting the desired option, please review instructions for each section carefully. If this is done via a telehealth visit, please be sure to have the Consent Form signed and completed by the patient before attesting in this tool.



Submission Instructions

**Expiration Date:** This is the date the consent will expire if the patient doesn't revoke consent prior to expiration. Patient can choose any date for expiration, but if patient doesn't choose a date, the default expiration is set for 1 year from date of submission. This date can be changed by clicking on the calendar and selecting a different day, month, and/or year.

**Identity Validation and Education Attestation:** Select both checkboxes attesting patient's identity has been validated and patient has been educated on terms of this consent and questions have been answered.

**Signature and Submission:**

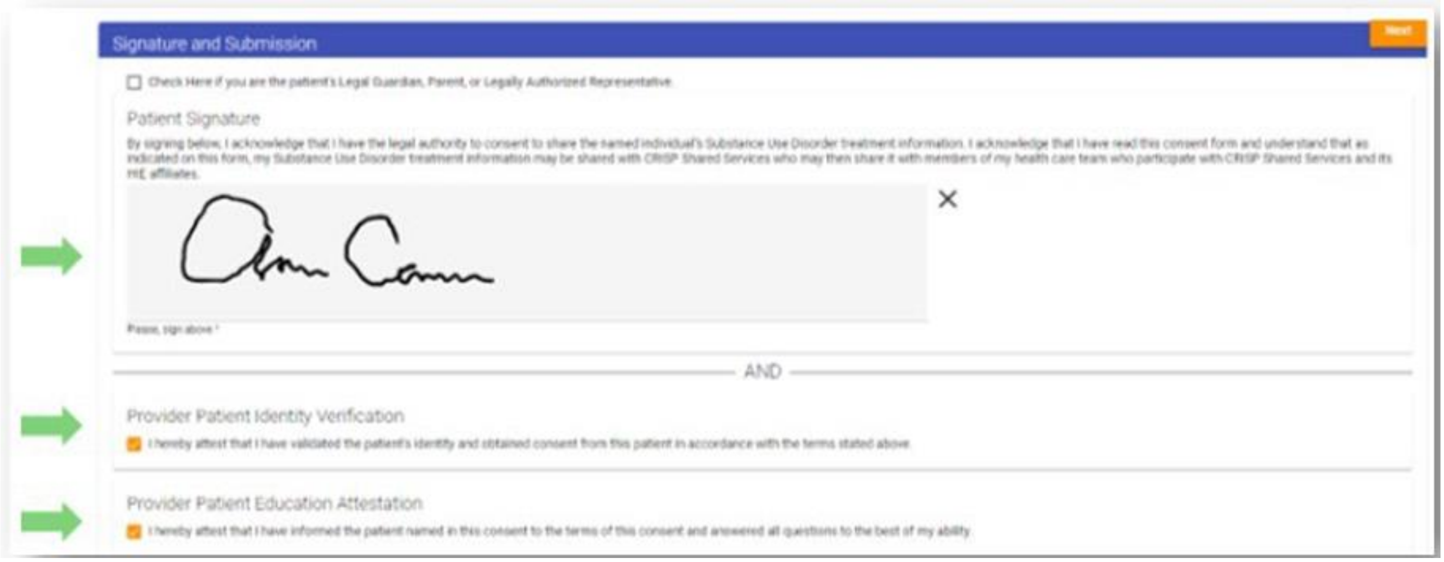
*In-person Encounter:* If registering this consent at an in-person encounter, patient should sign their name electronically in the Patient Signature box. Patient's Legal Guardian, Parent, or Legally Authorized Representative, may sign on behalf of the patient by checking the corresponding box and signing in the signature box.

**Name of Person Registering Consent:** Type the name of the person registering this consent.

It is important to note that the patient has the right to revoke consent at any time SUD Consent requires an expiration date, which a patient can select up to five years from the date the consent is registered.

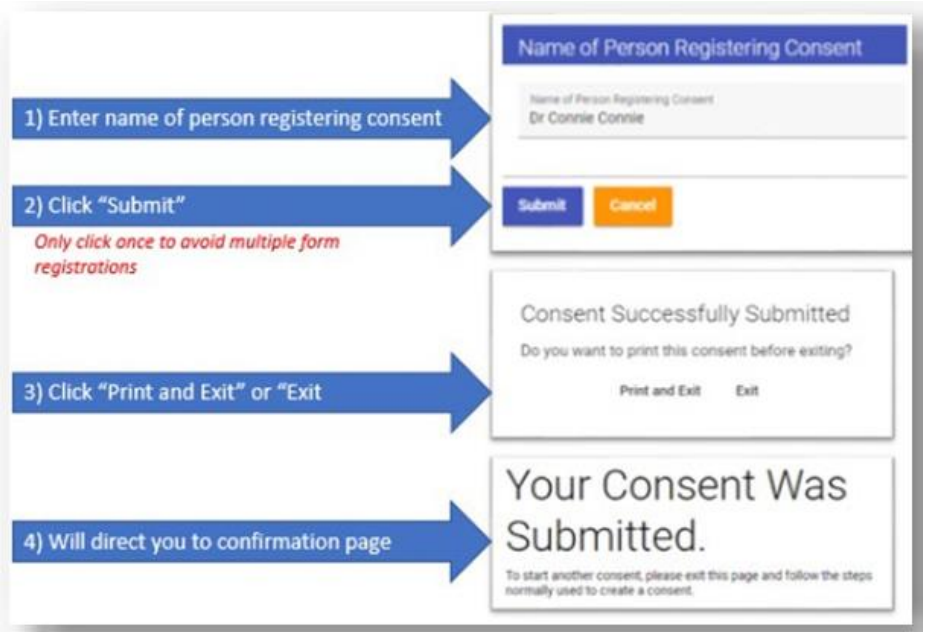
Additionally, providers/staff obtaining patient consent must attest that they have verified that patient's identity and the patient has been informed of all terms of the consent.

To sign the Consent Form, the patient will provide an electronic signature using a touchscreen or signature pad. The provider must then attest to the patient's identity signing the form, and that the patient has consented. The provider must also attest that the patient has provided consent knowing all the terms of consent.

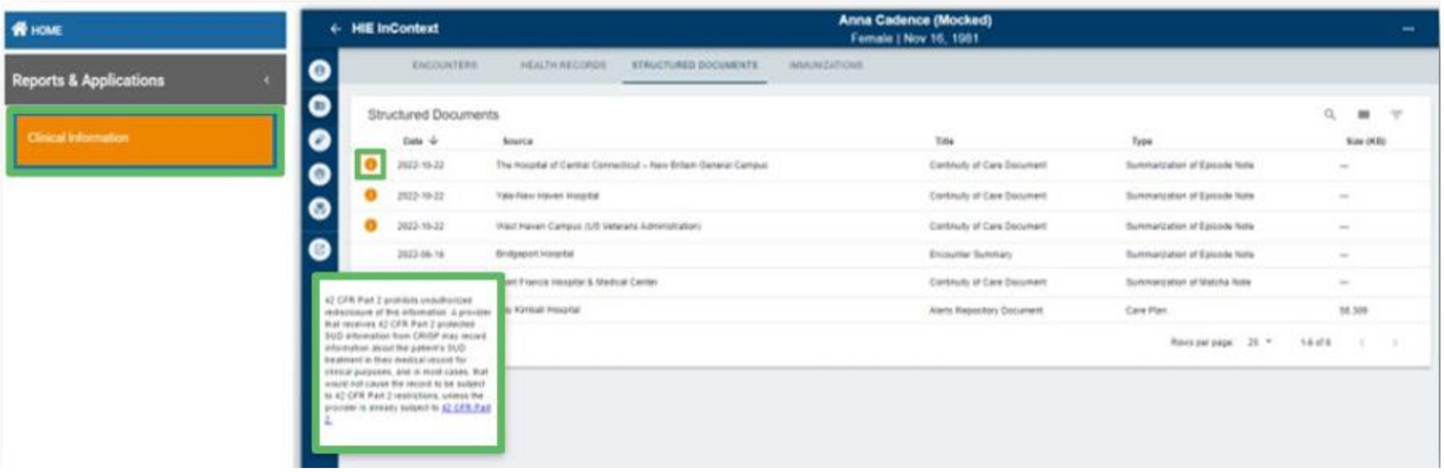



Legal guardians, parents, or legally authorized representatives may also provide a signature if applicable. This is done by selecting the "Click here if you are the patient's Legal Guardian, Parent, or Legally/Authorized Representative" – the person signing on behalf of a patient must enter their name into the form and sign electronically.

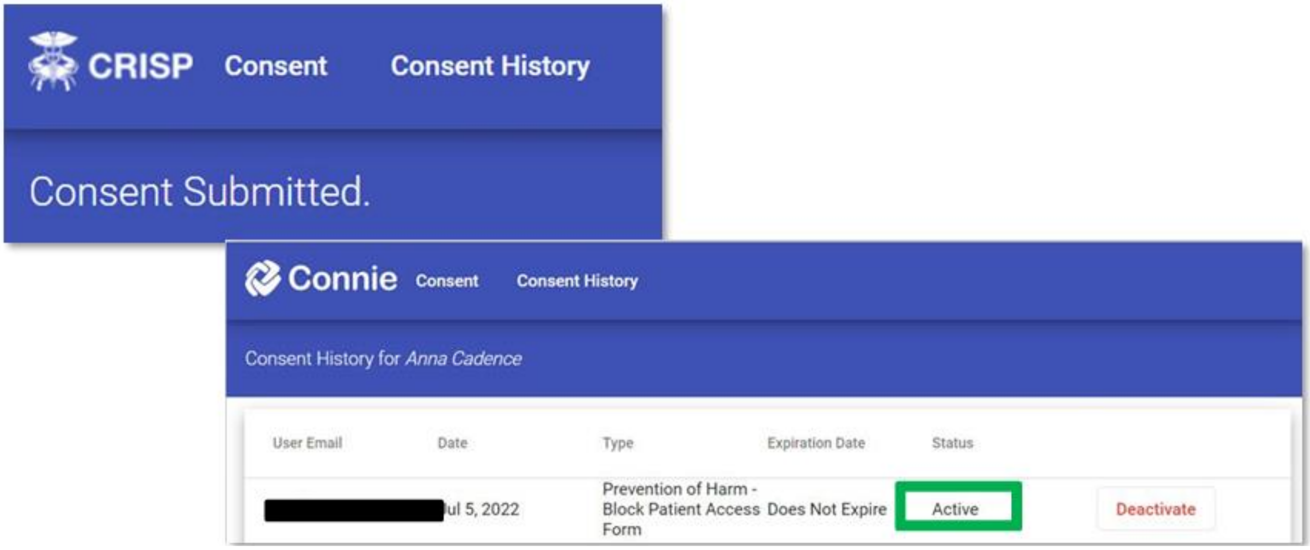
Follow these steps to provide submission and confirmation:



Once a patient has registered their consent, the SUD Part II data will be available to authorized providers in the Clinical Information app under “Clinical Data” tab and “Structured Documents” subtab. CCDs in this list will indicate with an information icon if the CCD provided is subject to 42 CFR Part 2 rules and can’t be disclosed.



## Consent History Tab

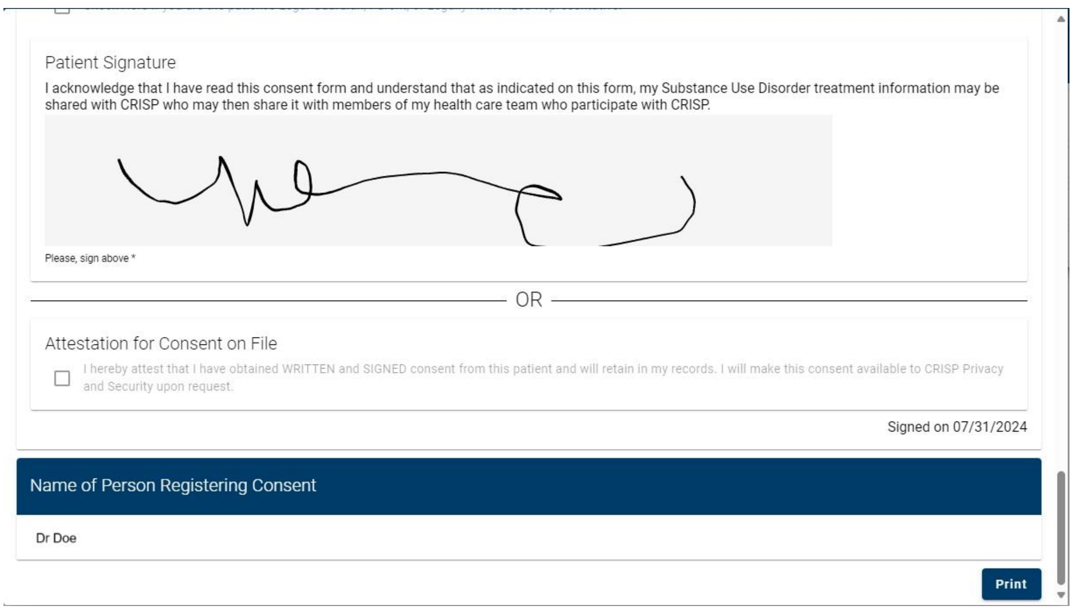


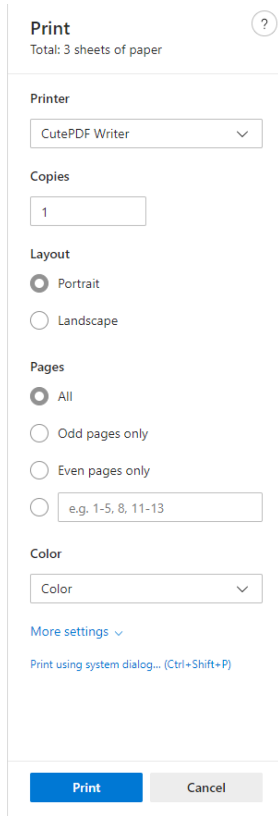

Upon patient request to revoke consent, providers can “deactivate” patient consents prior to any expiration date through the Consent History page. Deactivating a consent will change the status of the consent to inactive”.

***Note: Using the deactivation feature for the Prevention of Harm Tool will not lift the flag and enable a patient to access their records. Only contacting the CRISP Shared Services Privacy Officer in writing either by secure, direct email: Privacyofficer@crisphealth.org OR mailing Privacy Officer, 7160 Columbia Gateway Drive, Suite 100, Columbia, MD 21046 will lift the Prevention of Harm flag.***

### Printing Consent Form on File

Providers can review, print to PDF, or save the form as a file. From the Consent History tab, select the form on file you wish to print. Scroll to the bottom of the form and select the “Print” button. Use the dialogue box to specify how you would like to print and save the document.



# Appendix: Image Share

Imaging provides access to patient images in full diagnostic quality at point of care. Images and reports are available directly in the Connie portal and InContext app within minutes of the exam being performed, thus enhancing both speed and quality of care

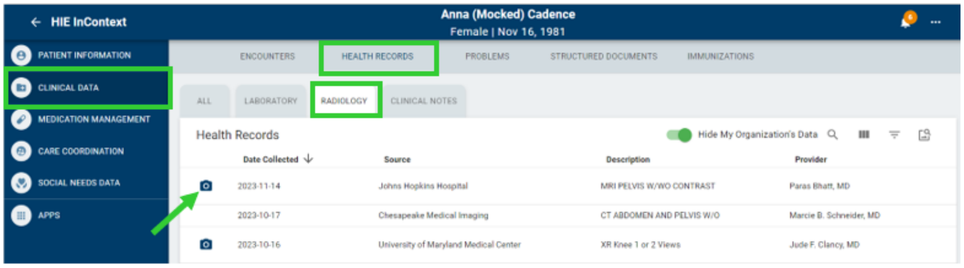
### Image Functionality

- **Report-Level:** View an image and the corresponding Radiology or Cardiology report.
- **Imaging Worklist**: Compare images from all organizations that contribute images to Connie. Images taken within the last 90 days are made available to all authorized Connie users within seconds of collection.
- **Transfer to PACS:** Download external images from the Imaging Worklist to your local PACS. Note: not all users will have access to this functionality. Access is determined by facility PACS administrator.

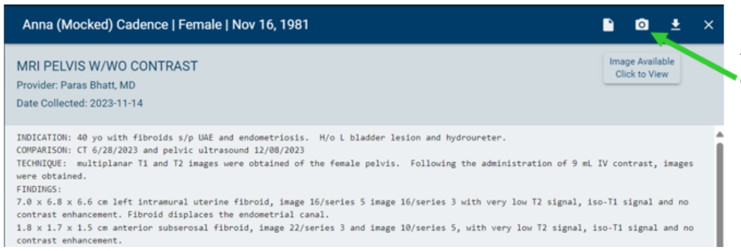
## Report-Level View

### Accessing Images

From the Clinical Information tab, navigate to the Clinical Data tab, then to the Radiology sub tab within Health Records.
**Open an image by:** Clicking on the camera icon to the left of the listed report.




**Opening a report - click on the row that has the report—and click on the image icon.**




To open an image, click on the camera icon here too.

## eHealth Viewer Features

Images accessed within the last 90 days are cached, enabling full diagnostic quality images to open within seconds. Launching the image from the camera icon opens the eHealth Viewer.

From here, you can:

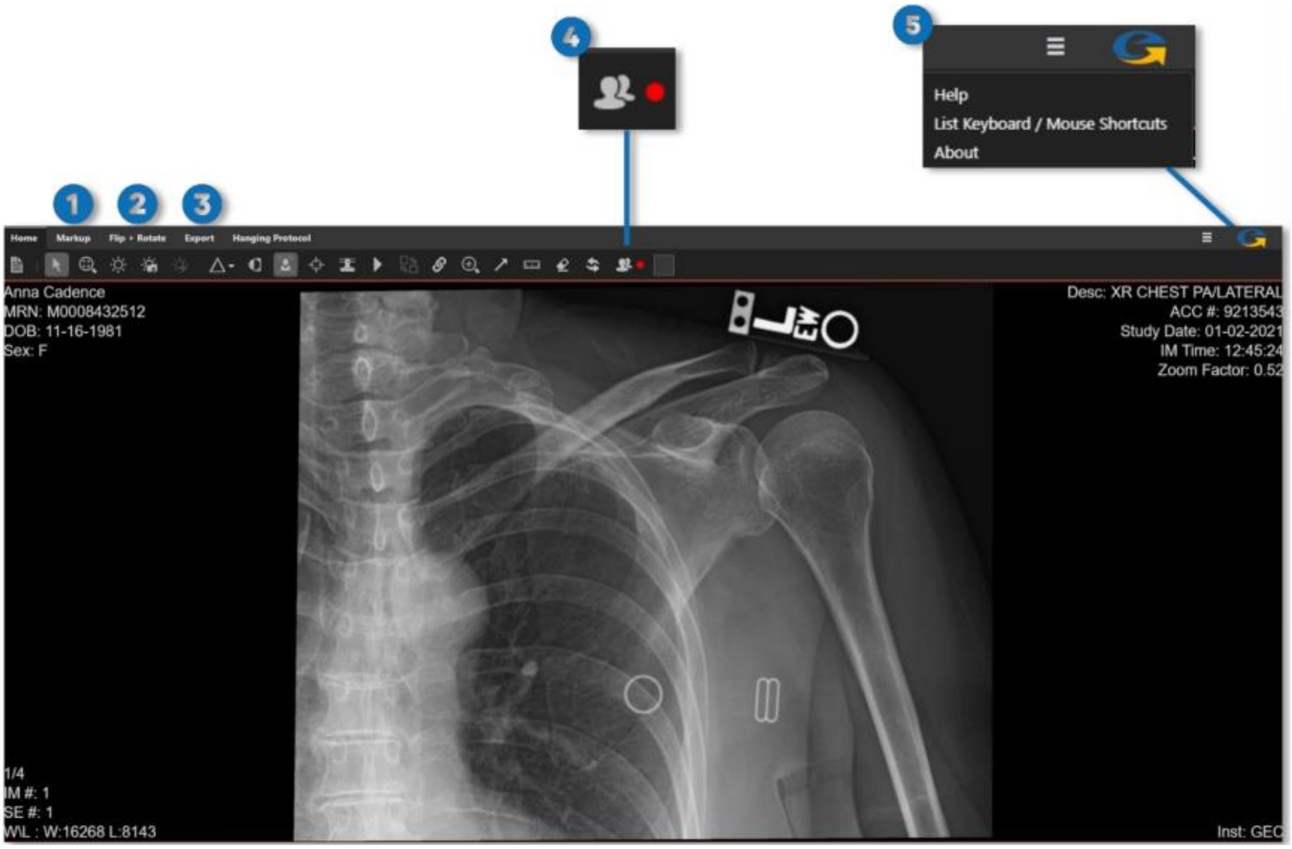
1. **Mark up the image:** There are a number of tools to measure, annotate, and/or outline areas on the image. Hover over any of the tool icons for information about the tools' function. Select the erase tool and then click on any markings you added to erase them.

2. **Flip + rotate the image:** A new tool bar emerges with five options for ways to change your view of the image.

3. **Export:** You can either print or download the image as a JPEG or PNG file. You can vary the quality of the image, however the output is not diagnostic quality.

4. **Collaborate with colleagues in real time:** Select the collaboration button to turn on real time collaboration. The icon turns green when the image is available for joint viewing. Any other user that opens the same image and turns on the collaboration button will be able to see that you are reviewing the image as well. Any mark-ups you or your colleague make to the image will be viewed by both of you.

5. **Access the menu:** The three bars on the upper right of the screen provide access to Help, a list of mouse and keyboard shortcuts, and more about the tool. The Help screen links to a more in-depth user guide developed by the eHealth Viewer vendor, eHealth Technologies.



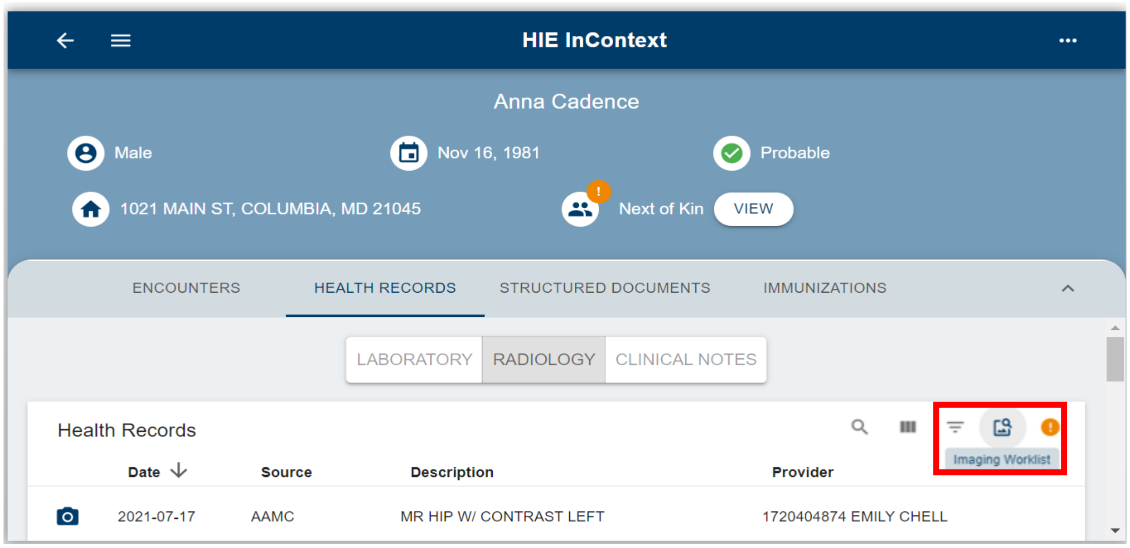

Note: When using the tools to measure or mark up the images, notation will not be saved when exiting the Viewer.

## eHealth Viewer Icons

Select the **Help** icon in the upper right corner for additional information and assistance. Not all functions depicted in the help screens will be available on the eHealthViewer user interface.

### Imaging Worklist

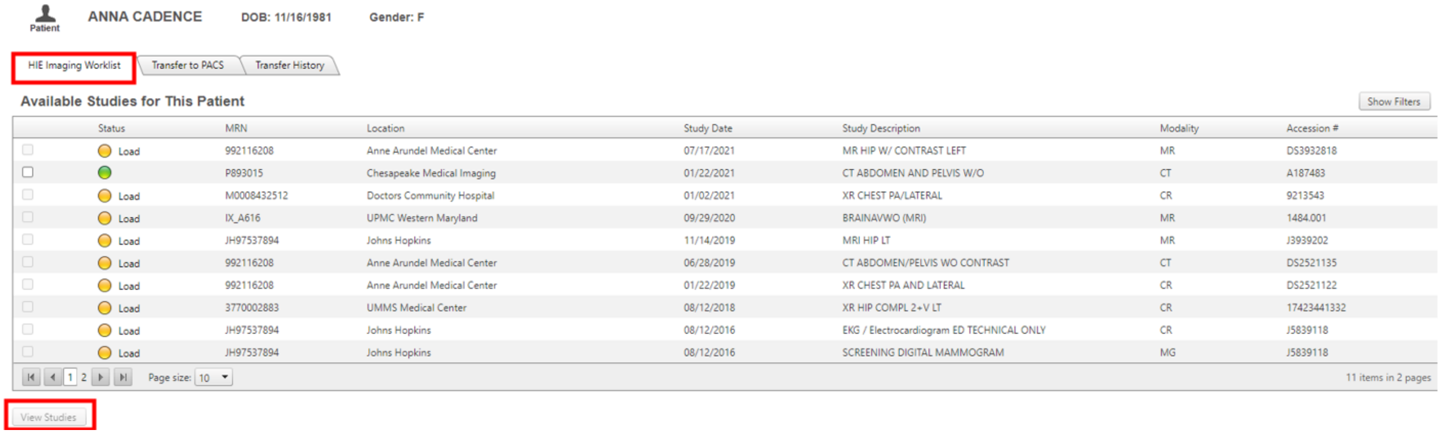
To view a patient's prior images, and compare up to four images simultaneously, click on 'Imaging Worklist.'




## Worklist Features

You can select up to four images in the Imaging Worklist to view at the same time for a single patient. Providers often utilize this feature to view and compare studies.

Select images to compare and click on 'View Studies' to launch the comparison view.




| Status | MRN | Location | Study Date | Study Description | Modality | Accession # |
|---|---|---|---|---|---|---|
| Load | 992116208 | Anne Arundel Medical Center | 07/17/2021 | MR HIP W/ CONTRAST LEFT | MR | DS3932818 |
| | P893015 | Chesapeake Medical Imaging | 01/22/2021 | CT ABDOMEN AND PELVIS W/O | CT | A187483 |
| Load | M0008432512 | Doctors Community Hospital | 01/02/2021 | XR CHEST PA/LATERAL | CR | 9213543 |
| Load | IX_A616 | UPMC Western Maryland | 09/29/2020 | BRAINAVWO (MRI) | MR | 1484.001 |
| Load | JH97537894 | Johns Hopkins | 11/14/2019 | MRI HIP LT | MR | J3939202 |
| Load | 992116208 | Anne Arundel Medical Center | 06/28/2019 | CT ABDOMEN/PELVIS WO CONTRAST | CT | DS2521135 |
| Load | 992116208 | Anne Arundel Medical Center | 01/22/2019 | XR CHEST PA AND LATERAL | CR | DS2521122 |
| Load | 3770002883 | UMMS Medical Center | 08/12/2018 | XR HIP COMPL 2+V LT | CR | 17423441332 |
| Load | JH97537894 | Johns Hopkins | 08/12/2016 | EKG / Electrocardiogram ED TECHNICAL ONLY | CR | J5839118 |
| Load | JH97537894 | Johns Hopkins | 08/12/2016 | SCREENING DIGITAL MAMMOGRAM | MG | J5839118 |

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View Studies


The green icon indicates images available immediately.

The yellow icon indicates that while the images are available to view, they are not cached and there may be a delay in viewing. Click on “load” to cache the image. It could take 1-4 minutes for the image to load depending on the size and type of study.

# Transfer-to-PACS

## Transfer-to-PACS Access

From the Worklist, users that are approved by their PACS administrators will also have access to the Transfer-To-Pacs (TTP) tab.

HIE Imaging Worklist | Transfer to PACS | Transfer History

**Transfer Studies to PACS**

| | Status | MRN | Location | Study Date | Study Description | Modality | Accession # |
|---|---|---|---|---|---|---|---|
| ☑ | | 992116208 | Anne Arundel Medical Center | 07/17/2021 | MR HIP W/ CONTRAST LEFT | MR | DS3932818 |
| ☐ | | P893015 | Chesapeake Medical Imaging | 01/22/2021 | CT ABDOMEN AND PELVIS W/O | CT | A187483 |
| ☐ | | M0008432512 | Doctors Community Hospital | 01/02/2021 | XR CHEST PA/LATERAL | CR | 9213543 |
| ☐ | | IX_A616 | UPMC Western Maryland | 09/29/2020 | BRAINAVWO (MRI) | MR | 1484.001 |
| ☐ | | JH97537894 | Johns Hopkins | 11/14/2019 | MRI HIP LT | MR | J3939202 |
| ☐ | | 992116208 | Anne Arundel Medical Center | 06/28/2019 | CT ABDOMEN/PELVIS WO CONTRAST | CT | DS2521135 |
| ☐ | | 992116208 | Anne Arundel Medical Center | 01/22/2019 | XR CHEST PA AND LATERAL | CR | DS2521122 |
| ☐ | | JH97537894 | Johns Hopkins | 08/12/2016 | EKG / Electrocardiogram ED TECHNICAL ONLY | CR | J5839118 |
| ☐ | | JH97537894 | Johns Hopkins | 08/12/2016 | SCREENING DIGITAL MAMMOGRAM | MG | J5839118 |
| ☐ | | JH97537894 | Johns Hopkins | 08/12/2016 | US PELVIC | US | J5839118 |

Transfer Studies to PACS:

## TTP Features

TTP allows authorized users to download images directly into their PACS. Once selected images are transferred, the MRN will automatically change to match that of the organization prior to download.

This user guide will be updated as new tools are added to Connie's Portal.

If you are having difficulties accessing the Portal or tools are not displaying as described above, please contact help@conniect.org and a member of our Customer Support will respond.

Connie is powered by CRISP technology through our partnership with CRISP Shared Services.