Quick Start Guide
Clinical Portal

HealthInfoNet

All User Roles

Welcome to the Clinical Portal

HealthInfoNet's Clinical Portal gives participating providers the ability to securely look up and retrieve real-time patient medical record information in a view-only screen at the point of care, greatly improving patient safety and care coordination activities.

PATIENT LOOKUP –The Clinical Portal allows providers to look up and retrieve real-time patient medical record information. Each patient's record is tailored to display available care management data relevant for a provider or care manager at the point of care. For more information on the types of data collected by the HIE, click here. Entry to the record is readily accessible, though audited closely for privacy and security purposes.

NOTIFICATION SERVICES – Real-time alerting of time-sensitive events like emergency room visits, critical lab results, and hospital discharges make it possible for care managers and other providers following a patient to intervene early and establish the right care plan. Email-based notifications can be configured, ensuring that critical patient care events trigger immediate follow-on action.

VA CONNECTION – Integrated with the Veterans Affairs (VA) Virtual Lifetime Electronic Record Health Information Exchange (VLER HIE) initiative, the Clinical Portal gives providers the opportunity to securely view and share health information from veterans' national health records. Clinical Portal users are able to easily connect to the VLER HIE system from within the user interface and download a VA Continuity of Care Document (CCD) for their patients.

COMMUNITY SERVICES – Within each patient's medical record is a "Community Services" section that includes available social determinants of health data sent to the HIE from both clinical and non-clinical organizations. The section incorporates data from participating community organizations that are providing non-clinical services that are applicable to clinical conversations, such as non-emergent transportation and housing support.

We're Here to Help

HealthInfoNet's Customer Support team is trained, experienced, and ready to work with you. If you have a question, we'll help find the answer. Reach out to us using the coordinates below and we'll be in touch shortly with more information.

Contact Us Directly

- **Hours**: Monday through Friday – 8am to 4:30pm ET
- **Phone**: 207-541-9250
- **E-mail**: customercare@hinfonet.org

Support at Your Facility

HealthInfoNet has trained a member of each participating organization to assist with support issues so that our users have a local resource. This is typically a member of your Help Desk or IT team. If this is an urgent request, you may decide to contact your local resource first.

Account Setup & Initial Login

Account Authorization

To obtain access to the Clinical Portal online user interface:

1. New users must contact the authorized Help Desk user who has been designated by their organization as the individual responsible for creating new user accounts.

    a. If the user's organization does not have an authorized Help Desk user, contact HealthInfoNet's Customer Support team at customercare@hinfonet.org.

2. Once the authorized Help Desk user, or HealthInfoNet's Customer Support team, has established the new user's account in the system, a welcome email will be sent to the new user with information on how to access the Clinical Portal interface.

Note: Welcome emails do not contain the new user's established User ID for security purposes. Help Desk users/HealthInfoNet's Customer Support team will follow-up separately on the system-generated welcome email to provide the new user with their designated User ID.

Initial Login Workflow

To log in to the Clinical Portal online user interface for the first time:

1. Follow the instructions in the welcome email and click the link to visit the Clinical Portal.

    a. Clinical Portal URL: https://maine.hinfonet.org/concerto/Login.htm

2. Once their browser has opened and the Clinical Portal login page has loaded, users can enter their designated User ID and temporary Password into the provided login fields.

3. Selecting the "Login" button will next prompt users to reset their temporary password to one of their own choosing and which meets the system's password complexity requirements.

    a. Note: New users will be required to reset their passwords for security purposes upon their first login and every 90 days thereafter.

4. Finally, new users will be required to accept the "Treatment Portal" and "Medication History" disclaimers upon their first login.

5. New users will then be approved to enter the portal.

Note: HealthInfoNet recommends that users set their account's "Security Question" upon logging in for the first time. Please see the section on "Password Reset Process" located at the end of this document for more information.
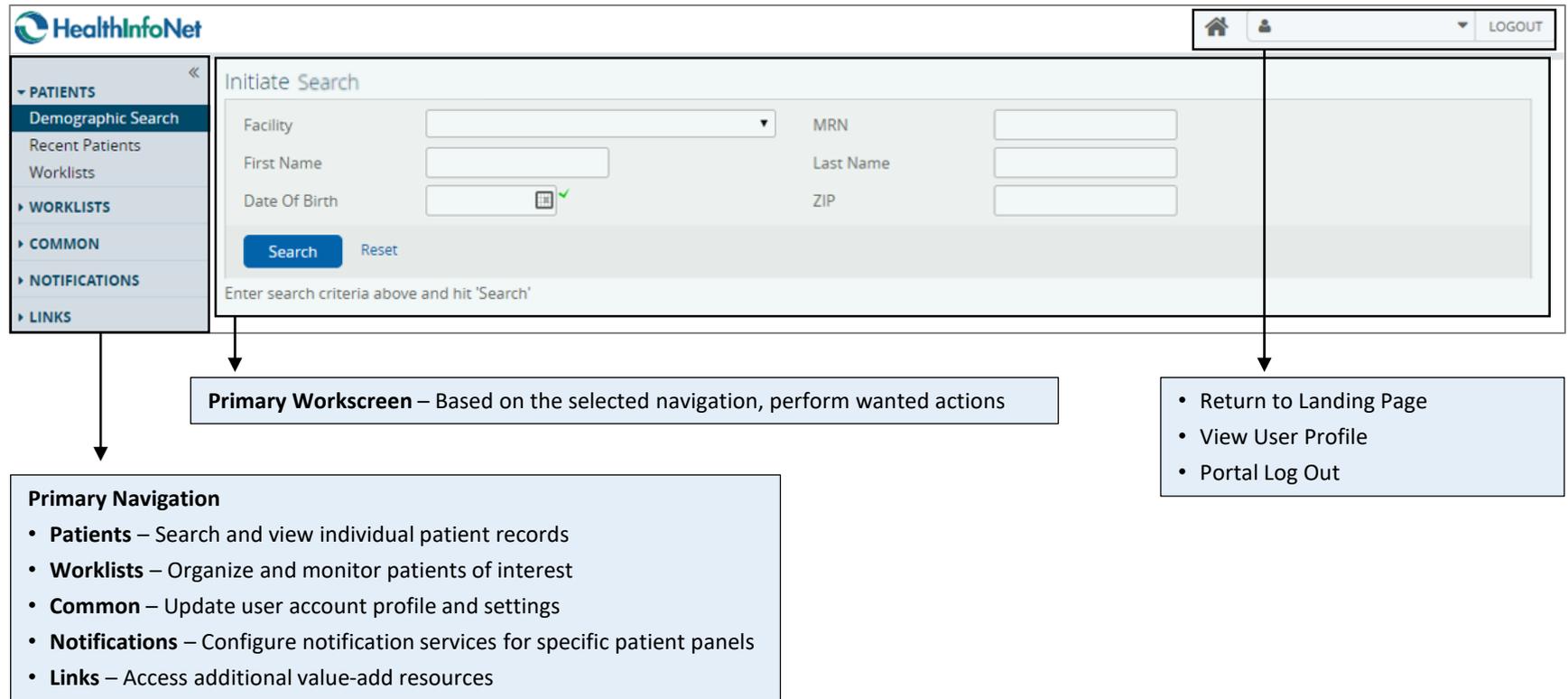
Data Coverage Report

On the login page is a link that brings users to a "Data Coverage" report identifying HealthInfoNet's current provider connections and the data types those providers are sending (Figure 1).

Figure 1. Data Capture Report

The "Data Coverage" report is an important tool for users when trying to understand the type and completeness of data presented on their patients in the Clinical Portal.

Report URL:
https://maine.prod.hinfonet.org/static/HealthInfoNet_data_Coverage.pdf

Landing Page Designs

Clinician/IS Support User Role Landing Page

Upon logging in to the Clinical Portal, users will arrive to the online user interface's default landing page – the patient "Demographic Search" view – with access to additional navigation options.

Core components featured on the landing page are outlined below (Figure 2).

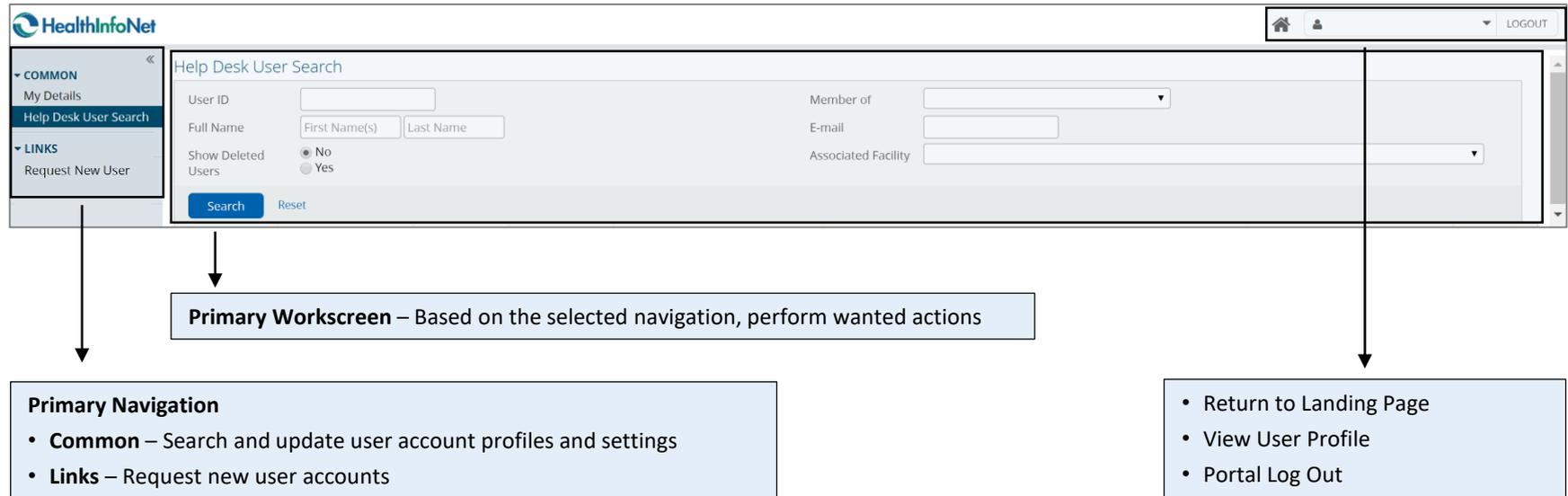**Figure 2.** Clinician/IS Support User Interface Landing Page

Primary Workscreen – Based on the selected navigation, perform wanted actions

- Return to Landing Page
- View User Profile
- Portal Log Out

Primary Navigation
- **Patients** – Search and view individual patient records
- **Worklists** – Organize and monitor patients of interest
- **Common** – Update user account profile and settings
- **Notifications** – Configure notification services for specific patient panels
- **Links** – Access additional value-add resources

Help Desk User Role Landing Page

Upon logging in to the Clinical Portal, users will arrive to the online user interface's default landing page – the "Help Desk User Search" view – with access to additional navigation options.

Core components featured on the landing page are outlined below (Figure 3).

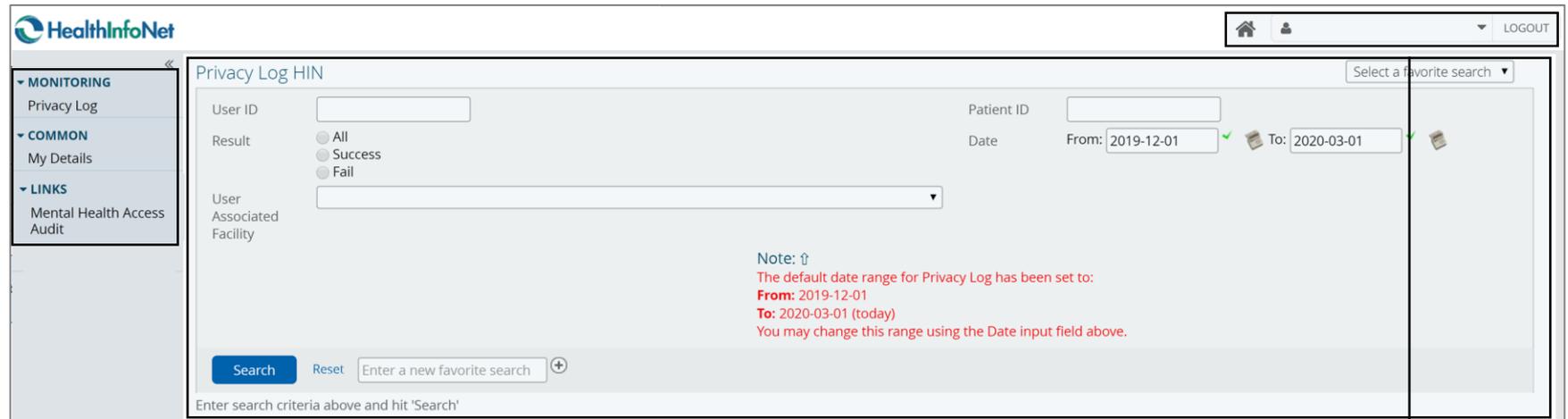**Figure 3.** Help Desk User Interface Landing Page

Primary Workscreen – Based on the selected navigation, perform wanted actions

Primary Navigation
- **Common** – Search and update user account profiles and settings
- **Links** – Request new user accounts

- Return to Landing Page
- View User Profile
- Portal Log Out

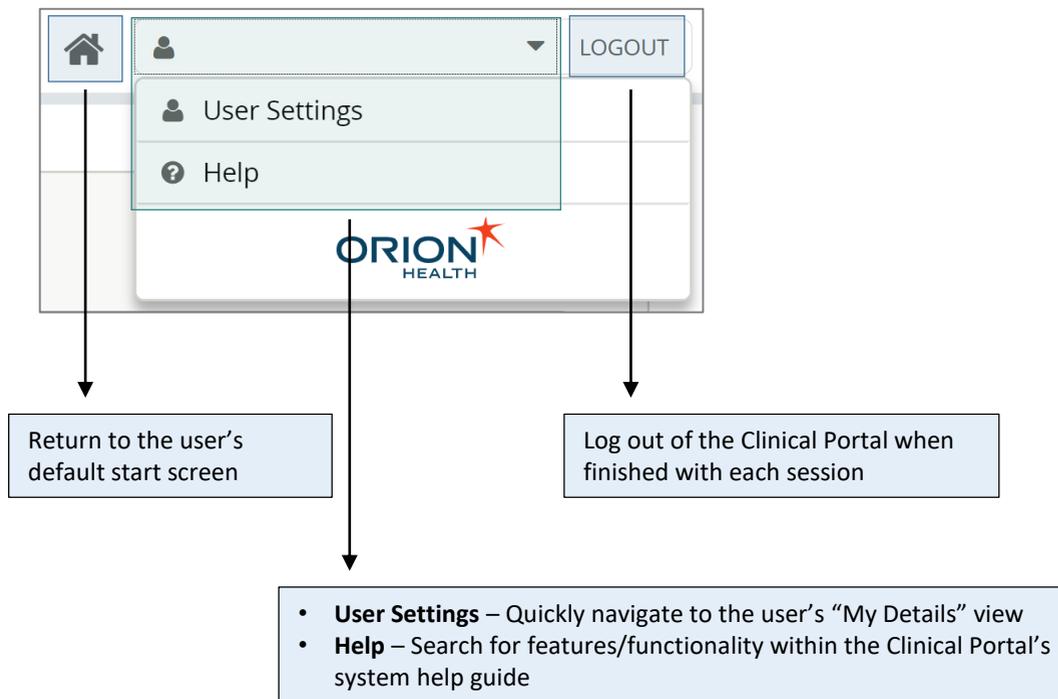# Auditor User Role Landing Page

Upon logging in to the Clinical Portal, users will arrive to the online user interface's default landing page – "Privacy Log" view – with access to additional navigation options.

Core components featured on the landing page are outlined below (Figure 4).

Figure 4. Auditor User Interface Landing Page

Primary Workscreen – Based on the selected navigation, perform wanted actions

- Return to Landing Page
- View User Profile
- Portal Log Out

Primary Navigation

- **Monitoring –** Run privacy audit reports for system activity
- **Common –** Search and update user account profiles and settings
- **Links –** Run mental health access audit reports

Miscellaneous Services

Quick Navigation Functionality

In the upper-right hand corner of the Clinical Portal is the system's "Quick Navigation" functionality. Core components featured in the functionality are outlined below (Figure 5).

Figure 5. User Toggle Drop-Down View

Return to the user's default start screen

Log out of the Clinical Portal when finished with each session

- **User Settings** – Quickly navigate to the user's "My Details" view
- **Help** – Search for features/functionality within the Clinical Portal's system help guide

My Details

Within the "Common" main navigation function, located on the left-hand side of the screen, there is the ability for users to configure their user account settings by selecting the "My Details" option (Figure 6).

Important functionality in the "My Details" view for users to review and consider are outlined below (Figure 7).

Figure 6. My Details Option

▼ COMMON

My Details

Figure 7. My Details View
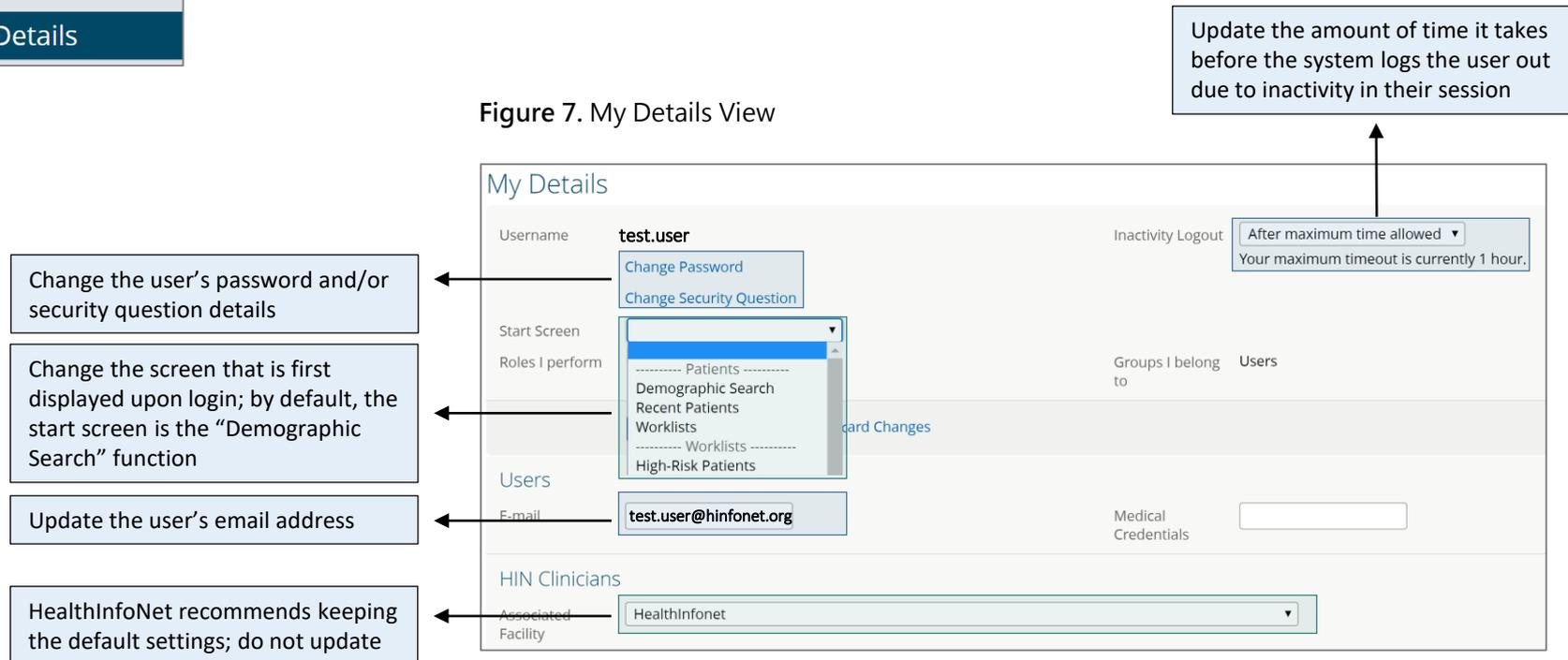
Update the amount of time it takes before the system logs the user out due to inactivity in their session

Change the user's password and/or security question details

Change the screen that is first displayed upon login; by default, the start screen is the "Demographic Search" function

Update the user's email address

HealthInfoNet recommends keeping the default settings; do not update

Password Reset Process

In order for users to be able to reset their passwords, they must proactively set a Security Question for their account. To do so, users can visit the "My Details" option within the "Common" main navigation function and select the "Set My Security Question" link (Figure 8).

Figure 8. Security Question Window

Security Question	▼
Answer	

Setting your security question requires you to type your password.

Password	

OK   Cancel

As long as they have a Security Question set, users will be able to use the "Forgot your password" link located on the portal's login screen to receive instructions to their email on how to reset their password (Figure 9).

Figure 9. Forgot Your Password Link

? Forgot your password?

If users are not able to reset their own password, they can contact their organization's Help Desk user or HealthInfoNet's Customer Support team for assistance.

Clinical Education & Training Opportunities

- In-person and online trainings available for all services; contact clienteducation@hinfonet.org for more information

- Public resources available at https://hinfonet.org/resources/clinical-education/

- HealthInfoNet's online training site also provides courses and CNE credits to better understand and effectively use the HIE; visit http://hinfonetacademy.org/ for more information

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