Physician Portal – Easy Intro Guide – Part 1

Objectives

Upon successful completion of this guide book, you will be able to:

- logging into the Portal
- access a patient list
- perform a patient search
- view results
- view and print a facesheet
- exit the Portal
### Getting Started

#### Log in screen

Below is the Horizon Physician Portal log-in screen used while in the hospital and offsite.

![Abrazo Health Care](image)

Welcome to the **Physician Portal**

<table>
<thead>
<tr>
<th>Username</th>
<th>Password</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Physician Support Hotline**

Mon - Fri (0700 – 1900)

602-674-6966

**Authorized Users Only!**

If you are not currently a hospital employee or authorized business partner, then you probably found this page in error and are welcome to visit our **main web site** instead.

*If this is your first visit, please read the the [Physician Portal Browser Setup Page](#).*

---

#### Logging in

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | In the hospital, Click the Horizon Physician Portal icon on the desktop.  
Or  
In the hospital or outside, In your web browser address bar, enter: **http://portal.abrazohealth.com** |
<p>| 2    | Enter your username. (username is case sensitive) |
| 3    | Enter your password. (password is case sensitive) |
| 4    | Click the <strong>Log In</strong> button. |</p>
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Note:</strong></td>
<td>On this screen, you also see the &quot;Message of the Day&quot;. The message of the day will contain pertinent broadcast information for all users.</td>
</tr>
</tbody>
</table>

**My Patients**

The **My Patients** module contains your **Working Patient List**. This allows you to quickly and easily locate the patients for whom you have relationships.

**Note:**

The **CM Working Patient List** is populated by an interface. You cannot add or remove patients from this list.

Patient List is controlled by the Hospital Information System, only the following relationships are automatically added:

- Admitting
- Attending
- Primary Care
Selecting Individual Patients from the CM Working Patient List

---

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | Do one of the following:  
|      | • Select the patient  
|      |   • in the **Patient Name** column, click the link for the patient you want to select.  
|      |   or  
|      |   • Click the check box next to each patient you want to select.  
|      |   • Click **Use Selected**  
| 2    | Result: The **Results** module is displayed. |
Search

Overview
The Patient Search module allows you to select the patient for whom you want to view clinical data in other modules in the viewer. A selected patient becomes the current patient until you select a different patient.

Patient Search
The MPI search allows you to search for any patient who has at least one discharged encounter.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | In the Last Name box, enter one of the following types of search criteria:  

  • Last name  

  OR  

  • Name (Last, First, Middle format)  

  OR  

  • Medical Record Number.  

| 2    | If the first name was not entered in the Last Name field, you may enter it in the First Name field.  

| 3    | Click Search.  

Selecting from search results screen
Step | Action
--- | ---
1 | Search for patients that match the criteria you entered.
2 | Do one of the following:
   • Select the patient
     • in the **Patient Name** column, click the link for the patient you want to select.
   OR
   • Select an encounter
     • click the **Visits** button for the patient you want to select and then click a link in the Ext. Enc. ID column.

Result: The **Results** module is displayed.
Results

Overview

The Results module allows you to view a list of resulted orders for a patient and select one or more items in order to view the test results. Available results will display the most recent results first.

The Personal Worklist is a sub-module of the Results module and enables you to create and maintain a worklist of patients for follow-up and review of notes.
There are several ways to view results.

- Click the test name (highlighted in blue) to access detailed results on one test.

- If you want to view multiple test results, select the tests using the check box on the left and click **Show Selected Results**.

- To see all results at once, click **Show All Results**.

<table>
<thead>
<tr>
<th>Relative</th>
<th>Collected</th>
<th>Links</th>
<th>Item (Order Number)</th>
<th>Status</th>
<th>History</th>
<th>Accession</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/03/05</td>
<td>12:26</td>
<td></td>
<td>NURSING MEDICATION (NO PCP, UNKNOWN)</td>
<td>F</td>
<td></td>
<td>7021051714-31</td>
</tr>
<tr>
<td>11/03/05</td>
<td>12:26</td>
<td></td>
<td>BASIC METABOLIC (NO PCP, UNKNOWN)</td>
<td>Final</td>
<td></td>
<td>7021051714-36</td>
</tr>
<tr>
<td>11/03/05</td>
<td>12:26</td>
<td></td>
<td>BMP (NO PCP, UNKNOWN)</td>
<td>F</td>
<td></td>
<td>7021051714-32</td>
</tr>
<tr>
<td>11/03/05</td>
<td>12:26</td>
<td></td>
<td>CMP MINUS BMP (NO PCP, UNKNOWN)</td>
<td>F</td>
<td></td>
<td>7021051714-17</td>
</tr>
<tr>
<td>11/03/05</td>
<td>12:26</td>
<td></td>
<td>CMP PANEL (SKELED) (NO PCP, UNKNOWN)</td>
<td>F</td>
<td></td>
<td>7021051714-55</td>
</tr>
<tr>
<td>11/03/05</td>
<td>12:26</td>
<td></td>
<td>CRP (HIGH SENS) (NO PCP, UNKNOWN)</td>
<td>F</td>
<td></td>
<td>7021051714-23</td>
</tr>
<tr>
<td>11/03/05</td>
<td>12:26</td>
<td></td>
<td>LIPID PROFILE (NO PCP, UNKNOWN)</td>
<td>F</td>
<td></td>
<td>7021051714-34</td>
</tr>
<tr>
<td>11/03/05</td>
<td>12:26</td>
<td></td>
<td>VIREN DRUG SCREEN (NO PCP, UNKNOWN)</td>
<td>F</td>
<td></td>
<td>7021051714-20</td>
</tr>
<tr>
<td>11/03/05</td>
<td>12:26</td>
<td></td>
<td>ABO/D TYPE (NO FAMILY PHYSICIAN, PCP)</td>
<td>Final</td>
<td></td>
<td>4002547864-00015-1 ABO/D TYPE</td>
</tr>
<tr>
<td>11/03/05</td>
<td>12:26</td>
<td></td>
<td>ANTIBODY SCREEN (NO FAMILY PHYSICIAN, PCP)</td>
<td>Final</td>
<td></td>
<td>4002547864-00015-1 ABO/D TYPE</td>
</tr>
<tr>
<td>11/03/05</td>
<td>12:26</td>
<td></td>
<td>POLY SPECIFIC DIRECT COOMBS (NO FAMILY PHYSICIAN, PCP)</td>
<td>Final</td>
<td></td>
<td>4002547864-00014-1 POLY SPECIFIC DIRECT COOMBS</td>
</tr>
</tbody>
</table>
Results, continued

To narrow your search:

- You may consider changing the number of days in the "Start On" field and the "Go Back" box. The greater number of days you enter, the longer the search and the more results to navigate.
- Perform a Procedure Description Search.
- Select one of the following:
  - New results
  - Today’s results
  - Results by test class

Note:
If you select Show All Results, only the first 25 results will display.
To view results 26+, you will need to return to the result list and select the results you wish to view.
Results, continued

Result level labels

Result levels will be color coded until the result is viewed. Once the result is viewed, the color will disappear, but the label will still display. The label "S/A" or "PAN" will continue to display after viewing the result. A New/normal result label will disappear after viewing the result.

<table>
<thead>
<tr>
<th>Result label</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>S/A</td>
<td><img src="Image" alt="SIA" /></td>
<td>Stat or Abnormal results will be yellow.</td>
</tr>
<tr>
<td>New</td>
<td><img src="Image" alt="New" /></td>
<td>New results will be green.</td>
</tr>
<tr>
<td>Pan</td>
<td><img src="Image" alt="Pan" /></td>
<td>Critical or panic results will be red.</td>
</tr>
</tbody>
</table>

Note: If a result is viewed, the letter "V" will display in the RsltLvl column.
Results, continued

Viewing result details

With result details displayed, you can do the following:

<table>
<thead>
<tr>
<th>Viewing options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Back to List</td>
<td>Return to the orders list.</td>
</tr>
<tr>
<td>Select All Tests</td>
<td>Allows you to view Check 5 results for all components for the current test.</td>
</tr>
<tr>
<td>Check 5 on All Selected</td>
<td>Allows you to view Check 5 results for one or more selected components of a test. A Check 5 chart displays the last five results of each selected component in the current test. In addition, you can choose to include graphs of the results for each component in the Check 5 chart. Note: Graphs are available for up to 10 successive results.</td>
</tr>
</tbody>
</table>
The **Facesheet** module allows you to view and print basic demographic data about the current patient and the patient's most recent encounter. You can view all historical and current (active) encounter information for the patient from the **Patient Demographics** module.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click the <strong>Facesheet</strong> module.</td>
</tr>
<tr>
<td>2</td>
<td>If a patient is selected, the patient information will display in the <strong>Patient Demographics</strong> module as well as the <strong>Facesheet</strong>.</td>
</tr>
<tr>
<td>3</td>
<td>If the patient is not selected, select the patient name from the <strong>Patient</strong> section to display the <strong>Patient Demographics</strong> and <strong>Facesheet</strong>.</td>
</tr>
<tr>
<td>4</td>
<td>Use the scroll arrows to scroll through the list of patient names.</td>
</tr>
</tbody>
</table>
### Module sections

The **Facesheet** module has the following three sections:

<table>
<thead>
<tr>
<th>Module Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient</td>
<td>This section enables you to quickly scroll from one patient to the next, or use the drop-down menu to select from a list of patients.</td>
</tr>
</tbody>
</table>
| Patient Demographics | The following information on each patient is contained in this section:  
  - Patient name  
  - Admission date  
  - Sex  
  - Age  
  - Location  
  - Relationship  
  - Admitting diagnosis  
  - Attending physician |
| CM Facesheet       | A large area containing detailed information related to patient, pertinent physicians, and insurance. |
Clinical Repository (Flowsheet)

Overview

The Clinical Repository module currently has one sub-module - Flowsheet. When other applications such as online documentation and order management are implemented, additional sub-modules will be added to this module.

The Flowsheet module allows you to view flowsheet reports that have been built using the Flowsheet Builder.
Clinical Repository (Flowsheet), continued

Flowsheet report

The flowsheet report contains collected and recorded result data for a selected patient across all encounters. Results will display in alphabetical order.

```
<table>
<thead>
<tr>
<th>COMPREHENSIVE METABOLIC PANEL</th>
<th>03/06/06</th>
<th>17:00</th>
</tr>
</thead>
<tbody>
<tr>
<td>NA</td>
<td>156 H</td>
<td></td>
</tr>
<tr>
<td>POTASSIUM</td>
<td>4.7 E</td>
<td></td>
</tr>
<tr>
<td>CHLORIDE</td>
<td>132 H</td>
<td></td>
</tr>
<tr>
<td>CO2</td>
<td>34</td>
<td></td>
</tr>
<tr>
<td>GLUCOSE</td>
<td>89</td>
<td></td>
</tr>
<tr>
<td>K+</td>
<td>23 H</td>
<td></td>
</tr>
<tr>
<td>CREATININE</td>
<td>4.0</td>
<td></td>
</tr>
<tr>
<td>TOTAL PROTEIN</td>
<td>7.2</td>
<td></td>
</tr>
<tr>
<td>ALBUMIN</td>
<td>3.4</td>
<td></td>
</tr>
<tr>
<td>CALCIUM</td>
<td>10.5 H</td>
<td></td>
</tr>
<tr>
<td>BILI TOTAL</td>
<td>1.78 H</td>
<td></td>
</tr>
<tr>
<td>SODIUM</td>
<td>132.8</td>
<td></td>
</tr>
<tr>
<td>AIR PHOS</td>
<td>67</td>
<td></td>
</tr>
<tr>
<td>SODIUM</td>
<td>132.8</td>
<td></td>
</tr>
<tr>
<td>MAGNESIUM</td>
<td>Back to Top</td>
<td>03/06/06</td>
</tr>
<tr>
<td>SODIUM</td>
<td>14.55</td>
<td></td>
</tr>
<tr>
<td>CKMB SCR</td>
<td>Back to Top</td>
<td>03/06/06</td>
</tr>
</tbody>
</table>
```
Clinical Repository (Flowsheet), continued

Viewing a report

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select the patient for whom you want to view flowsheet data.</td>
</tr>
<tr>
<td>2</td>
<td>In the <strong>Report</strong> drop-down list, select the type of flowsheet report you want to view.</td>
</tr>
<tr>
<td>3</td>
<td>In the <strong>Time Interval</strong> drop-down list, specify the time summary interval for the data displayed in each flowsheet column.</td>
</tr>
<tr>
<td>4</td>
<td>Search for data by <strong>Encounter</strong> or by selecting the <strong>Start On</strong> radio button and entering the number of previous search days in the <strong>Go Back</strong> box.</td>
</tr>
</tbody>
</table>
| 5    | Click **Refresh**.  
**Result:** The specific flowsheet report is displayed. |
Deficiencies

Overview

The Deficiencies module allows you to view medical record deficiencies and provides you with the ability to complete the deficiencies.
Deficiencies, *continued*

Setting preferences

**Important:** The first time you select the **Deficiencies** module, your preferences need to be set

1. Click *Edit* and the following page is displayed:

   ![Default Deficiency Set](image)

   **Default Deficiency Set:**

   **Default Deficiency Type:**

   - Signature
   - Dictation
   - Missing Text

   **Page to View Documents:**

   **Change PIN Code:**

   Enter old PIN code:

   Enter new PIN code:

   Re-enter new PIN code:

   Update old Update without PIN  [cancel]

2. The **Default Deficiency Set** is set to **Individual**.

3. Select your **Default Deficiency Type**.
   - Signature
   - Dictation
   - Missing Text
Deficiencies, continued

4 In the Page to View Documents drop down menu, select Document Viewer.

5 You may also change your PIN Code, if desired.
6 Click update all (if updating your PIN) or update without PIN.
### Deficiencies, continued

#### Deficiency status

**Deficiency status:**

Note: Each deficiency status is identified by a color.

- Incomplete (blue)
- Warning (tan)
- Delinquent (yellow)
- Pending suspension (red)

<table>
<thead>
<tr>
<th>Status</th>
<th>Age of Def (Days)</th>
<th>Account</th>
<th>Admitted</th>
<th>Discharged</th>
<th>Diagnosis</th>
<th>Document</th>
<th>Patient</th>
<th>Assigned to</th>
<th>Deficiency Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending Suspension</td>
<td>115</td>
<td>50153049236</td>
<td>12/22/05</td>
<td>12/30/05</td>
<td>CONSULTATION</td>
<td>TEST, JOHN</td>
<td>JOHNSON, PAUL</td>
<td>Signature</td>
<td>SIGNATURE</td>
</tr>
<tr>
<td>Incomplete</td>
<td>10</td>
<td>70351506583</td>
<td>04/14/06</td>
<td>04/14/06</td>
<td>PHYSICIAN ORDERS</td>
<td>TEST, JOHN</td>
<td>JOHNSON, PAUL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Incomplete</td>
<td>6</td>
<td>44092999024</td>
<td>02/02/06</td>
<td></td>
<td>PHYSICIAN ORDERS</td>
<td>TEST, JOHN</td>
<td>JOHNSON, PAUL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Incomplete</td>
<td>3</td>
<td>44092999024</td>
<td>02/03/06</td>
<td></td>
<td>PHYSICIAN ORDERS</td>
<td>TEST, JOHN</td>
<td>JOHNSON, PAUL</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Deficiencies, *continued*

**Processing deficiencies**

Deficiencies are organized first by delinquency status, followed by admit date, in reverse chronological order.

You may process each deficiency individually by selecting the record and clicking on the **Process** button.

You may process all deficiencies by selecting the **Process All** button. When you select **Process All**, you will have the opportunity to review each record prior to completing or declining it.

```
process all  process  decline  print  refresh
```
Deficiencies, continued

PIN code entry

When the deficiency is selected, the PIN Entry window will display. Entering your PIN will authenticate your security.

Enter your PIN and click OK.

Warning: Your PIN is considered your legal electronic signature. Please keep it safe and confidential at all times.
Deficiencies, continued

Expanded Document Viewer

When a deficiency is selected to be processed, the **Expanded Document Viewer** window will open and the deficient document will display.
Deficiencies, continued

Expanded Document Viewer buttons

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete</td>
<td>completes the deficiency.</td>
<td></td>
</tr>
<tr>
<td>Skip</td>
<td>skips the current document and goes to the next.</td>
<td></td>
</tr>
<tr>
<td>Decline</td>
<td>declines the deficiency. Note: If you select Decline, you will be prompted to enter a reason for declining the deficiency.</td>
<td></td>
</tr>
<tr>
<td>Close</td>
<td>closes the viewer and returns to the deficiency list.</td>
<td></td>
</tr>
</tbody>
</table>
Deficiencies, continued

Signature deficiencies/transcribed documents

When a Signature Deficiency on a transcribed document is processed, the document is displayed in the viewer. The document should be completely reviewed prior to completing the deficiency.

Hints:
Transcribed documents can be edited prior to completion. See “Signature deficiencies/text editing” on page 1-54.

The Complete button completes the deficiency and adds an electronic signature. Alternately, you can choose Skip, Close or Decline.

Note:
Transcribed documents are not generally available until electronically signed. No one can see the transcribed document unless it has been completed.
Deficiencies, continued

Signature deficiencies/text editing

To make a change to a document, click inside the document at the point of revision and add or change the text as appropriate.

Important: Text editing is allowed on signature deficiencies associated with transcribed documents.

Text editing is allowed on unsigned transcribed documents and saved automatically to the record. Alternately, the deficiency can be declined and an updated dictation can be issued.

Text editing is not allowed on signed documents.

During the text editing process, you can use the following buttons:

<table>
<thead>
<tr>
<th>Button</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cut</td>
<td>Allows you to cut or delete text</td>
</tr>
<tr>
<td>Copy</td>
<td>Allows you to copy text</td>
</tr>
<tr>
<td>Paste</td>
<td>Allows you to paste cut or copied text</td>
</tr>
<tr>
<td>Font</td>
<td>Allows you to change the type of font</td>
</tr>
<tr>
<td>Font size</td>
<td>Allows you to change the font size</td>
</tr>
</tbody>
</table>
Deficiencies, continued

Signature deficiencies/scanned documents

When a Signature Deficiency on a scanned document is processed, the document is displayed in the viewer.

A yellow signature box will be displayed where a signature is missing on the scanned document (e.g. non-signed verbal order.)

**Important:** Scanned documents **cannot** be edited.

The **Complete** button completes the deficiency and adds an electronic signature. Alternately, you can choose **Skip**, **Close** or **Decline**.

**Note:** Scanned documents are generally available even though they have not been electronically signed.
Deficiencies, continued

Dictation deficiencies

When a Dictation Deficiency on a transcribed document is processed, the document is displayed in the viewer.

The **Complete** button completes the deficiency and places it into a queue for HIM review to ensure a transcribed document is completed. Alternately, you can check the selected document and click **Complete** on the Deficiency Worklist.

A signature deficiency will be generated when your dictated report is transcribed.
Deficiencies, continued

Missing text deficiencies

When a Missing Text Deficiency is selected, the scanned document is displayed in the viewer.

The document should be completely reviewed. A yellow box indicating missing text is displayed.

Missing text can be directly added and becomes part of the legal medical record.

The Complete button completes the deficiency and adds an electronic signature. Alternately, you can choose Skip, Close or Decline.
Medical Records

Overview

The Medical Records module allows you to access and view document images in a patient record. The patient is identified by facility and MRN.

You may see documents listed that you are not able to access in the viewer. These documents are in viewing-restricted status for a specified period of time pending review, editing, and approval by the authenticating physician. Documents in view-restricted status are marked with a flag icon on the document tree list. (This only applies to documents with signature deficiencies that are defined as text editable.)
Medical Records, continued

Historical view

Perform a Patient Search to locate a patient.

Result: The patient's demographic information and the documents in the medical record will be displayed.

![Image of historical view of medical records]

The default view for the documents will be by encounter.

**Hints:**

- To view documents from all encounters, click Show All.
- To view documents from specific encounters, select the encounter and click Show Selected.
- To display a list of all the documents included in an individual encounter, click the + sign and the list will expand to display all the documents.
- Select the document link to open and view the document.
Physician of record security

If you are not the physician of record, you will be prompted to enter a reason for your request to access the patient medical record.

Information has Limited Access

Access to this information is limited because of one of the following reasons:

- You are not a Physician of Record, or
- Access has been limited by the administrator

However, you may view this information if you provide a reason. Your name and your reason will be audited.

<table>
<thead>
<tr>
<th>Standard Reasons</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Other Reason</td>
<td></td>
</tr>
</tbody>
</table>

Hospital system limitation allows limited physician association:

- Admitting
- Attending
- Referral
- PCP

Warning: Physician of record overrides are audited to ensure compliance with HIPAA and other regulatory requirements.
Medical Records, continued

Expanded viewer window

The Expanded Viewer window will open and the first document in the record will display.

Note: All patients will have a facesheet and it will be the first document in the viewer.
The name of the document appears at the top of the document.

The navigational buttons on the top of the viewer are used to navigate through the pages.
Medical Records, continued

Bookview display

If you want to view the documents side-by-side, select Bookview on the menu bar and click Display.

As you navigate through the patient's record, the documents will display two per page.

Click the Close button to return to the Medical Records module.