

## Quick Reference Guide – Level 1

### Menu and Icons

#### **Patients: Locate a patient's medical record**

- Patient Search
- Recent Patients
- Worklists

#### **Worklists: Patient Worklists**

- Red, Blue, Yellow, Green, Orange, and Purple

#### **Notifications: Subscribe to notifications when a specific event occurs for a patient**

- My Subscriptions

#### **Direct Secure Messaging: Send and receive Direct Secure Email**

- Secure Mail

#### **Common: Maintain user account details**

- My Details
- Worklists

#### **Autohide**

- Hide the menu bar

#### **Home**

- Displays User Homepage

#### **Help**

- Provides context specific help

#### **Patient Summary Tab**

- Patient Summary screen for selected patient

#### **Timeline View Tab**

- Encounters and Results over time for selected patient

### Overview

The tips outlined in the Quick Reference Guide are designed to assist Level 1 users with frequently referenced items.

### Patient Search

- Enter EMR (Local) Identifier (MRN for example) and System Name (facility name) **OR** demographic information (DOB, Sex, Last Name, First Name)

### Clinical Document View (CDV) Tree Behavior

- Hover the mouse over a document title to view document details
- Click on the document to view the complete report
- **Abnormal** test results are displayed in **RED** with one asterisk \*
- **Critically** abnormal test results are displayed in **RED** with two asterisks \*\*
- Cumulative reports may be graphed by selecting one or more test line items and clicking **Graph**

### Send a CCD

- To send a CCD: from within Patient Record, select **Clinical Content>Patient Snapshot**
- Click **Send to Direct**
- File populates and sends
- Additional options are Download, Print, and View CDA and Customize

### My Details

- Change Password
- Change Inactivity Timeout
- Set Security Question
- Change Homepage display

### Notifications

- **My Subscriptions:** Change subscription options for patients the user has a relationship with (Level 1 ONLY). Modify notifications to DSM, Email

### Additional Information

For detailed information regarding the use and features of Clinical Portal, please reference the Primary Provider User Manual.

Please contact the Help Desk **for** assistance.