

Administrator Workflow

Health Information Exchange (HIE) User
Guide for Bidirectional Interface with
myUnity



Netsmart

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Revision History			
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Overview of HIE

Typical responsibilities of a Health Information Exchange (HIE) include aggregating and sharing patient healthcare information across participating providers and organizations in the given region. HIEs participate in the acceptance of patient registration and patient Continuity of Care (CCD) documents from myUnity. Given the proper consent has been given and documented, the submission of patient registration and CCD documents occurs automatically, meaning no myUnity end user intervention is needed.

Most HIE's have a default opt-in for patient data submission, meaning patient consent is not required on the patient-level. Communicate with your chosen HIE vendor for further details on consent policies and whether an org-level consent can be filed.

1. Setting Menu Access Privileges

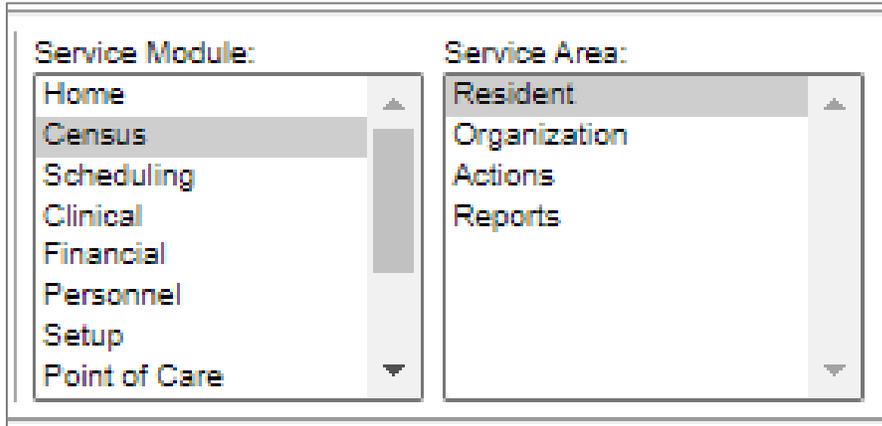
1. Navigate to **Setup > Security > Roles > Menu Access Privileges**.

The screenshot shows the Netsmart myUnity interface. At the top, there is a navigation bar with tabs for Home, Census, Scheduling, Clinical, Financial, Personnel, and Setup. Below this is a sub-navigation bar with tabs for General, Entities, Scheduling, Clinical, Financial, iCare, Workflow, Security, and System. The main content area is titled 'Security' and contains several sections: 'General', 'Roles', and 'Users'. Under the 'Roles' section, there are four links: 'Add/Update Role' (Allows user to add or edit a user to role based security), 'Forms Builder Security' (Allows user to security for forms access by role), 'Menu Access Privileges' (Allows user to setup menu access by role), and 'Workflow Groups' (Allows user to assign workflow rules to a group). The 'Menu Access Privileges' link is highlighted with a red box.

2. In the **Select Role(s)** menu, select the role that needs its access edited. The screenshot below highlights "HMX: Admin Group," but this might not be the naming convention that your organization uses. Identify what your organization's administration role is named, and select the appropriate role in the list

The screenshot shows the 'Menu Access Privileges' dialog box. The 'Roles to Update' field contains 'HMX: Admin Group'. Below this is a 'Select Role(s):' dropdown menu. The dropdown is open, showing a list of roles: 'HH: Mobile View Occupational Therapist', 'HH: Mobile View Occupational Therapist Assistant', 'HH: Mobile View Physical Therapist Assistant', 'HMX API User', 'HMX Monitor', 'HMX: Admin Group' (which is highlighted in blue), 'HS: Bereavement Coordinator', and 'HS: Billing Specialist'.

- In the **Service Module** menu, select **Census**. In the **Service Area** menu, select **Resident** or **Patient**.



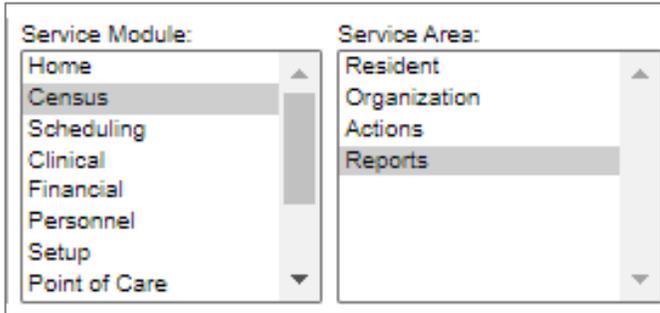
- Under the **Resident Info** or **Patient Info** section, select the **View, Update, Add, and Remove** checkboxes for **Consent to Release Medical Information**. This privilege will allow the user role to see the **Consent to Release** link in the **Demographics** widget within the patient chart. This link is where the user will document patient consent to participate in the exchange.

Resident Info	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Resident Notifications	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Resident User-Defined Data	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accounting of Disclosure	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Admission User-Defined Data	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Affiliations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attachments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Consent to Release Medical Information	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Demographics	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Emergency Preparedness Identifiers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Face Sheet	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General Notes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Location of Service	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Notes Organizer	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Physicians	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Under the **Admission Activity** section, select the **View, Update, Add, and Remove** checkboxes for **Request HIE or CareQuality Provider Document**. This privilege will allow the user role to see the **Request Documents** link in the **Admission** widget within the patient chart. This link is where the user will request external documents from an HIE.

Admission Activity	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Process a Leave of Absence or Hold	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Add Discharge Summary	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admission	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admission Form	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attachments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cancel Discharge	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cancel Admission	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Census History	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Clinical Summary	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create Continuity of Care Document	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Discharge	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hospice Inter-Agency Transfer	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Level of Care	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Switch Beds	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Request HIE or CareQuality Provider Document	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Send Vendor Message	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bed Transfer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

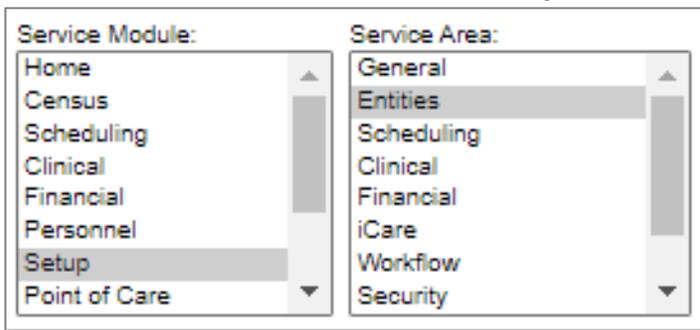
6. Click **Submit** at the bottom of the page.
7. In the **Service Module** menu, select **Census**. In the **Service Area** menu, select **Reports**.



8. Under the **General** section, select the **View** checkbox for **Consent to Release Medical Information Report**. This privilege will allow the user to create a **Consent to Release Medical Information Report**.

Reports	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
General	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Resident Birthday List	<input checked="" type="checkbox"/>			
Resident Directory	<input checked="" type="checkbox"/>			
Resident Payer Setups	<input checked="" type="checkbox"/>			
Resident Relationships	<input checked="" type="checkbox"/>			
Accounting of Disclosure Report	<input checked="" type="checkbox"/>			
ACH Account Report	<input checked="" type="checkbox"/>			
Activity Census Report	<input checked="" type="checkbox"/>			
Activity Census Detail Report	<input checked="" type="checkbox"/>			
Admission Source List	<input checked="" type="checkbox"/>			
Authorizations Report	<input checked="" type="checkbox"/>			
Bundled Payment Resident Tracking	<input checked="" type="checkbox"/>			
Case Assignment Report	<input checked="" type="checkbox"/>			
Case Mix Index	<input checked="" type="checkbox"/>			
Census Changes Report	<input checked="" type="checkbox"/>			
Census Level of Care Report	<input checked="" type="checkbox"/>			
Certifications Report	<input checked="" type="checkbox"/>			
Consent to Release Medical Information Report	<input checked="" type="checkbox"/>			
Demographics Report	<input checked="" type="checkbox"/>			
Demographics Worksheet	<input checked="" type="checkbox"/>			

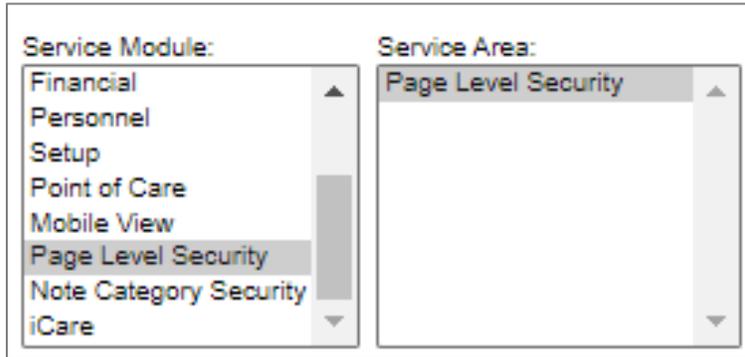
9. Click **Submit** at the bottom of the page.
10. In the **Service Module** menu, select **Setup**. In the **Service Area** menu, select **Entities**.



11. Under the **HIE and CareQuality Providers** section, select the **View**, **Update**, **Add**, and **Remove** checkboxes for **HIE and CareQuality Provider Favorites**. This privilege will allow the user role to view, update, add, and remove HIE favorites under the **Setup** tab. It is up to your organization to determine whether it is appropriate for this privilege to be given to clinical roles.

HIE and CareQuality Providers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Configure HIEs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
HIE and CareQuality Provider Favorites	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

12. Click **Submit** at the bottom of the page.
13. In the **Service Module** menu, select **Page Level Security**. In the **Service Area** menu, select **Page Level Security**.



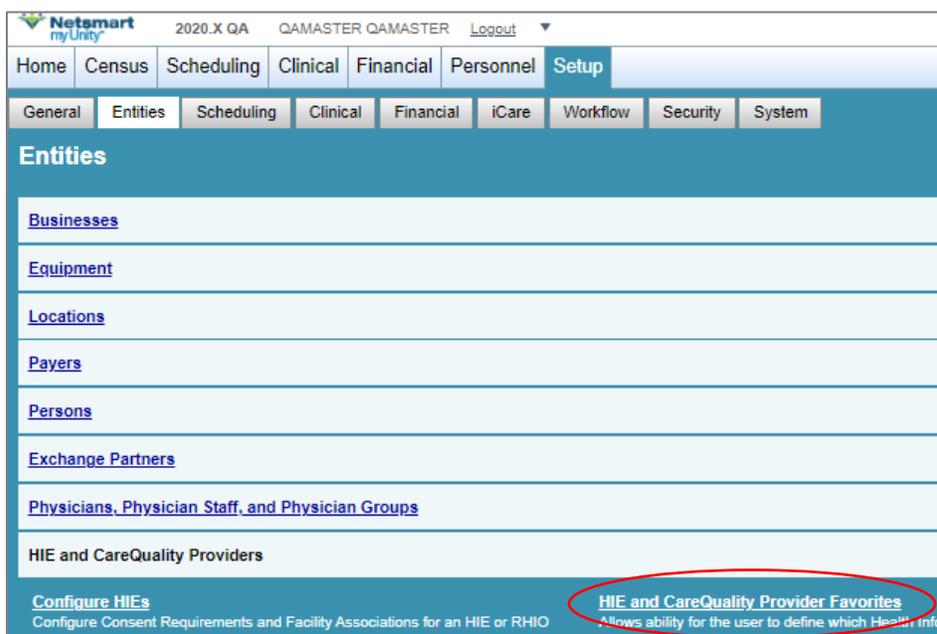
14. Under the **Page Level Security** section, select the **View** checkbox for **Access Clinical Reconciliation Tool**. This privilege will allow the user role to import medication, problems, and allergies from HIE documents into the patient charts.

Page Level Security	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Page Level Security	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Care Plan PGI Custom Tab	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Access Clinical Reconciliation Tool	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Access Test.asp and Test.aspx	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Access Web API	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

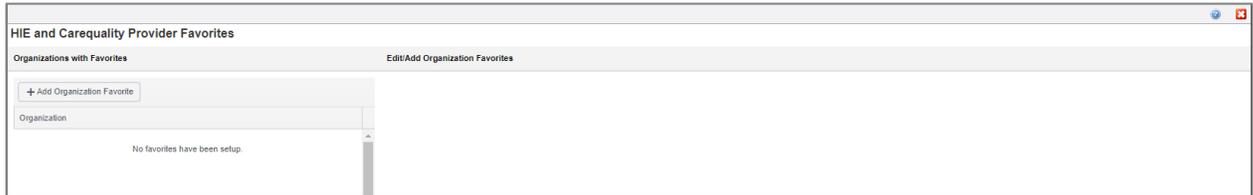
15. Click **Submit** at the bottom of the page.
16. Repeat Steps 2-15 for additional administration and clinical roles.

2. Adding HIE Favorites to a New Org Favorite

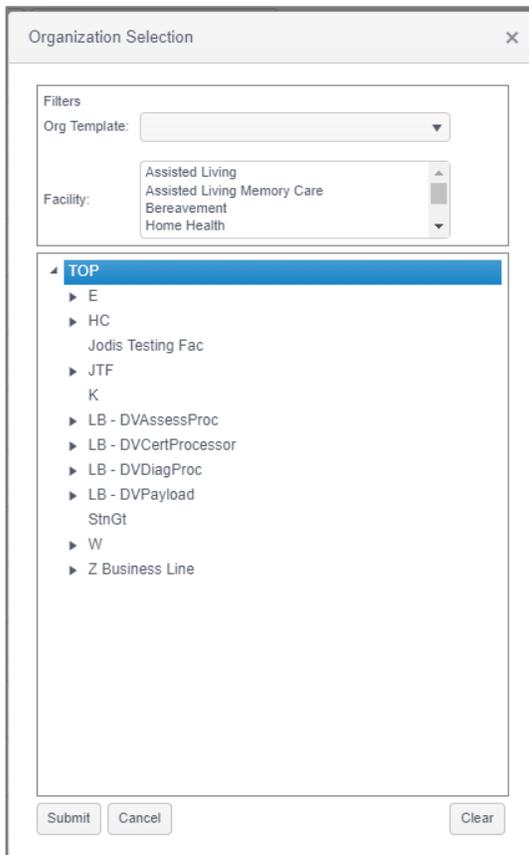
1. Navigate to **Setup > Entities > HIE and CareQuality Providers > HIE and CareQuality Provider Favorites**.



- When the **HIE and CareQuality Provider Favorites** page is opened for the first time, no organization favorites will display. Click the **+ Add Organization Favorite** button to create an organization favorite.



- The **Organization Selection** pop-up appears. Click the gray arrows to drill down the organization hierarchy. Click on the organization level that should be created as an organization favorite; the organization level will be highlighted in a blue bar. Multiple organization levels cannot be selected simultaneously. Click the **Submit** button in the lower-left hand corner of the pop-up window after all selections have been made. Note that your organization's hierarchy will use different names than what is shown in the screenshot below.



- If organization favorites are configured for both higher-level and lower-level organizations, the myUnity end user will be able to view the favorite list for the organization that the patient is admitted to as well as the favorite list of any organization above that admitting organization in the hierarchy. For example, if 1) a patient is admitted to Building A, 2) Building A is a part of Facility 1 in the organization hierarchy, and 3) HIE favorite lists have been configured for both Building A and Facility 1, then the myUnity end user will be able to see HIE favorites from both the Building A and Facility 1 HIE favorite lists when requesting documents for that patient.

- The screen returns to the **HIE and Carequality Provider Favorites** page. Notice that the organization level selected in Step 3 is listed in bold at the top of the screen. No favorites will appear in the favorites table yet.

- Click the **+ Add HIE Favorite** button.



- The **Search HIE** window opens. Click the **Add To List** button for the appropriate HIE(s) that should be queried.

- Multiple HIEs can be added to the list at the same time from this window.

- Once an HIE has been added to the list, the **Add To List** button will appear dithered for that HIE. Click the **X Close** button or **X** button in the upper-right hand corner.

- The screen returns to the **HIE and Carequality Provider Favorites** page. Notice that the favorites table lists the selected HIE(s) from Step 6.

- The table can be sorted by **Type** (HIE or Carequality Provider), **Name**, and **Location** by clicking on the appropriate column headers.

3. Adding HIE Favorites to an Existing Org Favorite

1. Navigate to **Setup > Entities > HIE and CareQuality Providers > HIE and CareQuality Provider Favorites**.

The screenshot shows the Netsmart myUnity interface. At the top, the user is logged in as QAMASTER QAMASTER. The main navigation bar includes Home, Census, Scheduling, Clinical, Financial, Personnel, and Setup. Under the Setup menu, there are sub-tabs for General, Entities, Scheduling, Clinical, Financial, iCare, Workflow, Security, and System. The Entities sub-tab is selected, displaying a list of entity categories: Businesses, Equipment, Locations, Payers, Persons, Exchange Partners, Physicians, Physician Staff, and Physician Groups, and HIE and CareQuality Providers. The 'HIE and CareQuality Provider Favorites' link is circled in red.

2. The **HIE and CareQuality Provider Favorites** page opens. Click the organization favorite in the left-hand column that needs to be edited. Note that your organization's hierarchy will use different names than what is shown in the screenshot below.

The screenshot shows the 'HIE and Carequality Provider Favorites' page. The page title is 'HIE and Carequality Provider Favorites'. Below the title is a section 'Organizations with Favorites' containing a '+ Add Organization Favorite' button. Below that is a table with columns 'Organization' and 'Name'. The table shows a hierarchy: TOP, and TOP\HC\HS\HSEP\EPHS\HS Enterprise.

- a. The right-hand side of the page populates with the organization's current HIE favorites.

The screenshot shows the 'Edit/Add TOP\Z Business Line Favorites' page. The page title is 'Edit/Add TOP\Z Business Line Favorites'. Below the title are two buttons: '+ Add HIE Favorite' and '+ Add Carequality Provider Favorite'. Below that is a table with columns 'Type', 'Name', and 'Location'. The table shows a row for 'Health Information Exchange (HIE)' with 'UPHIE' in the Name column. A 'Remove' button is visible in the bottom right corner.

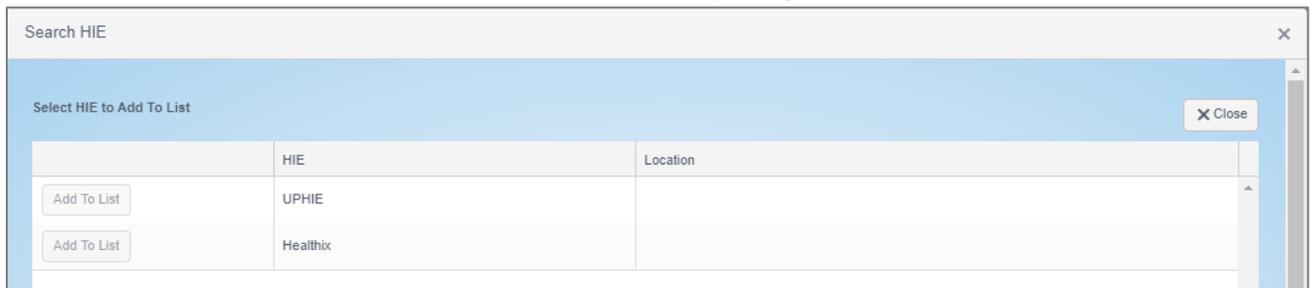
- i. The table can be sorted by **Type** (HIE or Carequality Provider), **Name**, and **Location** by clicking on the appropriate column headers.
3. Click the **+ Add HIE Favorite** button.



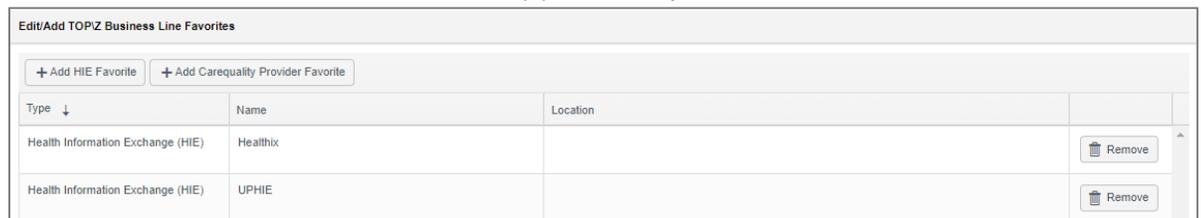
- a. Multiple HIEs can be added to the list at the same time from this window.
 - b. If the HIE is already present as an HIE favorite for the selected organization, the **Add To List** button will be dithered and unactionable.
4. The **Search HIE** window opens. Click the **Add To List** button for the appropriate HIE(s) that should be queried.



- a. Multiple HIEs can be added to the list at the same time from this window.
 - b. If the HIE is already present as an HIE favorite for the selected organization, the **Add To List** button will be dithered and unactionable.
5. Once an HIE has been added to the list, the **Add To List** button will appear dithered for the that HIE. Click the **X Close** button or **X** button in the upper-right hand corner.



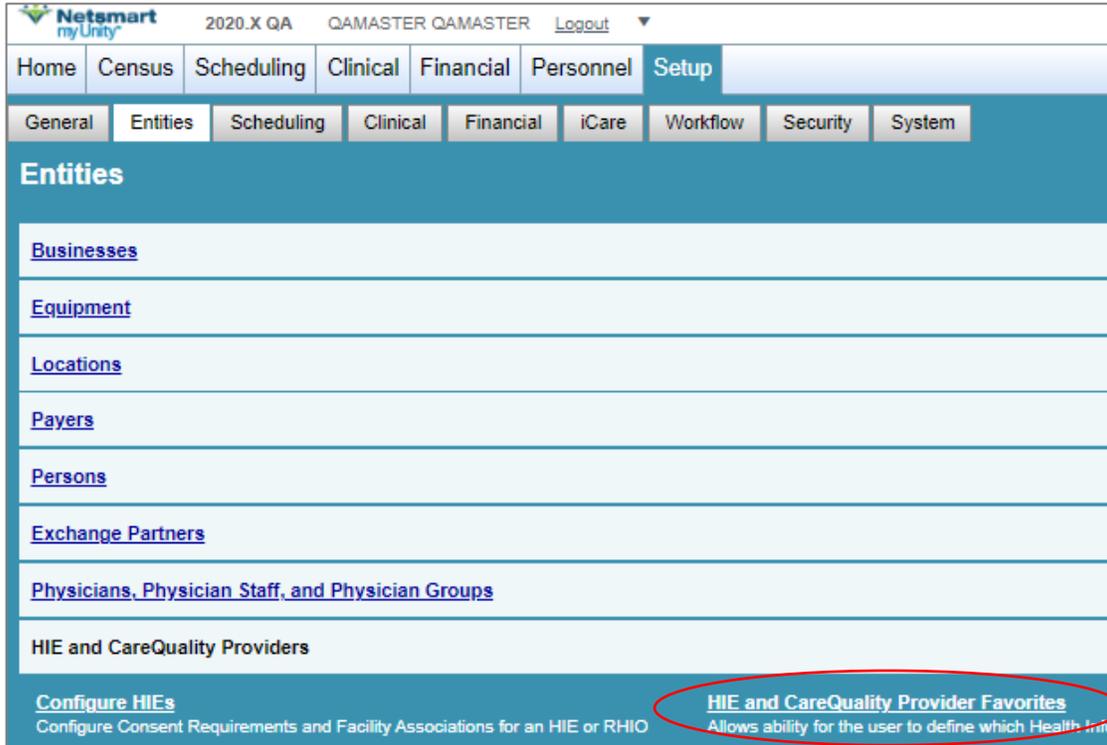
- a. The screen returns to the **HIE and Carequality Provider Favorites** page. Notice that the favorites table lists the selected HIE(s) from Step 5.



- i. The table can be sorted by **Type** (HIE or Carequality Provider), **Name**, and **Location** by clicking on the appropriate column headers.

4. Removing HIE Favorites from an Existing Org Favorite

1. Navigate to **Setup > Entities > HIE and CareQuality Providers > HIE and CareQuality Provider Favorites**.



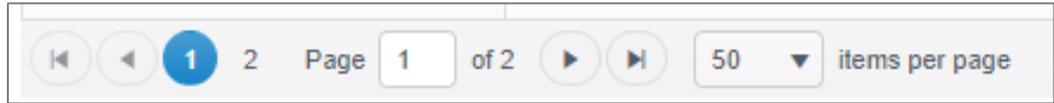
2. The **HIE and CareQuality Provider Favorites** page opens. Click the organization favorite in the left-hand column that needs to be edited. Note that your organization’s hierarchy will use different names than what is shown in the screenshot below.



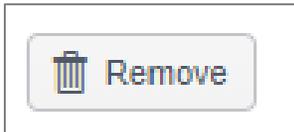
- a. The right-hand side of the page populates with the organization’s current HIE favorites.



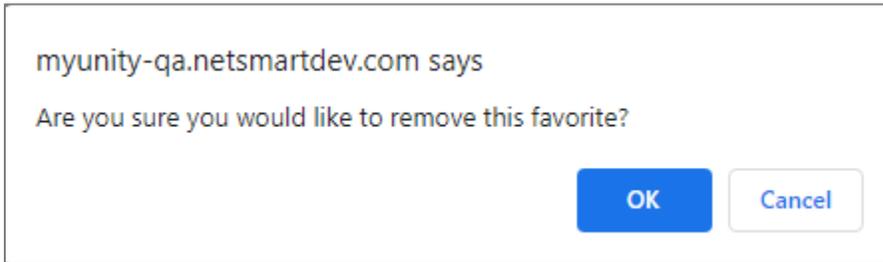
- i. The table can be sorted by **Type** (HIE or Carequality Provider), **Name**, and **Location** by clicking on the appropriate column headers.
- ii. If the HIE to be removed is not visible on the favorites list, move to a different page or change the number of results per page.



3. Click the Remove button that corresponds with the HIE favorite to be removed.



4. A pop-up will appear asking for confirmation on whether this HIE favorite should be removed. Click **OK** if the HIE favorite should be removed. Click **Cancel** to keep the HIE favorite on the list.



- a. Notice that the removed HIE no longer appears in the HIE favorites table on right-hand side of the page.