

healow

HEALOW INSIGHTS - PRISMA SETUP AND USER GUIDE

April 2021



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Patient Safety Features

No Patient Safety, Security, or Compliance-Related Updates _____ 7

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ABOUT THIS GUIDE

This document provides information on the Patient Record Information Search Module Aggregator (PRISMA). This product provides users the ability to search and view data within the external records retrieved from the Interoperability Hub (iHub) and the internal documented Progress Notes in the EMR.

For more information, refer to the topics:

- [Product Documentation](#)
- [Getting Support](#)
- [Conventions](#)

Product Documentation

Some healow® products and services integrate with the eClinicalWorks Electronic Medical Record (EMR) and Practice Management (PM) software features. eClinicalWorks-related healow documentation is available at:

- my.eclinicalworks.com Customer Portal <https://my.eclinicalworks.com>
 - ◆ click the *Documents and Videos* widget on the Knowledge tab to display the documents available in PDF format

Getting Support

For healow support-related issues, please contact your assigned healow Account Manager.




Conventions

This section lists typographical conventions and describes the icons used to call out additional information and to indicate item keys, new features, and enhancements to the application.

- Typographical conventions:

Bold	Identifies options, keywords, and items in a description.
<i>Italic</i>	Indicates variables, new terms and concepts, foreign words, or emphasis.
Monospace	Identifies examples of specific data values, and messages from the system, or information that you should actually type.

- Icons are used to highlight new features and indicate enhanced features and item keys:

Icon	Description
	Indicates a Patient Safety feature.
	Indicates an item key.
	Points out helpful tips or additional information.

Note: No updates related to Patient Safety, Security, or Compliance were identified in this document during the document review process.

IMPORTANT! Refer to the Safety, Security, and Compliance section on the my.eclinicalworks.com Customer Portal for any current communications related to Patient Safety, Security, or Compliance.

Note to eClinicalWorks Private Cloud/SaaS Users: When accessing the eClinicalWorks application via RDP (Remote Desktop Protocol) as a backup, be advised that Microsoft® Office® applications such as Excel® and Word® will not be supported.

ACTIVATING AND ACCESSING PRISMA

For more information, refer to:

- [Activating PRISMA](#)
- [Accessing PRISMA](#)

Activating PRISMA

PRISMA is linked to the Interoperability Hub (iHub) and can be activated and managed through the Product Activation Interoperability Hub settings.

The CommonWell Health Alliance® or the Carequality® network must be enabled for the PRISMA activation to occur.

For more information, refer to:

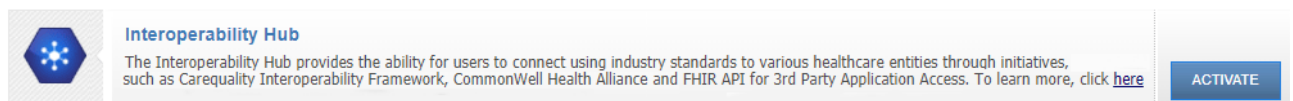
- [Activating PRISMA when the Interoperability Hub is not Activated](#)
- [Activating PRISMA when the Interoperability Hub is Activated](#)
- [Security Settings](#)

Activating PRISMA when the Interoperability Hub is not Activated

Path: *Main Menu > Admin > Product Activation*

To activate PRISMA:

1. From the Product Activation window, find the Interoperability Hub and click *Activate*:



The Active Interoperability window opens.

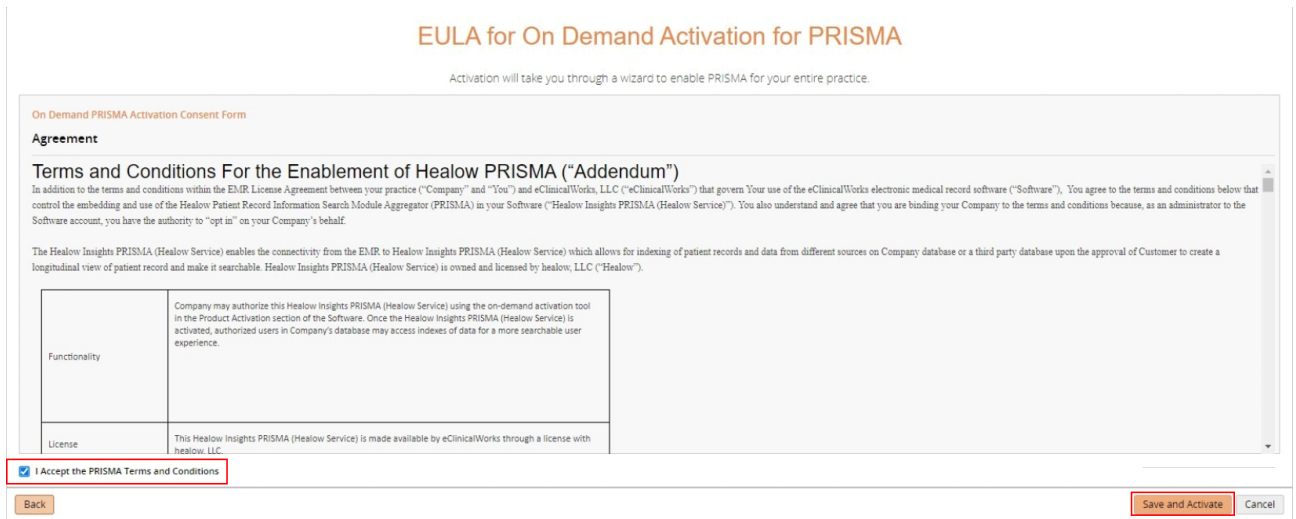
- From the Choose Network tab, select a network or registry:

Note: The CommonWell Health Alliance or the Carequality network must be selected for the PRISMA activation to occur.

- Click the *Save and Next* button.
- From the Terms and Conditions tab, review the network's terms and conditions. Check the *Accept Commonwell Health Alliance Terms* check box to accept the terms:

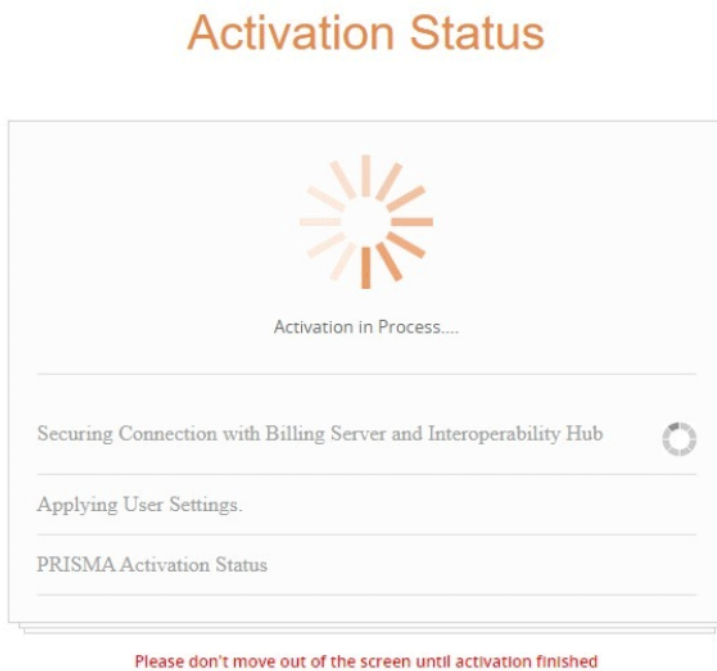
Functionality	Customer desires to connect to the CommonWell Health Alliance.
Fees and Payment	Customer acknowledges that eClinicalWorks reserves the right to charge a maintenance fee at any point after January 1, 2019. Customer will receive a notification 60 days prior to any charges.
	Customer hereby grants its consent to eClinicalWorks to take any and all actions, and to

After accepting the network’s terms and conditions, the PRISMA Terms and Conditions window opens:

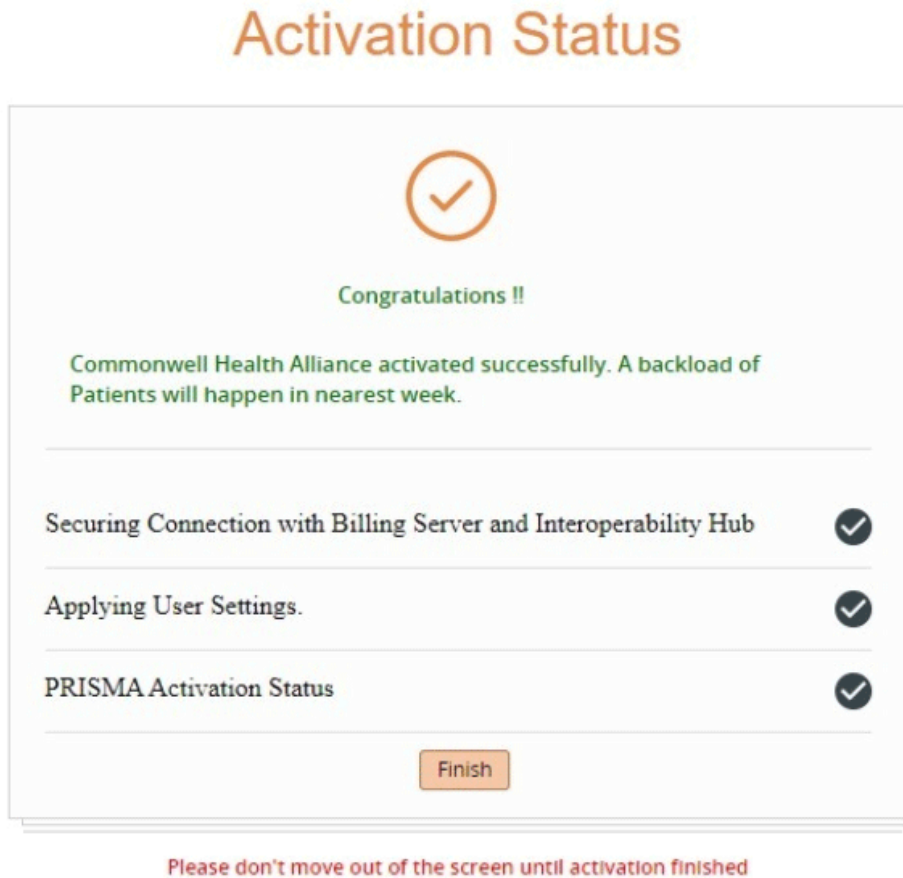


5. Check the *I Accept the PRISMA Terms and Conditions* box and click *Save and Activate*.

The activation process for the Network and PRISMA occurs:



The Network and PRISMA are now activated:



A *Congratulations* message displays.

Activating PRISMA when the Interoperability Hub is Activated

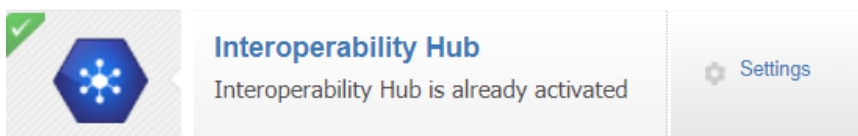
Path: *Main Menu > Admin > Product Activation*

Users can activate PRISMA from Product Activation when the Interoperability hub is already activated.

Note: The CommonWell Health Alliance or the Carequality network must be activated for the PRISMA activation to occur.

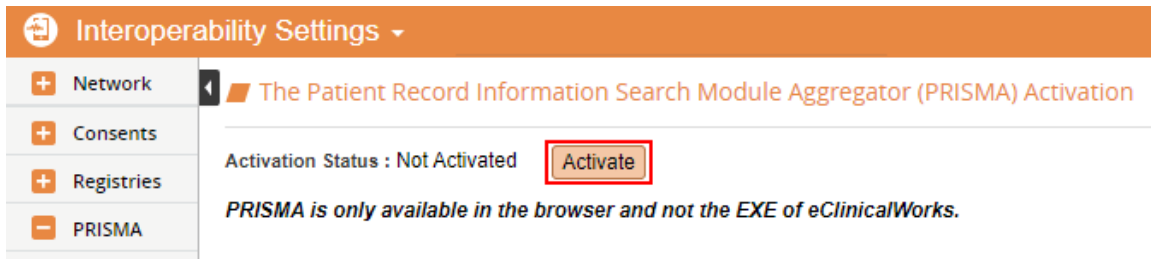
To activate PRISMA with iHub Activated:

1. From the Product Activation window, locate the Interoperability Hub settings and click *Settings*:



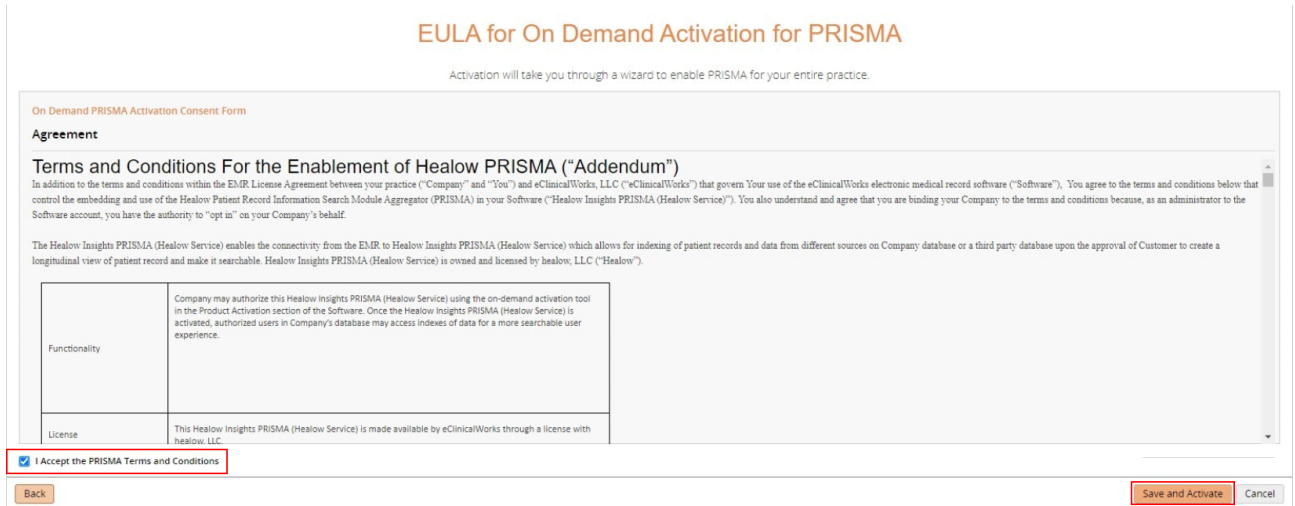
2. Click the *PRISMA* tab.

3. Click the *Activate* button:



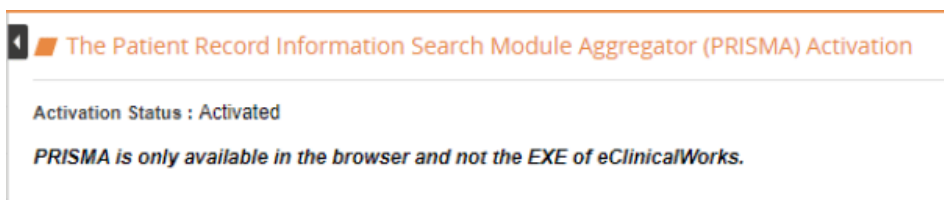
The Terms and Conditions Display.

4. Check the *I Accept the PRISMA Terms and Conditions* box and click *Save and Activate*:

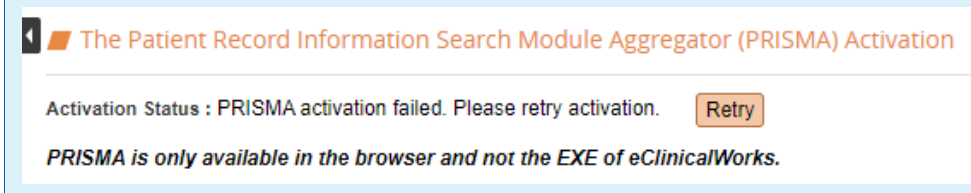


The PRISMA activation attempt occurs.

PRISMA is now activated:



Note: If the activation fails, the user has the ability to retry the activation using the *Retry* button:



Security Settings

Path: *Main Menu > Menu > File > Security Settings*

Users need access to the healow Insights® button on the Interactive Clinical Wizard of the Patient Hub and Progress Notes. From the Security Settings window, activate the *Allow access to healow Insights* security setting for the appropriate users:

– Miscellaneous - 1 item(s)

Security Item Name	Security Item Desc	Security Group Name
Allow access to healow Insights	Allows access to healow Insights product Uncheck the permission check box to restrict access to healow Insights window Check the permission to grant access to healow Insights window	Miscellaneous

Note: All users have access to the healow Insights button by default.

For more information about accessing PRISMA, refer to [Accessing PRISMA](#).

Accessing PRISMA

PRISMA can be accessed from the Interactive Clinical Wizard or the healow Insights button. The Patient Hub and Progress Notes are two options that offer access to PRISMA for the user.

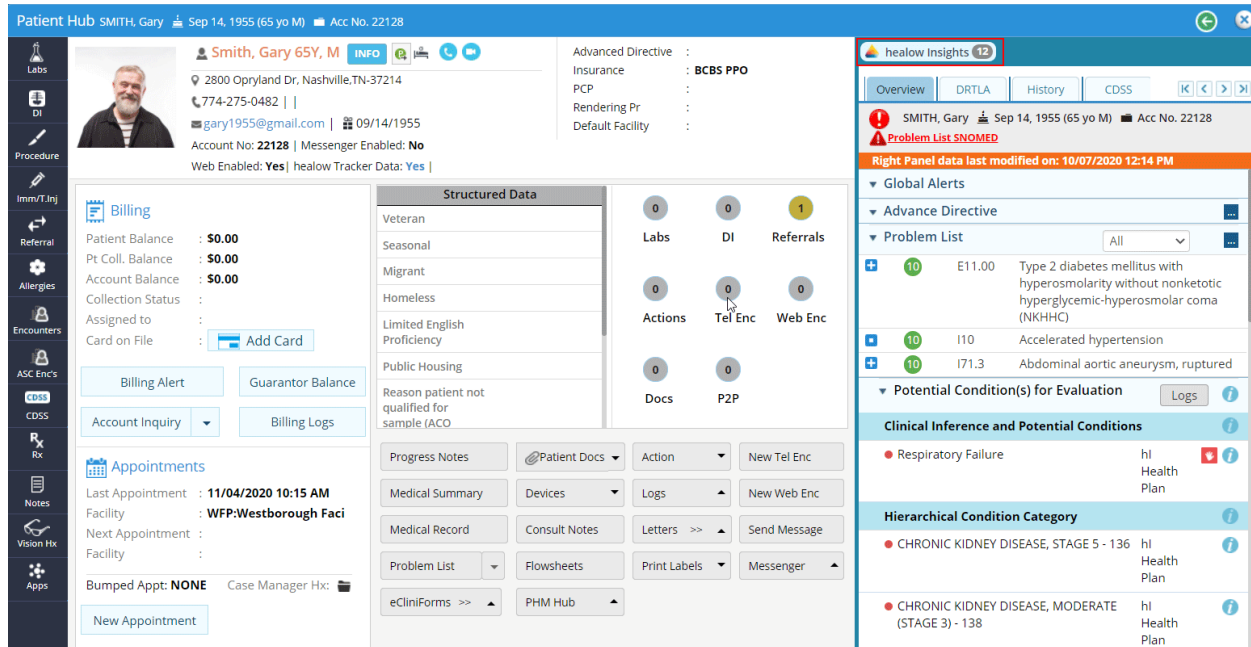
For more information, refer to:

- [Accessing through the Patient Hub](#)
- [Accessing through the Progress Notes](#)
- [Using the healow Insights Button](#)

Accessing through the Patient Hub

Path: *Patient Hub > Interactive Clinical Wizard > healow Insights button*

Access PRISMA using the healow Insights button, as displayed on the Interactive Clinical Wizard in the Patient Hub:

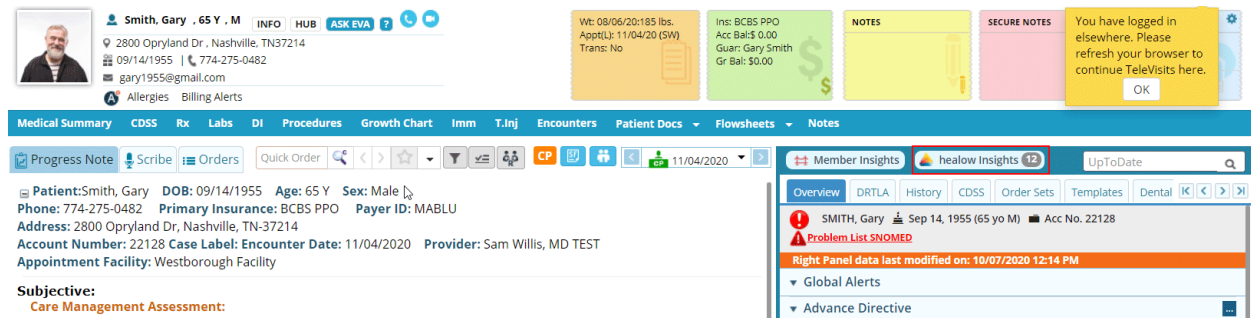


If the healow Insights button is not present, refer to [Activating PRISMA](#).

Accessing through the Progress Notes

Path: *Progress Notes > Interactive Clinical Wizard > healow Insights button*

Access PRISMA using the healow Insights button, displayed on the Interactive Clinical Wizard in the Progress Notes:



If the healow Insights button is not present, refer to [Activating PRISMA](#).

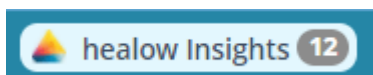
Using the healow Insights Button

Path: *Patient Hub > Interactive Clinical Wizard > healow Insights button*

Path: *Progress Notes > Interactive Clinical Wizard > healow Insights button*

The healow Insights button displays on the Interactive Clinical Wizard. The numerical count that displays on the button represents the summation of external and internal records for the patient.

Click the *healow Insights* button to launch the healow Insights - PRISMA:



Note: The number of records that display within the healow Insights product could be less than what displays on the healow Insights button. This is due to potential parsing or indexing failure of records. These failed records display under the healow Insights Warning icon next to the PRISMA search field on the healow Insights window.

For more information on failed records, refer to [healow Insights Warnings](#).

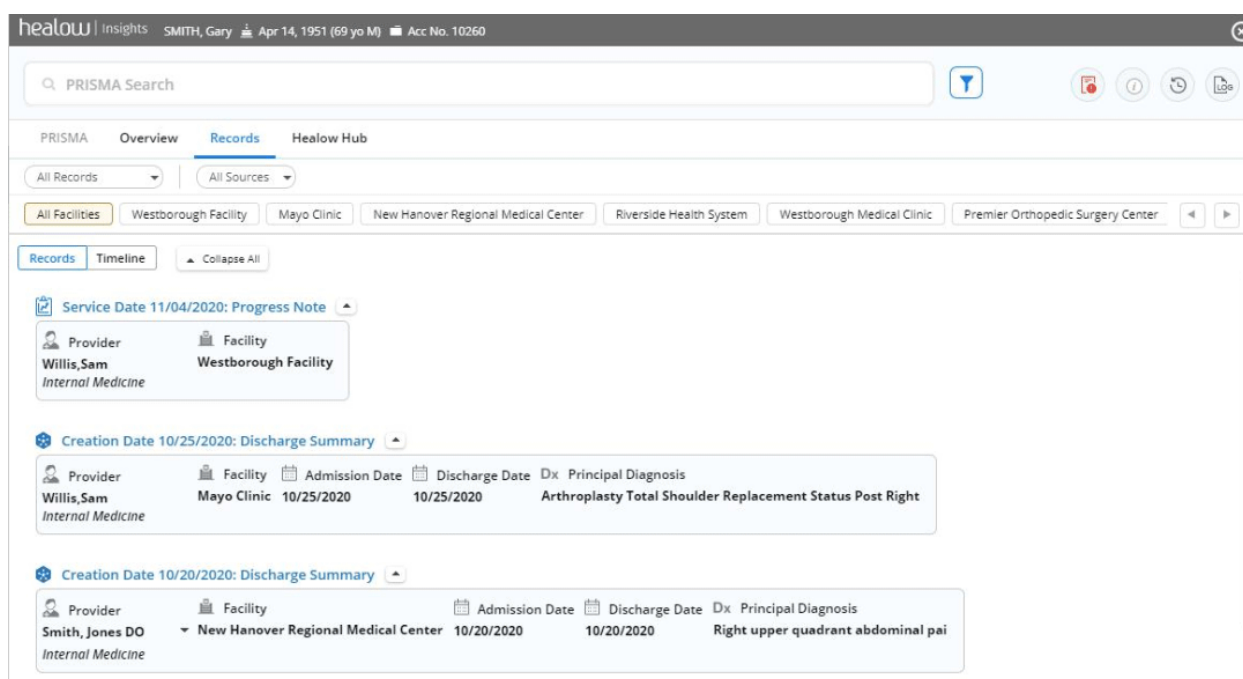
HEALOW INSIGHTS WINDOW

Path: Patient Hub > Interactive Clinical Wizard > healow Insights button

Path: Progress Notes > Interactive Clinical Wizard > healow Insights button

The healow Insights window displays four tabs: *PRISMA*, *Overview*, *Records*, and *Healow Hub*.

These four tabs enable users to view a patient's internal records, external records, clinical data, and metric tracking information. It also provides the user with the ability to search for keywords that display within records:



Note: If the patient is not Web enabled, the healow Hub tab will not display.

For more information, refer to:

- [healow Insights Icons](#)
- [Records Tab](#)
- [Overview Tab](#)
- [healow Hub Tab](#)
- [PRISMA Tab](#)

healow Insights Icons

Path: *Patient Hub > Interactive Clinical Wizard > healow Insights button*

Path: *Progress Notes > Interactive Clinical Wizard > healow Insights button*

The healow Insights icons display at the top right of the window. These enable users to view healow Insights warnings, disclaimers, when the window was last refreshed, and the access logs:



For more information, refer to:

- [healow Insights Warnings](#)
- [healow Insights Disclaimers](#)
- [Window Last Refreshed](#)
- [Access Logs](#)
- [Using the PRISMA Search Field](#)

healow Insights Warnings

Path: *Patient Hub > Interactive Clinical Wizard > healow Insights button*

Path: *Progress Notes > Interactive Clinical Wizard > healow Insights button*

This icon displays if a record or records fail to parse or index:

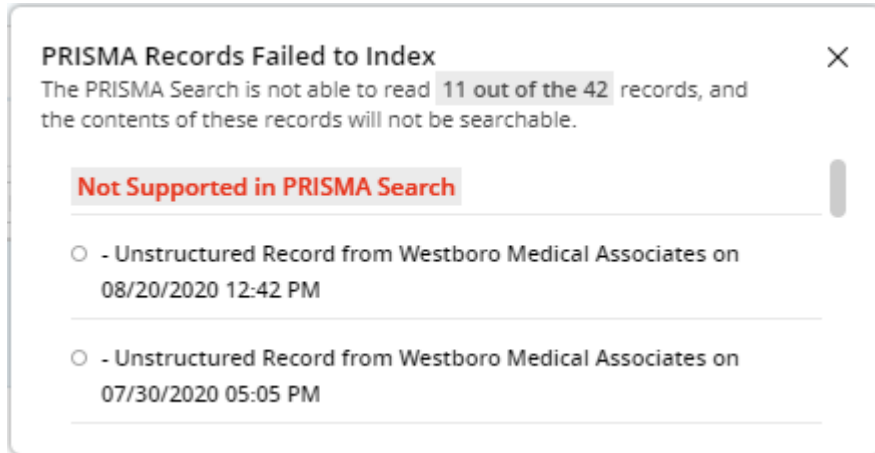


- Parsing is the process of making a copy of the record within healow Insights.
- Indexing is the process of making the copied record searchable.

This pop-up list displays three buckets of records which failed to parse or index:

- **Not Supported in PRISMA Search** - This bucket displays records that are images and cannot be searched by PRISMA.
- **Not Searchable in PRISMA Search** - An actual structured record that was retrieved and parsed correctly, but the record failed to index. The record can be viewed in the *Records* tab but is not searched in the *PRISMA* tab. The pop-up enables records to be re-indexed by clicking the refresh icon.

- **Not Supported in healow Insights** - These are external records that failed to parse and index in PRISMA. The external records were still retrieved by iHub, but these records cannot be viewed or searched within healow Insights - PRISMA.

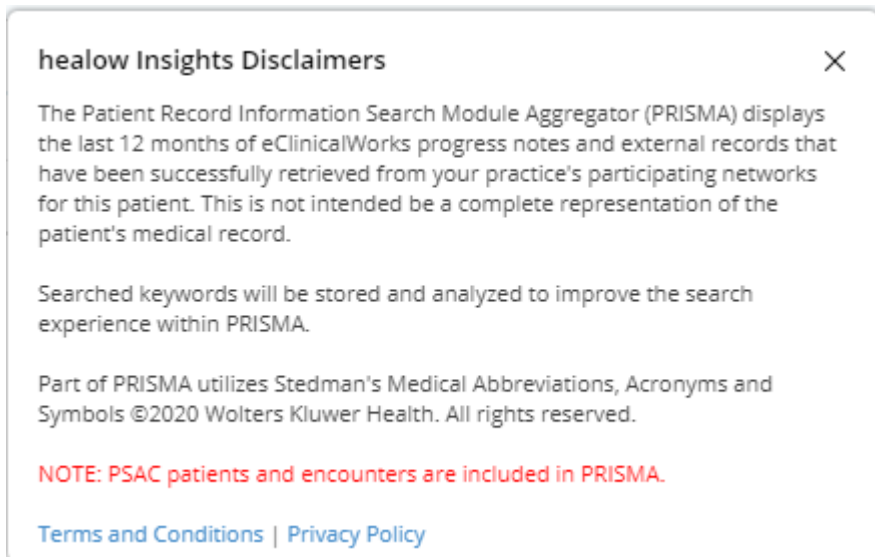


healow Insights Disclaimers

Path: *Patient Hub > Interactive Clinical Wizard > healow Insights button*

Path: *Progress Notes > Interactive Clinical Wizard > healow Insights button*

When this icon is selected, the *healow Insights Disclaimers* pane displays:

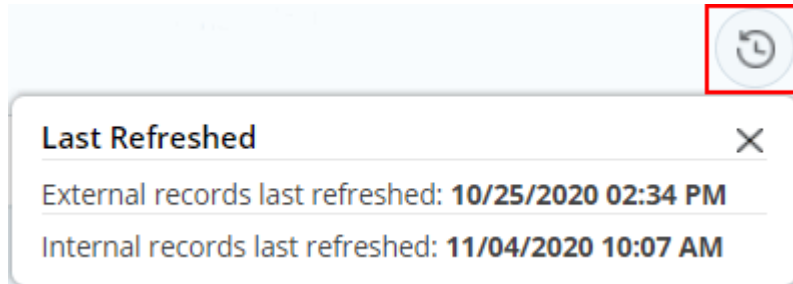


Window Last Refreshed

Path: Patient Hub > Interactive Clinical Wizard > healow Insights button

Path: Progress Notes > Interactive Clinical Wizard > healow Insights button

This refresh icon enables users to view when the internal and external records were last updated:



Access Logs

Path: Patient Hub > Interactive Clinical Wizard > healow Insights button

Path: Progress Notes > Interactive Clinical Wizard > healow Insights button

This icon enables users to view the logs for the window and each tab used:

Date & Time	User Name	Section	Action	Details
2020-11-06 09:08:14	Willis,Sam	Prisma	Viewed	
2020-11-06 09:08:06	Willis,Sam	Overview	Viewed	
2020-11-06 09:05:59	Willis,Sam	Records	Viewed	
2020-11-05 14:52:58	Willis,Sam	Prisma	Viewed	
2020-11-05 14:51:11	Willis,Sam	Records	Viewed	
2020-11-05 12:31:33	Willis,Sam	Records	Viewed	
2020-11-05 12:30:35	Willis,Sam	Records	Viewed	
2020-11-05 03:56:18	Willis,Drsam	Records	Viewed	
2020-11-05 03:56:10	Willis,Drsam	Prisma	Viewed	

Total Results: 554 Prev Page 1 of 28 Next Results Per Page 20 Print Close

Note: The *Action* column displays the statuses as *Viewed* or *Imported*:

- **Viewed** - Displays when a particular tab is accessed with healow Insights - PRISMA
- **Imported** - Displays when external records are imported into patient documents

Records Tab

Path: *Patient Hub > Interactive Clinical Wizard > healow Insights button > Records tab*

Path: *Progress Notes > Interactive Clinical Wizard > healow Insights button > Records tab*

The *Records* tab displays a list of all records, from most recent to the most outstanding, for users to view. Records are broken down into external and internal records:

- External Records are records that are retrieved through the interoperability network that was chosen by the practice.
- Internal Records are specific encounter types that are Progress Notes to be brought into PRISMA. These include telephone encounters, any Progress Notes type, OB Flowsheets, Web encounters, CCMR encounters, CCMR Virtual encounters, and ASC encounters.

Note: Records are from the CommonWell Health Alliance® and Carequality® network only and not from the FHIR network.



When a record is selected, the tab displays a split screen view with the list of records on one side and the details of the selected record on the other:

The screenshot shows the healow Insights PRISMA interface. At the top, there is a search bar labeled 'PRISMA Search' and navigation tabs for 'PRISMA', 'Overview', 'Records', and 'Healow Hub'. Below the search bar, there are filters for 'All Records' and 'All Sources', and a list of facilities including 'Westborough Facility', 'Mayo Clinic', 'New Hanover Regional Medical Center', 'Riverside Health System', and 'Premier Orthopedic Surgery Center'. The 'Records' tab is active, showing a list of records with columns for 'Service Date' and 'Action'. The selected record is 'Service Date 11/04/2020: Progress Note'. The details view for this record shows the following information:

- Case Label:** Date Of Injury
- Patient:** Smith, Gary
- DOB:** 09/14/1955 **Age:** 65 Y **Sex:** Male
- Provider:** Sam Willis, MD TEST
- Date:** 11/04/2020
- Current Medications:** Taking Metformin HCl 500 MG Tablet 1 tablet with a meal Orally Once a day, Lisinopril 10 MG Tablet 1 tablet Orally Once a day, Amoxicillin 400 MG/5ML Suspension Reconstituted as directed Orally
- Care Plan Details:** (Handwritten signature)
- Electronically signed by:** Sam Willis, MD on 11/06/2020 at 01:49 PM EST
- Sign off status:** Pending
- Provider:** Sam Willis, MD TEST
- Date:** 11/04/2020



At the bottom of the interface, there is a footer that reads 'Note generated by eClinicalWorks EMR/PM Software (www.eClinicalWorks.com)'. The bottom navigation bar shows 'Results: 12', 'Prev', 'Page 1 of 2', and 'Next'.





The following table provides more information on the left pane view of the Records tab:


Feature	Description
<p>Icons</p>	<p>An icon displays next to each record that indicates whether the record is an internal or external record:</p> <div style="display: flex; flex-direction: column; align-items: center;"> <div style="display: flex; align-items: center; margin-bottom: 10px;">  - Internal </div> <div style="display: flex; align-items: center;">  - External </div> </div>
<p>All Records Drop-Down</p>	<p>Enables users to filter all records by selecting the following options:</p> <ul style="list-style-type: none"> ■ All Records ■ Last Seen By Me (with the date of the last appointment) ■ Last 3 Months ■ Last 6 Months <div style="border: 1px solid #ccc; border-radius: 5px; padding: 5px; margin-bottom: 5px;"> All Records ▾ </div> <div style="border: 1px solid #ccc; border-radius: 5px; padding: 5px; margin-bottom: 5px;"> All Records </div> <div style="border: 1px solid #ccc; border-radius: 5px; padding: 5px; margin-bottom: 5px;"> Last Seen By Me (08/04/2020) </div> <div style="border: 1px solid #ccc; border-radius: 5px; padding: 5px; margin-bottom: 5px;"> Last 3 Months </div> <div style="border: 1px solid #ccc; border-radius: 5px; padding: 5px;"> Last 6 Months </div> <p>Note: The <i>Last Seen By Me</i> filter is seen only by a provider with login credentials.</p>
<p>All Sources Drop-Down</p>	<p>Enables users to filter all records by selecting the following options:</p> <ul style="list-style-type: none"> ■ All Sources ■ External Records ■ Internal Records <div style="border: 1px solid #ccc; border-radius: 5px; padding: 5px; margin-bottom: 5px;"> All Sources ▾ </div> <div style="border: 1px solid #ccc; border-radius: 5px; padding: 5px; margin-bottom: 5px;"> All Sources </div> <div style="border: 1px solid #ccc; border-radius: 5px; padding: 5px; margin-bottom: 5px;"> External Records </div> <div style="border: 1px solid #ccc; border-radius: 5px; padding: 5px;"> Internal Records </div>
<p>Filters</p>	<p>The row of facility filters displays all locations the patient has been seen by a provider.</p> <p>Select a location to filter the patient’s charts by that location or click <i>All Facilities</i> to filter and display the patient’s charts.</p>

Feature	Description
Records	Displays a list of internal and external records. This list displays records by the service date for external and internal records. Click the arrow icon next to the record to display an expanded view of the record.
	Note: The creation date displays only for external records if there is no specific service date for the record.
Timeline	Displays a timeline view of the internal and external records.
Expand All	<p>Click this button to expand the list view of the records to display the metadata of all the records.</p> <p>The external records metadata includes:</p> <ul style="list-style-type: none"> ■ Provider ■ Facility ■ Admission Date ■ Discharge Date ■ Primary Diagnosis <p>The internal records metadata includes:</p> <ul style="list-style-type: none"> ■ Provider ■ Facility ■ Reason for Visit ■ Primary Diagnosis <p>Click the <i>Expand All</i> button again to collapse the records to list view.</p>

The following table provides more information on the features that display on the right pane view of the records tab:

Feature	Description
Jump To Arrow Icon 	Enables users to go back to the selected record in the list of records. For example, when a record is selected in the list, the selected record displays on the right side of the split window. If the user scrolls to different pages of the list of records on the left view, the user can click this icon to bring them back to the selected record in the left view of the split window.
Import icon 	Imports the patient’s record into Patient Documents.
	Note: This button displays for external records only.

Feature	Description
Double Arrow icon 	Expands the records to a full view window.
Previous and Next Arrow icons 	Navigate to the previous or next record displayed in the record list using this button.
Jump To Keyword 	Enables users to jump to different keywords within the records.
Jump To Button 	Enables users to jump to different sections of the record. When this button is clicked, a list of sections that a user can jump to displays. This enables the user to select a section and be brought directly to that section. <i>e.g., Vitals, Allergies, Social History, etc.</i>

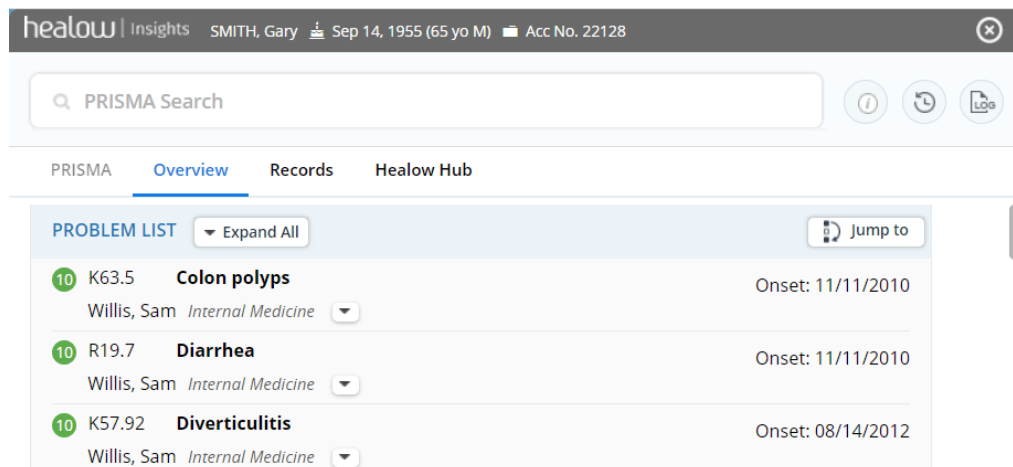
 Each button and icon displays a tool tip when hovered over.

Overview Tab

Path: *Patient Hub > Interactive Clinical Wizard > healow Insights button > Overview tab*

Path: *Progress Notes > Interactive Clinical Wizard > healow Insights button > Overview tab*

The Overview tab displays the Problem List, Medications, Allergies, Immunizations, and Care Team categories for the patient. The Care Team category is PRISMA specific and retrieves data from the provider who wrote the external records:



The screenshot shows the healow Insights interface for a patient named SMITH, Gary, born Sep 14, 1955 (65 yo M), with Acc No. 22128. The PRISMA Search bar is visible. The navigation tabs include PRISMA, Overview (selected), Records, and Healow Hub. The main content area displays a 'PROBLEM LIST' with an 'Expand All' dropdown and a 'Jump to' button. The list contains three items:

- K63.5 Colon polyps** (Onset: 11/11/2010) by Willis, Sam, Internal Medicine
- R19.7 Diarrhea** (Onset: 11/11/2010) by Willis, Sam, Internal Medicine
- K57.92 Diverticulitis** (Onset: 08/14/2012) by Willis, Sam, Internal Medicine

Note: The Problem List, Medications, Allergies, and Immunizations also display on the Interactive Clinical Wizard on the eHX tab.

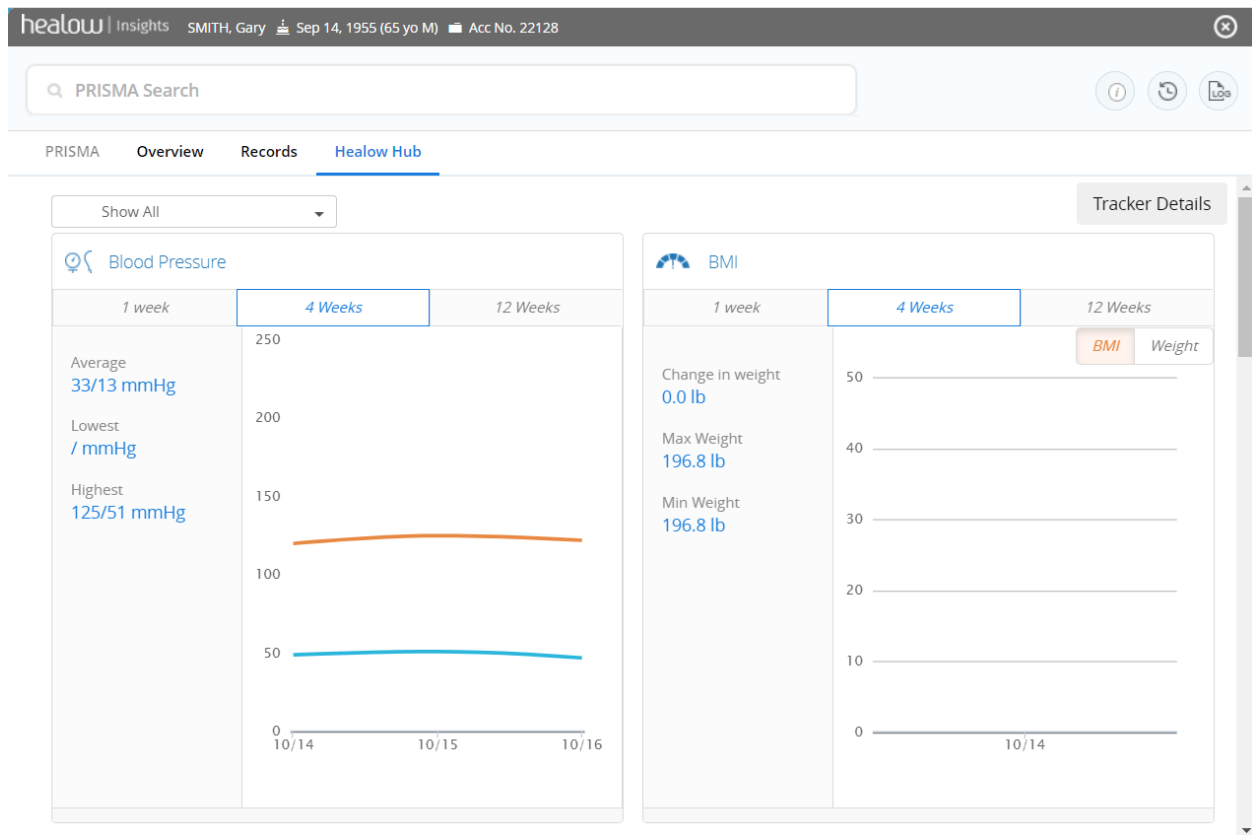
For more information on the *Expand All* and *Jump To* Button, refer to [Records Tab](#).

healow Hub Tab

Path: *Patient Hub* > *Interactive Clinical Wizard* > *healow Insights* button > *healow tab*

Path: *Progress Notes* > *Interactive Clinical Wizard* > *healow Insights* button > *healow tab*

The healow Hub tab displays the *My Tracker* view and only displays if a patient is Web enabled. The *My Tracker* view enables end users to view metrics that the patient is recording by using trackers, e.g., heart monitors, BMI, blood pressure, etc.:



Note: Users can also access this window from *Progress Notes* > *healow Sticky Note* > *Lightning Bolt* icon.

For more information on the *My Tracker* view, please refer to the *healow CHECK-IN User Guide*.

PRISMA Tab

Path: Patient Hub > Interactive Clinical Wizard > healow Insights button > PRISMA search field

Path: Progress Notes > Interactive Clinical Wizard > healow Insights button > PRISMA search field

The PRISMA search field enables end users to search for keywords within the content of the internal and external records retrieved:

The screenshot shows the healow Insights interface. At the top, the user is identified as SMITH, Gary, with a birth date of Sep 14, 1955 (65 yo M) and account number 22128. The search bar contains the text 'abd' and is highlighted with a red box. Below the search bar, there are tabs for 'PRISMA', 'Overview', 'Records', and 'Healow Hub'. The 'PRISMA' tab is active, showing search results for 'abd'. The results include two progress notes with highlighted keywords like 'Abdominal' and 'ABDOMEN'.

This field currently finds keywords from structured external records or data that is entered in the blue hyperlink sections of the Progress Notes from internal records.

Note: The PRISMA search field can also identify keywords in the unstructured external records that have documented text and are PDF files.

Note: The PRISMA search field displays only keyword results based on records retrieved. The PRISMA search field does not display results of the Overview or healow Hub tabs.

For more information, refer to [Using the PRISMA Search Field](#).

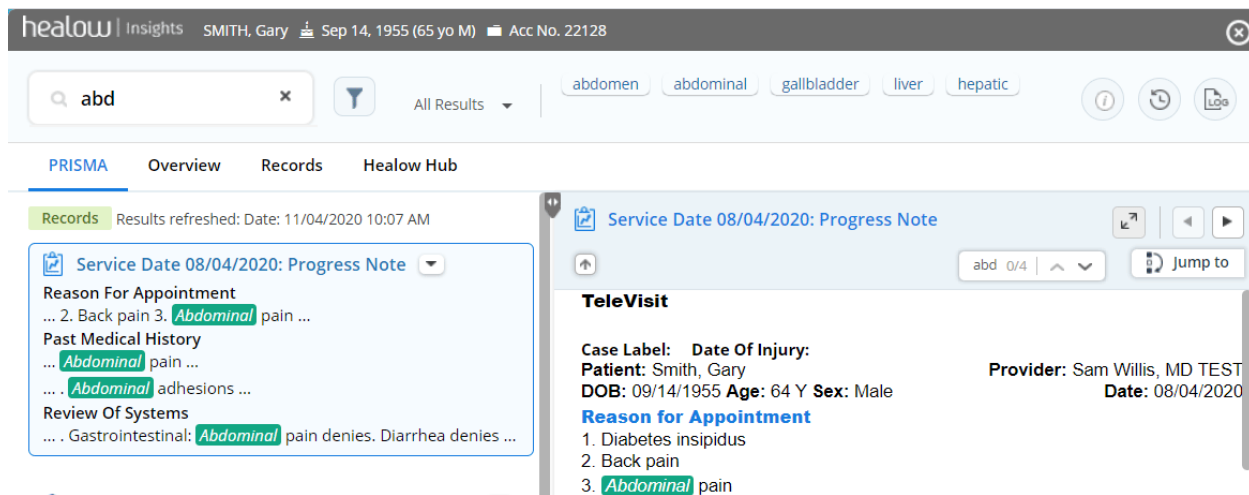
Using the PRISMA Search Field

Path: Patient Hub > Interactive Clinical Wizard > healow Insights button > PRISMA search field

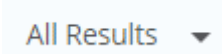
Path: Progress Notes > Interactive Clinical Wizard > healow Insights button > PRISMA search field

When a user enters a keyword in the PRISMA search field, a list of all internal and external records from most recent to most outstanding with that keyword displays to the user. If the keyword for which you searched for is found within the content of the resulting records, the matching keyword is highlighted in green and is made selectable to the user.

When a record is selected, the split screen window launches and the details of the selected records display on the right side of the window:



The following table provides more information on the PRISMA tab:

Feature	Description
<p>All Results drop-down</p> 	<p>Enables users to filter by keyword results. The drop-down automatically selects <i>All Results</i> as the search type:</p> <ul style="list-style-type: none"> ■ All Results - Enables users to search for records by using abbreviations, acronyms, full words, misspellings, and keywords. ■ Verbatim - A strict search that only displays exactly what is typed into the search field. This does not accommodate abbreviations, acronyms, or misspellings. ■ Section - Enables users to search for records by section name or the blue hyperlink in a set of Progress Notes.
<p>Selectable Keyword</p>	<p>When a keyword is searched for in the PRISMA search field, the matching keyword in the results becomes selectable and is highlighted in green. Select the word to open the record specifically where that keyword is used.</p>

For more information on other icons found in this tab, refer to the [Records Tab](#).

APPENDIX A: NOTICES

The following sections list the [Trademarks](#) contained in this system.

Trademarks

eClinicalWorks®

healow®

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