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Getting Started

In this chapter, you will learn to do the following:

- Log in to the system
- Create or change your password
- Set or change your security questions
- Recover a forgotten password
- Navigate the CareAlign user interface
- Search for a patient

Log in

1. Navigate to your CareAlign website and enter your Username and Password.

   Your username and temporary password will be sent to your personal email address. Although your login page may not look identical to the one above, your sign-in interface will look and function in the same way.

2. You will see the CareAlign home view.
Create or Change Your Password

There are three ways to arrive at the Change Password screen:

- The first time you log in to CareAlign, you will be prompted to change your password before you are sent to the home view.
- When your password expires, you will be directed to the screen automatically. You must change your password every 90 days.
- To reset your password at any time, use the side navigation to go to Tools > Change Password.

1. In the Current Password field, enter your current password. If this is your first time in CareAlign, enter the temporary password you were given. In the New Password and Confirm Password fields, enter the new password you would like to use. These two fields must match.

2. Ensure that your new password meets the following requirements, also shown above in yellow:
   - **Length**: Must be at least seven (7) characters long.
   - **Characters**: Must contain characters from three (3) of the following four (4) classes:
     - Uppercase Characters: (A, B, C, D, ... Z)
     - Lowercase Characters: (a, b, c, d, ... z)
     - Numbers (1, 2, 3, 4, ... 9)
     - Non-Alphanumeric Characters, such as punctuation symbols
   - **Uniqueness**: This password has recently been used for this account. Please choose a new password.
   - **Username**: Cannot contain your username.
   - **Partial Name**: Cannot contain any part of your full name.
   - **Dictionary**: Cannot be solely based on a word in the dictionary (weak).
3. Click **Change**. If your new password meets the requirements, you will see that your password was changed successfully.

4. If your password does not meet the requirements, that requirement will turn red. Enter a new password into the **New Password** and **Confirm Password** fields and try again. If your passwords match, you will see a green check.

保密

Clients have the option to customize their own password requirements and determine how often users must change their password.

Set or Change Your Security Questions

You are required to answer one of three security questions when you log in from an unsecured location (if you use Trusted Networks), and you are required to answer all three security questions in order to recover your password. There are two ways to set your security questions:
- The first time you log in to CareAlign, you will be prompted to select and provide answers to three security questions.
- You can reset your security questions at any time by going to **Tools > Security Questions** in the side navigation.

1. Follow the prompts to select three security questions from the drop-down menu and enter your answers.

2. Click **Submit**.
Recover your Password

1. Click **Forgot your password?** on the login screen.

💡 You can recover your password at any time unless your account has been locked. After 5 attempts, your account will be **Locked**. To unlock your account, call your designated Help Desk to reset your password.

2. Enter your username and click **Continue**.

3. Answer your security questions and click **Continue**.

4. Enter your New Password, being sure to meet the designated **password requirements**. Enter your new password again in the **Confirm Password** field. Click **Continue** to return to the login screen.
Navigate CareAlign
When you log in to CareAlign you will see the home screen, which has persistent (A) top, (B) tab, and (C) side navigation.

![CareAlign Home Screen]

**Top Navigation**

A. **Vault selection**: Vaults are used to separate participants within a healthcare information exchange. Choose the vault you would like to work in from the drop-down menu, which lists all vaults you have permission to access.

B. **User information**: Identify the user currently logged in to the system (name and email address).

C. **Help**: Access online help (this document).

D. **Clear**: Clear protected health information (PHI) from the screen.

E. **Lock**: Lock your account and keep clinical information on the screen until you log back in.

F. **Log Out**: Log out and save.

💡 *Each user must have access to at least one vault. If the user has access to multiple vaults, there must be one default vault.*

*The user’s secure messaging mailbox will be tied to the default vault, and the default vault will be automatically selected each time the user logs in to CareAlign.*
Side Navigation

Menu

A. **Message Notifications**: View your number of unread/total and urgent messages.
B. **Community Search**: Select this tab to conduct a Community Search for a patient.
C. **Quick Search**: Conduct a Quick Search for a patient.
D. **Patient Lists**: View and manage inpatient, outpatient, and other lists.
E. **Secure Messaging**: Access and use your secure messaging mailbox.
F. **Links**: Add and view links to online resources that you use often.
G. **Customize**: Adjust settings to create a customized CareAlign experience.
H. **Tools**: Use administrative and account access tools.

Search

Tabs

Tabs display information when you make a selection from the side navigation. For example, the MG, or Secure Messaging, tab will populate once you select Secure Messaging. Information remains in the tabs until you **Clear** or **Log Out** of your session.

A. **PL (Patient Lists)**: Displays Search results or Patient Lists.
B. **PC (Patient Chart)**: Displays a Patient Chart you have chosen from Search results or a Patient List.
C. **MG (Secure Messaging Inbox)**: Displays your Secure Messaging mailbox.
D. **ADM (Administration)**: Displays tools accessed by clicking Tools, Links, or Customize.
Search for a Patient

Conduct a Quick Search
Quick Search is the fastest way to find a patient who has data in the vault where you perform the search. If a patient only has data in other vaults, Quick Search will not find that patient. If you know the patient has been seen by a provider in your vault, use Quick Search first. If the patient has not been seen in your vault, use Community Search.

1. Select a vault using the drop-down menu in the top navigation.

2. Select **Menu** in the side navigation. Enter a patient's First or Last Name (try to use the complete name); Social Security Number; or Medical Record Number in the space provided and click Search.

3. Results will display in the PL tab. Using a partial name will return patients whose last names begin with the letters provided. Click a patient's MRN to open that patient's chart in the PC tab.

4. Use the patient's full name if possible. The broader the search, the longer it can take to return results and find the patient you are looking for. If there is one result for the search, that patient's chart will automatically display in the PC tab.
5. After reviewing the search results, click a patient's name to reveal the patient list actions bar. From here, you can add the patient to a patient list or take other actions.

![Patient List Actions Bar](image)

💡 The patient list actions bar is customizable. Add or subtract actions by going to Customize > Actions.

**Conduct a Community Search**

Community Search allows you to search across all vaults you are authorized to access.

1. Click **Search** in the side navigation if it is not selected. Enter the patient’s MRN; full or partial Last Name and/or First Name; Social Security Number; Date of Birth; and/or Sex. Click **Search**.

![Community Search](image)

💡 You must enter a First & Last Name, MRN, or SSN (i.e., you cannot enter only a first or last name).
2. Results will display in the PL tab, including the location of the patient information (e.g., which vault it is in). Check the boxes next to patient information you want to view, and click **View Selected Charts** to open those charts in the PC tab.

![Community Search](image)

⚠️ Provide as much information as possible to improve your results. The more information you include, the easier it will be to find the patient you are looking for.

**eHealth Exchange**

If your application is configured with access to eHealth Exchange (eHX) communities, you will see a drop-down menu that allows you to search these communities. This drop-down menu will always default to CareExchange. However, if a patient is found when querying an eHX community, the system will also search for and display any patient information from CareAlign and/or CareExchange.

![Extended Search](image)

⚠️ Note that you will only see the community drop-down menu if **eHX communities are configured by ICA**.

**XCA Targeted Query**

If additional XCA Gateways (i.e., XCA Gateways that are not CareExchange or eHX) are configured for your system, you will have the ability to search these communities once they are created. If you include additional communities in a search, that information will be visible in the transaction log but will not be included in Audit Trail Sessions or Events.
**Review Patient Matches**

During a search, Patient Matching (PARMA) runs in the background to identify patients who may have assured or potential matches. Patient Data items are weighed and scored to identify qualifying matches, and scores are assigned based on these values.

Potential matches appear in search results underneath assured matches, and indicate that a patient may have been duplicated, or listed separately, in different vaults.

1. Check the boxes next to any potential matches you would like to view. (Assured matches should already be checked.)

![Community Search](image)

2. Click **View Selected Charts** to view the selected charts in the PC tab.

![View Selected Charts](image)

3. The **Patient Chart** will display and show how many aliases are currently represented in the patient chart (1) and how many total aliases there are for the patient (2). Click the number of aliases to return to the list of potential matches.

![Patient Chart](image)
Conduct an Extended Search

If your initial search returns no results or you believe records may exist outside of your community, perform an **Extended Search**. This allows you to search for patients who only have information in CareExchange.

1. In **Community Search**, check **Extended Search**. Patient matching in Extended Search is 100% deterministic, meaning you must **exactly** match all four required data items: the patient’s full First and Last names, Date of Birth (mm-dd-yyyy), and Sex.

2. Enter required information and any **Optional Demographics** (City, Zip, Phone, Email) and click **Search**.
3. You will see search results that include the patients MRN, Last Name, First Name, Sex, SSN, DOB, and Location. Check the applicable boxes for the charts you want to view, and click **View Selected Charts**.

![Search Results](image)

### Accessing, Reviewing, and Updating Patient Chart Information

The patient chart is where you will find all available patient records and information. In this chapter, you will learn to do the following:

- Access and Understand a Patient Chart
- Access Clinical Results
- View Patient History
- View and Update Patient Summaries
- Search Within a Patient Chart
- Perform Additional Actions

#### Access a Patient Chart

1. Perform a **Quick Search** or **Community Search** to locate the patient. Click his or her Medical Record Number (MRN) or Patient Name (depending on the type of search) to open the patient’s chart.

![Patient Chart](image)

2. You will see the Patient Chart home view, which displays in the PC tab.
Patient Information

Patient information displays at the top of the Patient Chart home view. The appearance of a patient’s chart will vary based on the information available and security flags or patient indicators applied as well as the user’s level of data access. Some patient charts will display minimal information, as shown below.

Other patient charts may include several indicators that relay different types of information.

If you are a user with Standard Data Access and a patient’s data has been secured or Globally Opted Out, you will see the Patient Icon with a red line through the instances that are secured, as shown in the second image above. You may click Aliases to view the other icons that are secured.

If a user with no GOO vault access performs an Extended Search for an Opted-Out patient who only has data in CareExchange, that search will return “0 results were found.”
A. **Patient Icon:** Click the Patient Icon to display available patient demographics:

![Image of Patient Information](image)

B. **Aliases:** The Aliases indicator will appear if a patient has information in multiple vaults, if you choose to show potential matches in a Patient Chart, or if the patient has multiple MRNs in the same vault. Click the number in the white box to select the patient information you want to view. The gray box indicates how many aliases you are currently viewing.

C. **Medical Record Number (MRN):** An MRN is a unique identifier assigned by a doctor or hospital and used to identify an individual’s medical record from that care site.

D. **Patient Name**

E. **Primary Care Provider (PCP):** The patient’s PCP will appear if available.

F. **Security Flags:** Security flags appear when a patient, patient account, or document has been secured, either manually by an administrator or through integration into the system. See Patient Data Sharing and Security Groups for more information on securing patient information and creating new security flags.
   - The **HIE Sharing Refused** flag displays when the patient opts not to share information at the vault level or globally.
   - The **Sensitive Results** flag can be applied to psychiatric, mental, and behavioral health data if a client has configured the application (during implementation) to secure specific data.

G. **Patient Indicators:** The following indicators may appear in a patient’s chart:
   - The **Read Only** indicator displays when a user is viewing a patient chart from a vault they are not currently logged in to.
   - The **Secured Data** indicator displays if a patient has secured clinical data to which the user does not have access, or if a patient has data in a vault to which the user does not have access.

💡 For inpatients, the patient’s room and bed number will be highlighted in yellow on that patient’s chart.
Invoke Security Override to View Secured Data
The Secured Data indicator displays if a patient has secured clinical data to which you do not have access. If you have Security Override permission assigned, you can perform this function. If you do not have this permission, you will be unable to view the patient’s data in that vault.

1. Click the lock on the **Secured Data** indicator.

2. Choose an override reason from the drop-down menu. Reasons are chosen by the client and may vary.

3. Click **Override Security**.

4. The locked icon will now display as unlocked. While the chart is unlocked, you will not be able to move to another tab until you lock it back.

Clinical Results
Clinical Results provides access to a patient’s **Clinical History, Labs, Fast Labs, and Deleted** documents.

View Clinical History
A patient’s **Clinical History** presents a chronological, comprehensive list of his or her patient documentation. It allows you to perform the following actions:
- Filter documents by All, My, or Document Type
- Move documents to a patient chart
- Move documents to a folder
- Delete documents
- View a document
- View lab results
- Access fast labs
- View and restore deleted documents

⚠️ Not all features are available to all users. Additionally, you must have administrative privileges to secure, move, or delete a document. Please see Appendix B: Levels of User Access for more information.
Filter Patient Documents
1. Access the patient’s chart and go to Clinical Results > Clinical History to display the documents list.

2. Click All, My, or one of the document types (e.g., labs, cardio). Documents will filter automatically.

Only document types present in a patient’s clinical history from both CareAlign and CareExchange are visible.

View a Document
1. Access the patient’s chart and go to Clinical Results > Clinical History to display the documents list. Click the title of the document you want to view.

2. Within the document, use the drop-down menu to show document Actions:
   - Secure Document: Check the box next to the security flag(s) you want to apply. Click Save.

This feature is only available if a site is configured to use secured documents. You must also have administrative permissions to secure a document.
- **Show Versions**: CareAlign always displays the most recent version of a document or patient result. Select this option from the *Actions* menu to view all available versions of a document.

3. Click the red X at any time to close the document and return to the documents list.
Labs
The Labs tab allows you to view all of a patient’s available lab results. All categories are displayed for each patient. Lab Graphs display Lab Results from one vault at a time to show changes in results over time.

View Lab Results
1. Access the patient’s chart and go to Clinical Results > Labs.

2. If the patient has lab results within a category, that category will appear dark gray. Empty categories will appear light gray and cannot be selected. Click a lab category name from the active menu options.

3. Available information will display automatically. Use the drop-down menu to change your Labs View. To set the default view, click Make this view the default for (Hematology, Chemistry, etc.). You will see confirmation that your choice is saved.

4. Results in red are outside the range set by the source system. A blue C denotes a comment that has been added by a provider. Click to view the associated comment. Hover over a value (as shown below) to view additional details.
Labs Views
Lab results are displayed in one of the following five views:

**Grid View**

<table>
<thead>
<tr>
<th>Pathology</th>
<th>SERUM A1A</th>
<th>CALCIUM PER DAY, UR</th>
<th>SODIUM, SERUM</th>
<th>Ordered By</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/15/09 12:02</td>
<td>123</td>
<td>-</td>
<td>-</td>
<td>Barr PA, Virginia P</td>
</tr>
<tr>
<td>10/11/09 20:35</td>
<td>-</td>
<td>See 0</td>
<td>-</td>
<td>Odom MD, Lorena W</td>
</tr>
<tr>
<td>04/09/09 02:05</td>
<td>-</td>
<td>-</td>
<td>See 0</td>
<td>Barber MD, Melissa P</td>
</tr>
</tbody>
</table>

**Excel View**

<table>
<thead>
<tr>
<th>Pathology</th>
<th>11/15/09 12:02</th>
<th>10/11/09 20:35</th>
<th>04/09/09 02:05</th>
</tr>
</thead>
<tbody>
<tr>
<td>SERUM A1A</td>
<td>123</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>CALCIUM PER DAY, UR</td>
<td>-</td>
<td>See 0</td>
<td>-</td>
</tr>
<tr>
<td>SODIUM, SERUM</td>
<td>-</td>
<td>-</td>
<td>See 0</td>
</tr>
</tbody>
</table>

**Expanded View**

<table>
<thead>
<tr>
<th>Pathology</th>
<th>Received: 11/15/09 [12:02]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ordered By: Barr PA, Virginia P</td>
<td></td>
</tr>
<tr>
<td>Accession: 5289L83505P</td>
<td></td>
</tr>
<tr>
<td>MRN: SCHOOL31180537</td>
<td></td>
</tr>
<tr>
<td>Vault: School of Medicine</td>
<td></td>
</tr>
<tr>
<td>Test: Battery - A1-ANTITRYPsin Value: 123 mg/dL Unit: mg/dL Range: 100-190</td>
<td></td>
</tr>
</tbody>
</table>

**Spread View**

11/15/09 12:02 - 5289L83505P
SERUM A1A 123 mg/dL (100-190)
10/11/09 20:35 - 5708W16504V
CALCIUM PER DAY, UR See mg/d (100-300)

**Grid View 2**

<table>
<thead>
<tr>
<th>Pathology</th>
<th>SERUM A1A</th>
<th>CALCIUM PER DAY, UR</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/09/09 02:05</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>10/11/09 20:35</td>
<td>-</td>
<td>See 0</td>
</tr>
<tr>
<td>11/15/09 12:02</td>
<td>123</td>
<td>-</td>
</tr>
</tbody>
</table>
Select a Date Range for Labs Results

1. Access the patient’s chart. Go to **Clinical Results > Labs** and click **Set a Lab Date Range**.

   ![Set a Lab Date Range](image)

2. Choose a date range using the **Quick Select** drop-down menu or use **Manual Select** to enter a range. Check **Keep the date range for this session** if desired.

   ![Quick Select](image)

3. Click **Submit**.

View Lab Graphs

**Lab Graphs** display lab results and allow you to see changes in results over time. You will only be able to view results from the vault you are in. Not all CareAlign client systems have this feature. Contact your System Administrator with questions about whether you have access to lab graphs.

1. Access the patient’s chart. Go to **Clinical Results > Labs** and click an active lab category name, highlighted in dark gray.

   ![Hematology](image)

2. Click the lab category name within the results.

   ![Set a Lab Date Range](image)
3. You will see the **Lab Graphs** screen. Click the lab buttons to choose one or more tests to display. If a lab category contains results from multiple vaults, only results from one vault will be displayed in the graph.

4. Change the view of this page using the **Lab Graphs** navigation:
   - **Reset Lab Graphs** to clear active graphs.
   - **Hide Lab Buttons** once you have made your selection(s).
   - **Show Bar Graphs** instead of line graphs.

**Fast Labs**
Fast Labs displays the results of lab tests completed in increments of 3, 6, or 12 months, depending on the date range you set.

**View Fast Labs and Set Preferences**
1. Access the patient’s chart. Go to **Clinical Results > Fast Labs** to view lab results for the past 6 months, which is the default date range. Click **Previous 6 Months** to display older results.
2. To change the default date range, go to **Customize > Preferences > Your Preferences** and scroll to **Other Settings**. Use the drop-down menu to select a new date range. See [Customizing Your CareAlign Experience](#) for more information on setting user preferences.

<table>
<thead>
<tr>
<th>General Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demonstration Mode</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Profile Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Address: <a href="mailto:jane.test@fam.dist.icamagiclab.com">jane.test@fam.dist.icamagiclab.com</a></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Display Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>After Logging In...</strong></td>
</tr>
<tr>
<td>In the Patient List (PL) tab...</td>
</tr>
</tbody>
</table>

| **When Opening a Patient Chart...**    |
| Show Patient History                   | None ▼ |
| Show Patient Summary                   | None ▼ |

<table>
<thead>
<tr>
<th><strong>Other Settings</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Patients Per Patient List Page...</td>
</tr>
</tbody>
</table>

| Date Range for Filtering Fasttabs Results | 6 months ▼ |
Patient History
Patient History allows you to view the following historical patient information:

- Visits
- Procedures/Diagnoses
- Immunizations
- Medications

Visit History
Visits displays information about a patient’s past visits to health care providers, hospitals, emergency rooms, and labs. Details include the visit and discharge date and time, provider, location, and complaint.

View Visit History
1. Access the patient’s chart and go to History > Visits.

2. Use the Show drop-down menu to select how much of a patient’s history you want to view.

3. Choose the types of visits you want to display (e.g., if you do not want to see Canceled appointments or No Shows, uncheck these boxes to filter the results accordingly).

4. Click any of the column headings on the Visits page (e.g., ACCT No., Visit Date/Time, Discharge) to sort visits.

View Detailed Visit Information
1. Access the patient’s chart and go to History > Visits. Click the ACCT No. to view details about a visit.
2. You will see a **Visit Summary** that shows available patient information, including medications, immunizations, diagnoses and procedures, allergies, and documents associated with that visit.
Move a Visit

1. If a visit is associated with the wrong MRN, a System Administrator or Vault Administrator can choose to Move This Visit to another MRN within the same vault. Moving a visit is different from moving a document, as the visit may be associated with multiple documents as well as the additional information included in the Visit Summary.

2. Enter the correct MRN and click Move Visit.

3. The visit and any documents that were moved along with that visit will now appear in the Clinical History and Visits of the new (“moved to”) MRN.

The visit and documents moved along with the visit will no longer be associated with the original MRN or visible in that patient’s Clinical Results or History.
Secure Account
1. To apply a security flag to a visit, click **Secure Account**.

2. Select the security flag(s) you want to apply. Click **Save**.

Procedures/Diagnoses
Procedures/Diagnoses displays information for visits at which an attending physician made a diagnosis or performed a procedure. **Sort** by clicking the column headings on this screen (e.g., MRN, Vault, Date).
**Immunizations**

Immunizations shows a patient’s immunization history. **Sort** immunization history by clicking any of the column headings (e.g., MRN, Vault, Immunization).

<table>
<thead>
<tr>
<th>MRN</th>
<th>Vault</th>
<th>Immunization</th>
<th>Series</th>
<th>Dose</th>
<th>Manuf.</th>
<th>Lot</th>
</tr>
</thead>
<tbody>
<tr>
<td>SCHOOL307204989</td>
<td>School of Medicine</td>
<td>rotavirus, pentavalent</td>
<td></td>
<td></td>
<td>MSD</td>
<td>#VZHDMM</td>
</tr>
<tr>
<td>SCHOOL307204989</td>
<td>School of Medicine</td>
<td>Hep B, NOS</td>
<td>2</td>
<td>35</td>
<td>CSL</td>
<td>#MCCGJ</td>
</tr>
</tbody>
</table>

**Medications**

Medications shows a patient’s **Active Medications**. Click the **Medication History** tab to see all medications, including their packaging, start date, dosage, and other information. **Sort** medications by clicking any of the column headings displayed on this page (e.g., MRN, Vault, Medication).

<table>
<thead>
<tr>
<th>MRN</th>
<th>Vault</th>
<th>Medication</th>
<th>Packaging</th>
<th>Start Date</th>
<th>Route</th>
<th>Dosage</th>
</tr>
</thead>
<tbody>
<tr>
<td>SCHOOL307204989</td>
<td>School of Medicine</td>
<td>DAROCET N 100 TABLETS 650/100</td>
<td>100 BOT</td>
<td>02/27/2012</td>
<td></td>
<td>650mg</td>
</tr>
<tr>
<td>SCHOOL307204989</td>
<td>School of Medicine</td>
<td>MEGESTROL ACETATE TABLETS USP</td>
<td>500 BOT</td>
<td>04/10/2010</td>
<td>inventore et distinctio</td>
<td>30cc</td>
</tr>
<tr>
<td>SCHOOL307204989</td>
<td>School of Medicine</td>
<td>CLINDAMYCIN HYDROCHLORIDE CAPLETS</td>
<td>30 BOT</td>
<td>01/04/2009</td>
<td>ex magni autem</td>
<td>60ml</td>
</tr>
<tr>
<td>SCHOOL307204989</td>
<td>School of Medicine</td>
<td>ZYRTEC-D 12 HOUR TABLETS 5/120</td>
<td>280 DOSE BOT</td>
<td>03/07/2007</td>
<td>esse alias quae</td>
<td>30cc</td>
</tr>
</tbody>
</table>

*Click the green plus sign to view the National Drug Code (NDC):*

- **DAROCET N 100 TABLETS 650/100**
  - NDC: 62584-032-00
- **MEGESTROL ACETATE TABLETS USP**
  - NDC: 00555-0606-04
Summaries

Patient Summary
The Patient Summary option provides an overview of a patient’s clinical information that includes Dashboards (if applicable), System Medications, Active Allergies, and Diagnoses.

1. Access the patient's chart and select **Summaries > Patient Summary**.

2. Click **Patient Summary**.

![Patient Summary Table and Diagram](image.png)

### System Medications

<table>
<thead>
<tr>
<th>MRN</th>
<th>Vault</th>
<th>Medication</th>
<th>Packaging</th>
<th>Start Date</th>
<th>Route</th>
<th>Dosa</th>
</tr>
</thead>
<tbody>
<tr>
<td>SCHOOL307204989</td>
<td>School of Medicine</td>
<td>PERPHENAZINE TABLETS</td>
<td>1 X 499 BAG</td>
<td>08/31/2006</td>
<td>eum illo atque</td>
<td>2 tablet</td>
</tr>
<tr>
<td>SCHOOL307204989</td>
<td>School of Medicine</td>
<td>LAMOTRIGINE TABLETS</td>
<td>1000 BOT</td>
<td>07/18/2006</td>
<td>nulla cumque neque</td>
<td>650m</td>
</tr>
<tr>
<td>SCHOOL307204989</td>
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<td>GABAPENTIN CAPSULES</td>
<td>36 BOT</td>
<td>04/21/2004</td>
<td>culpa eius voluptates</td>
<td>650m</td>
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</tbody>
</table>

### Active Allergies

<table>
<thead>
<tr>
<th>MRN</th>
<th>Vault</th>
<th>Description</th>
<th>Type</th>
<th>Severity</th>
<th>Reaction</th>
<th>Onset</th>
<th>R</th>
</tr>
</thead>
<tbody>
<tr>
<td>SCHOOL307204989</td>
<td>School of Medicine</td>
<td>KENTUCKY BLUEGRASS</td>
<td>Pollen Allergy</td>
<td>Severe</td>
<td>VOMITING</td>
<td>11/17/1997</td>
<td>1</td>
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<td>SCHOOL307204989</td>
<td>School of Medicine</td>
<td>FALLING ROCKS</td>
<td>Environmental Allergy</td>
<td>Moderate</td>
<td>ITCHING</td>
<td>10/01/1994</td>
<td>1</td>
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<tr>
<td>SCHOOL307204989</td>
<td>School of Medicine</td>
<td>EVIL</td>
<td>Miscellaneous Allergy</td>
<td>Mild</td>
<td>SWELLING</td>
<td>10/05/2002</td>
<td>1</td>
</tr>
<tr>
<td>SCHOOL307204989</td>
<td>School of Medicine</td>
<td>PACEMAKER</td>
<td>Miscellaneous Contraindication</td>
<td>Mild</td>
<td>ITCHING</td>
<td>09/25/1995</td>
<td>0</td>
</tr>
</tbody>
</table>
CCD
From within a Patient Chart, users can view, print, and download a patient’s CCD unless that patient has chosen Global Opt Out (GOO). If a patient is opted out, you cannot generate a CCD unless you are a Super User or ICA Administrator.

1. Go to **Patient Chart > Summaries > CCD**.

2. If the patient has aliases, as shown below, you can choose which CCD you want to view based on the MRN and information shown. By default (i.e., if you do not change the selection in the drop-down menu), the displayed CCD will match the MRN associated with the Patient Chart you are currently viewing.

3. Once you have made your selection, the CCD will populate. Click Download to download and save an .xml version of the CCD, or click the print icon to the right to print the document.
Search within a Patient Chart
These search features allow you to search quickly and easily for lab results or other information in a patient’s chart rather than sorting through all available documentation.

Search a Patient Chart
Access the patient’s chart and go to Search > Patient Chart. Enter the search term(s) and click Search.

Note the search tips provided. You can search for multiple words, use the “wildcard” to broaden your search, or search for specific phrases.

4. Search results will display in full text, and search terms will appear in red.
Using CareSecure Messaging

CareAlign’s HIPAA-compliant secure messaging system allows you to securely send and receive patient information across the healthcare information exchange community. Only System Administrators and Message Administrators can create secure messaging mailboxes for new and existing users. There are two ways to create a mailbox:

- For instructions on creating a mailbox for a new CareAlign user, see Account Administration.
- For instructions on creating a mailbox for an existing CareAlign user, see Message Administration.

If you have access to Secure Messaging and have a mailbox, you are able to view, compose, send, and receive messages within the MG tab. In this chapter you will learn to do the following:

- View Messages
- Search your Mailbox for a Message
- Understand Message Indicators
- Manage and Reply to Messages
  » Compose and Send a Message
  » Add an Attachment
  » Save a Message as a Draft
  » Archive a Message
- Use the Address Book and Manage Favorites
- Change your Mailbox Settings

View Messages

1. When you log in to CareAlign, you will see a message notification above the search bar. The number of urgent messages in your mailbox will be highlighted in red.

![Message Notification Example]

2. Click inside the message notification bar or go to Secure Messaging in the side navigation to access your default inbox in the MG tab. If you have access to more than one mailbox, you will see tabs for each one.

![Mailbox Example]
3. Click a message in the email list to display that email in the reading pane. If patient information is attached, click View or Download to access the attachment. The download will appear in XML format.

 Emails in Secure Messaging are stored as threads, which include replies and forwards so that you can easily view entire conversations with one click. Replies are hierarchically expanded in the message pane and identified by graduating, indented color bars so that individual messages are easy to identify.

4. Click the Inbox arrow to view a list of the folders in your mailbox.
5. You will see the default folders and any additional folders you have created.

- **Inbox**: Holds all incoming message threads.
- **Sent**: Holds all outgoing messages that have been sent.
- **Archive**: When your inbox exceeds a defined number of messages (the default is 100), messages are automatically moved to your Archive folder. Any messages that have been saved to the patient chart are automatically added to the Archive folder.
- **Drafts**: Holds draft emails that you have saved in your inbox to complete and/or send in the future.
- **User-created folders**: Hold messages you move into a folder. Click **Add Folder** to create a new folder.

*Note that messages cannot be permanently deleted. They can be moved to the Archive folder, but will still appear in threads in which they are referenced.*

6. Use the drop-down menu that appears in each folder to sort your messages. Choose All, External, Urgent, or Unread.

- **All** displays all message threads in the mailbox.
- **External** displays all messages sent from outside your vault.
- **Urgent** displays all message threads that were marked urgent by the sender.
- **Unread** displays all unread message threads.

7. Click the **refresh** icon to manually refresh your mailbox and load any new messages. Your mailbox will also automatically refresh at regular intervals.
Search your Mailbox for a Message

The search feature allows you to search your direct messages within your mailbox folders. Search will only return results from within your current folder (e.g., if you are in the Drafts folder, it will return draft messages that match your search terms).

1. Go to **Secure Messaging** in the side navigation to access your default inbox in the MG tab.

2. Enter terms in the search bar to search the following fields:
   - To:
   - CC:
   - Subject:
   - Message body

   Note that “Body” refers to the message text as well as any information within attached .txt or .xml files, including CCDs. However, this feature will not search the file name of the attachment.

3. The search will only return results that exactly match the phrase you enter in the search field; it does not do “OR” searches. In other words, the search box functions as if you put quotation marks around a phrase. If you are not seeing the anticipated results, consider simplifying your search terms.

4. Messages that match your search terms will appear. In the example shown below, the term appears in the attached CCD.
Message Indicators
A variety of indicators provide information about the emails in your mailbox:

A. The word **DRAFT** indicates that a saved draft (e.g., a reply that has not yet been sent) is attached to the thread.

B. A **paper clip** indicates that there is an upload from the Patient Chart attached to the message.

C. A **red** subject line indicates that an email was marked as Urgent by the sender.

D. A **patient icon** indicates that there is patient data from CareAlign attached to the email.

E. A **blue** conversation bubble shows the number of emails contained in a message thread.
Manage and Reply to Messages
When viewing a message in the reading pane, use the icons at the top of the email to do the following:

A. Reply to the sender
B. Reply to all
C. Forward the email to another recipient
D. Mark the message as unread
E. Mark the thread as unread
F. Print the thread
G. Move the message thread to a folder
H. Save the message thread to the CareAlign patient chart

Compose and Send a Message
1. Go to Secure Messaging in the side navigation. Click new.
2. You will see the New Message screen.
3. Click in the **To:** field to enter a recipient. When drafting a new secure message, you can populate the “To:” field in three different ways:
   - Enter the user’s email address manually
   - Choose a user from your favorites
   - Search for a user

   ![Image of email interface with To, CC, and urgent fields filled]

   *See Using the Address Book for information on populating and using your address book.*

4. Enter a **Subject:** and body text. Add any **Attachments.** Check **Urgent** if your message is urgent.

5. Review your email and click **Send.** You can now see a copy of the email in your **Sent** folder.

6. If you send a message from a shared mailbox, the email will indicate which user sent the message.

   ![Image of email sent from shared mailbox]

**Add an Attachment**

1. Go to **Secure Messaging** in the side navigation. Click **new.**

   ![Image of new message icon]

2. In the **New Message** pane, click the +**attachment** button to attach a file to the email.

   ![Image of attachment button]

3. You will see two (2) options for adding an attachment:
• **Upload** a file from your computer or network: Choose upload and then click **select files**. Choose a document(s) that resides on your computer or network. You may attach multiple files.

  ![Attachments](image)

• **Patient Summary**: Choose a patient and click **attach**. You can select a patient from any vault you have access to. If the patient has aliases, as shown below, choose which CCD you want to attach based on the MRN and information shown. The CCD will include only the patient information associated with the one MRN you choose, and you can only attach one CCD per message.

  ![Attach Patient Summary](image)

4. You will see that patient information, which is indicated by the patient icon, is attached to the email. Click **Send**. You can now see a copy of the email in your **Sent** folder.

5. If you send a message from a shared mailbox, you will see which user sent the message.

  ![Message Details](image)

**Save Message as a Draft**

If you are in the process of creating or responding to a secure message and want to save your progress, you can save the message as a draft.

1. At the top of the **New Message** screen, click the **save** button.
2. You will see a notification in the message thread that “A saved reply has been started.” You will also see a DRAFT message indicator attached to the thread in your email list.

![Notification of saved reply](image)

3. Your draft messages will be saved in the Drafts folder.

![Drafts folder](image)

**Archive a Message**

If you are approaching or have met your mailbox size limit, or if you no longer want or need certain messages to appear in your inbox, you can move messages to your Archive folder. Once messages have been archived, they no longer count toward your mailbox quota. The following steps demonstrate how to Archive messages in your mailbox. Note that there is not an option to select and move multiple messages.

1. Once you have selected Secure Messaging and you are in your mailbox, click a message in the email list to display that email in the reading pane to the right of your mailbox.

![Message in reading pane](image)

2. When viewing a message in the reading pane, click the icon shown below to Move the message thread to a folder.

![Move icon](image)
3. Once you click on the icon, you will see a list of folders to which you can move your message. This includes the Archive folder and any other folders you have created. Choose Archive.

4. You can now access these messages by going to your Archive folder. Archived messages will continue to appear in their original message threads.

Use the Address Book
The Address Book allows you to search for a user’s email address and to manage and easily access your favorite email addresses. In this section, you will learn to do the following:

- Search for a user
- Add or Remove a favorite
- Create a favorite
- Send a message to a favorite

Search for a User
CareAlign's Search feature allows you to search for any data that is stored about a record, including the following:

- Email Address
- Vault Code
- Mailbox Name
- First Name
- Last Name
- Company Name
- Address1
- Address2
- City
- State
- Zip Code
- Specialty
- Provider Type
- NPI
1. Go to **Secure Messaging** in the side navigation and click **new**. In the **New Message** pane, click the **Address Book** icon.

![New Message](image1)

2. Enter the piece of information you would like to search by (e.g., first and last names, address, city) in the search box next to **Address Book**.

![Address Book Search Results](image2)

3. In the search results, click the contact icon to add the mailbox to the **To:** field of your email.

![Search Results](image3)

4. Users can also search for the following information in the Address Book Search field and in the To:/CC: fields:
   - Personal favorites
   - Addresses in the current vault
   - Addresses published from other vaults
   - Global addresses
   - Direct address domain (e.g., doctor@direct.hospital.org would be returned when searching for direct.hospital.org)

![Search Results](image4)
Manage Favorites

Add a Favorite

1. Go to **Secure Messaging** in the side navigation and click **new**. In the **New Message** pane, click the **Address Book** icon.

![New Message](image)

2. If you have favorites, you will see them displayed. If you do not, you will see “No results found.”

![Address Book](image)

3. Conduct a **Search**. In the search results, click the heart icon next to the mailbox name to add that email address to your favorites.

![Address Book](image)

4. You will see the heart icon turn red.

![Search Results](image)
Remove a Favorite
1. Go to **Secure Messaging** in the side navigation and click **new**. In the **New Message** pane, click the **Address Book** icon.

   ![New Message Screenshot]

2. You will see a list of your favorites. Click the red heart icon next to the mailbox name to remove a favorite. You will be asked to confirm. Click yes. The heart icon will return to gray.

   ![Remove Favorite Screenshot]

*If a mailbox is archived and deactivated, it will automatically be removed from the address book and from your favorites.*

Send a New Message to a Favorite
1. Go to **Secure Messaging** in the side navigation and click **new**. In the **New Message** pane, click the **Address Book** icon.

   ![New Message Screenshot]

2. The **Address Book** will automatically display your favorites.

   ![Address Book Screenshot]
3. Click the contact icon to enter that email address in the To: field of your email.

Create a Favorite
1. Go to Secure Messaging in the side navigation and click new. In the New Message pane, click the Address Book icon.

2. Click create.

3. A New Favorite Address window will pop up. Enter the First Name, Last Name, Email Address (required), City, State, and Specialty for the new favorite and click Add.

💡 When you create a favorite address, it will automatically appear in your Address Book favorites. Any favorite addresses you create will only be visible to you.
Change your Mailbox Settings
These settings are mailbox specific. You can make selections for each mailbox you have access to.

1. Go to **Secure Messaging** in the side navigation. Select the correct mailbox and click the gear icon.

2. You will see your mailbox settings. Click **Save** at the bottom of the screen to save any changes.

<table>
<thead>
<tr>
<th>General</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Address</td>
<td><a href="mailto:emily.maffett@fam.dist.icamagiclab.com">emily.maffett@fam.dist.icamagiclab.com</a></td>
<td></td>
</tr>
<tr>
<td>Receive Message Notifications?</td>
<td></td>
<td>Your email address is <a href="mailto:Emily.maffett@icainformatics.com">Emily.maffett@icainformatics.com</a>.</td>
</tr>
<tr>
<td>Shared Users</td>
<td>Barbara Johnson ADM (icabjohnson) ×</td>
<td>Carol Oot (icacaroloot) ×</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>User Settings</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Default Mailbox</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Message Signature</td>
<td>Sincerely,</td>
<td>Emily Maffett</td>
</tr>
<tr>
<td></td>
<td></td>
<td>ICA</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Provider Directory</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Publish?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>City &amp; State</td>
<td>Nashville</td>
<td>Tennessee</td>
</tr>
<tr>
<td>Specialties</td>
<td>Pediatric Cardiology ×</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Auto Forwarding</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Keep a copy?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recipients</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
General Settings
1. Check **Receive Message Notifications**? If you would like to be notified when you have a secure message. Ensure that the email address displayed is correct.

![General Settings](image)

2. Confirm that the **Shared Users** field lists the other users who should have access to this mailbox. Add or remove users as necessary.

⚠️ If you are a mailbox user, and not the mailbox owner, your settings will only allow you to change your Message Notification, Signature, and Auto Forwarding settings.

User Settings
1. Check the box next to **Default Mailbox** to set that mailbox as your default. If you are currently in your default mailbox, this box will already be checked.

![User Settings](image)

2. To add a signature at the end of your outgoing messages, type your desired signature in the box provided.

![Message Signature](image)

⚠️ Users can manage their own signature for each mailbox they have access to. For example, if there are two users of the same mailbox, both users can have different signatures for that mailbox. In addition, if one user has access to two mailboxes, that user can have a separate signature for each mailbox.
Provider Directory

1. Check Publish? to publish your email address to the Provider Directory, which will make it visible to all users. If you choose not to publish your email address, it will only be seen by users in the default vault where your mailbox is established.

2. Enter your City & State and Specialties (optional). This allows users to search for your email address using these terms.

![Provider Directory Form]

Auto Forwarding

Auto Forwarding allows you to automatically forward your secure messages to another secure email address.

1. Check Keep a copy? if you would like to receive a copy of your emails in both mailboxes.

2. Enter the secure email address or addresses to which you would like to forward your emails. The address must be a secure email address in your default vault or in the vault where the mailbox resides.

![Auto Forwarding Form]
Customizing Your CareAlign Experience

Customize allows you to choose how patient information displays in CareAlign.

- Update your preferences and the preferences of other users (with the proper permissions)
- Choose actions to include in your patient list actions bar
- Configure your patient list columns

Update Your Preferences

1. Go to Customize > Preferences in the side navigation. You will see General, Profile, Display, and Other Settings. System defaults for each setting are shown below.

<table>
<thead>
<tr>
<th>Preferences</th>
<th>General Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Demonstration Mode</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Profile Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Address</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Display Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>After Logging In...</td>
</tr>
<tr>
<td>In the Patient List (PL) tab...</td>
</tr>
<tr>
<td>When Opening a Patient Chart...</td>
</tr>
<tr>
<td>Show Patient History</td>
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<tr>
<td>Show Patient Summary</td>
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</table>

<table>
<thead>
<tr>
<th>Other Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patients Per Patient List Page...</td>
</tr>
<tr>
<td>Date Range for Filtering Fastlabs Results...</td>
</tr>
</tbody>
</table>

2. Check Demonstration Mode if desired. Demonstration Mode masks patient names by showing only initials in Patient Chart, Clinical History, Patient Lists, and Fast Labs.