CliniSync Technical Support
Help Desk Information & Hours of Operation

Service Desk Information:

• Core business hours are Monday-Friday from 8:00 A.M. until 5:00 P.M.
• When in need of technical support, submit a ticket via the CliniSync Online Support portal at www.support.clinisync.org
  o Click “Submit a Request” at the top of the page to enter all necessary information and submit the form. ONLY include PHI in the box titled “Patient Health Information”. This box is encrypted, while the others are not.
• For critical issues only, call the CliniSync Support line at 1-800-645-8192 (Please see Support Guide for critical issue definition.)

Please be careful when submitting Patient Health Information. Place patient health information in the correct box, titled Patient Health Information, when submitting an incident.

24/7 Critical Issues
Call:
1-800-645-8192

CliniSync Support Portal
Log into:
www.support.clinisync.org
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Appearance and Performance
Much of the work done in this release was back-end infrastructure work. Because of the back-end technical work, every user should experience performance gains. A significant change that you will notice in this release relates to the User Interface (UI). Every single page in the CHR was rebuilt using updated style sheets. While each page maintains a similar look and feel, you may notice subtle changes throughout the application. These changes should not impact your user experience except to make the application more accessible between different browsers and among different screen sizes and resolutions.

Minor User Interface Change as Seen on the Patient Summary Page

Browser Support Validation
In this release of the CHR, a new code has been added that detects if the user’s browser is a supported browser. The browser validation is done during the login, and it is undetectable to most users. If the CHR browser check identifies that the user is utilizing an unsupported browser, the CHR displays the following message:
A user who sees this message can close the dialog, and CHR will still open the application. However, the application may not function as expected. **Note: This CHR version supports the following: Explorer 10 and 11, Firefox 25 or newer, Chrome 32 or newer, and Safari 7 or newer.**

**Advanced Search Option**
This release of the CHR includes a new Advanced Patient Search feature. The Advanced Patient Search can be accessed through a link on the Patient Search page. From here, you can enter very specific search combinations to locate a patient’s CHR chart.

**Patient Age Display**
In prior versions of the CHR, the Patient Demographics Header displayed the Age of patients as “0” if their age was less than 1 year old. The application now displays the age for all patients under one year as follows:

- If the patient is under one year old but greater than 1 month, the application displays the age of the patient in terms of months (example: 2 months)
- If the patient is not yet one month old, the application displays the age of the patient in days, (example: 8 days)

**Incremental Data Pull Back: Patient Chart Load**
In past versions, the CHR would retrieve all records, and then the CHR would display the three most recent records in each summary section. This created serious slow-down issues. In this new version, a
new sorting option is utilized. By using this sorting option, the CHR now pulls only the three most recent records in each summary section. The query itself is much more efficient. Users should see improvements in performance.

**Incremental Data Pull Back: Limit Items Called and Returned within UI (CHR)**

To improve load times on the Patient Results and Patient Encounters pages, we added a new Date Range filter. The Date Range filter provides organizations an option to define a default date range for users as they open the Patient Results and Patient Encounters pages. Specifically, you can now limit the number of results returned to a user based on a specified date range (Last 30 Days, Last 3 Months, Last 6 Months, Last Year, and All Records). When viewing clinical data, the default date range is “Last Year”, except in the Patient Summary, where only the most recent three items per category are displayed. Users may change this range after accessing the page.

*Note: A notification has been added to inform a user when results may exist but may only be visible after the user adjusts their date range. For example, if the date range has been set to results for the last year, a CHR user may not see results when accessing the Patient Results tab. If a user accesses the Results tab and no results are visible, the CHR will display the following message: “No records were returned for this patient based on the default date range. Please increase your date filter to ensure all records are returned.”*

**Prescription Drug Monitoring Program (PDMP): Ability to Query OARRS Enabled**

In the CHR, functionality has been added to assist clinicians with identifying medication usage for patients regarding medication that has been identified as controlled substances by OARRS. The new Prescription Drug Monitoring Program displays filled prescriptions as recorded by OARRS. When applicable, PDMP access should be requested per user to your CliniSync representative or CliniSync Support team, as access requires additional features be added to your rights in addition to the rights inherent in the clinical CHR role. To use the PDMP feature, you may follow these steps:
1. Access the Patient Chart by searching for, and selecting, the desired patient. The CHR displays the Patient Summary tab of the Patient Chart page.

2. Click the Medications tab.
3. Click the Prescription Monitoring Program tab.

![Prescription Monitoring Program Tab]

4. Enter the desired date range in the Start Date and End Date fields (use the MM/DD/YYYY format). You may select the dates using the date-pick calendar if you wish.

5. Click the Submit Query button. The CHR displays the PMP results in the Prescription Monitoring Program panel.

![Medication History]

**Multi-Session State**

In this release, the way the application opens a patient chart has been redesigned. Now, every time the CHR opens a patient chart, the application assigns a globally unique identifier (GUID) to the address. The GUID is unique for the patient and the session. This reengineering allows CHR users to bring multiple CHR patients into focus at one time. This can be done while logged in to the web portal manually or via Single Sign On (SSO).

**Patient Chart Tooltips**

A tooltip has been added next to several items within the patient chart. When you hover over the tooltip, you will discover information about this item. You will see the tooltip next to the following items:

- Last Reported column heading in the Problems list on the Encounters tab
  - When a user hovers over the icon, the tip reads “This value is populated by the Diagnosis date of each Problem. The date filter dropdown option filters out items based on the admit date of the Encounter associated with them.”
• Date column heading in the Results list on the Results tab
  o When a user hovers over the icon, the tooltip reads “This value is populated by the Observation date; if the Observation date does not exist, the Requested date will be used. If both Requested and Observation dates were sent, the date filter dropdown option filters out items based on the Requested date. If only one of these were present in the HL7 then that is the date used to filter the result.”

• Date column heading in the Allergies panel on the Medications tab
  o When a user hovers over the icon, the tooltip reads “This value is populated by the Identification date. The date filter dropdown option filters out items based on the admit date of the Encounter it is associated with.”

 Tooltip Example

Result Details Page: Modify Order of Lab Results, Header
The Result Details page now displays the name of the test followed by the header, the test results, and then the performing lab. For this story, the Date Collected header that appeared at the top of the lab has been removed. This was removed because this information is also displayed with each test result.
**Result Details Page: Modify Order of Lab Results, Performing Lab**

The Result Details page now displays the name of the test followed by the header, the test results, and then the performing lab. In previous versions of CHR, the Performed By information was included as a list at the very end of the Result Details page. If a lab had three tests performed on it, you would see three “Performed By” detail sets at the end of the report.

For this story, “Performed By” information for each test has been moved to the end of each test. This should make it easier to identify who completed the test.

**Hosted Referrals: Limit Access to Referral History**

A feature has been added that allows Admins to limit a user’s access to Referrals history. This panel includes the following options: 1) All Referral History Access, 2) Limit to referrals sent to/from that user’s Organization, 3) Limit to referrals sent to/from the individual user (or providers for which the user is
The Patient Referrals page has been modified so that it displays only the referrals conforming to the preference selected in the Patient Referral History rights panel.

Hosted Referrals: Configurable Drop-Down Lists for Services Offered and Specialties

New functionality has been added that allows CliniSync’s technical vendor to customize the list for Services and Specialties on the Hosted Referrals page. No user interface changes are visible with this change other than the customized options that display in the list of services. For requested changes to the Services/Specialties representing your organization, as used within the referrals module, please contact CliniSync Support.

Hosted Referrals: Require Network Selection

On the Source tab in the New Patient Referral workflow, the new version includes a new list menu labeled Network Association. Once the Source Provider is selected, the CHR populates the Network Association drop-down with any networks that the source provider is associated with. This is a new required field. Along with the networks, we also included a Decline to Select option. If the selected
Source Provider is associated with multiple networks, the system should require the Network Association.

This function has replaced the Network (drop-down) list on the Destination tab with a checkbox labeled Search In-Network Only. If the referral has a network association designated on the Source tab, then this option should be selected, and the system should filter the list of available providers per that network designation.

*Note: Contrary to the above screenshot, CliniSync does not support functionality to send referrals via secure email from within the CHR Referrals module.*
Hosted Referrals: Add a Care Summary to a Referral during Referral Creation

In this new version, the Hosted Referrals component now leverages the general CHR functionality of creating a Care Summary to allow the user to attach a Care Summary when creating and sending a Referral.

![Referral Creation Screenshot]

Hosted Referrals: Provider Search Enhancements

The provider search functionality in New Patient Referral has been optimized to make it easier to find matching providers.

- Search by Name: The Provider list now supports searches using both last name and first name at the same time. Users may search for a provider by typing in the last name, followed by a comma, and then the first name. You can still perform a search without a comma, and the CHR will use the old search logic.

![Provider Search Screenshot]
• Sort Specialties First: The Specialties/Services list has been renamed, and it has been reordered to display specialties before services. You can see an example of the Specialty/Service list with Specialties displaying before Service.

• List Only the Specialties or Services Available by a Provider: The Specialties/Services list has also been updated to display only specialties and services that are in use by providers in the Provider Directory.

**Hosted Referrals: Reassign Referral after Accepted**

The statuses that a referral can be assigned to by another provider have been extended to better support centralized referral coordination within an organization. Previously, a referral could be reassigned only when the referral was in the “New” status. With this new version, the Referral Assigned Provider can now be updated at any time while the referral is still open. Referrals can now be reassigned while it is in the New, Accepted, Scheduled, and Consult Added statuses.

**Hosted Referrals: Allow Consult Note Attachments after Referral is Closed**

Users can now continue to add Consult Notes to Completed referrals. This allows communication to remain ongoing between sending and receiving referral coordinators even after the referral has been closed.

**Hosted Referrals: Structured Reasons for Declined and Cancelled Referrals**

To provide better reportable data on why referrals cannot be completed, the reason justification has been updated. System users now select the reason for declined or cancelled from a standardized set of reasons. Structured reason values can be found in the referral expanded display of the referral worklist and in the referral. The reasons values are available any time a referral is Declined, Requested for Cancellation, or Cancelled, as follows:

- No availability
- Patient chose alternate provider
- Patient did not show
- Patient does not have insurance
- Patient states they do not need service
- Unable to contact patient
- Unable to handle care needs of the patient
- Unable to take patient’s insurance
- Referral sent in error
- Requested provider does not practice at location

Hosted Referrals: Attachments Size
In prior versions, the CHR allowed system users to attach documents exceeding the 20 MB limit; if a user added attachments to a referral and the file or files exceeded the 20 MB limit, Referrals would display the document in the Referral Documents list. But it would not display a delete button next to the last uploaded document. The impact was that a system user could not send the referral. Referrals now enforces the 20 MB limitation for attachments and the delete button displays next to every attached document.