



CareAlign

v. 3.2.10

User Guide

Direct Messaging and Patient Query

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www.khinex.org

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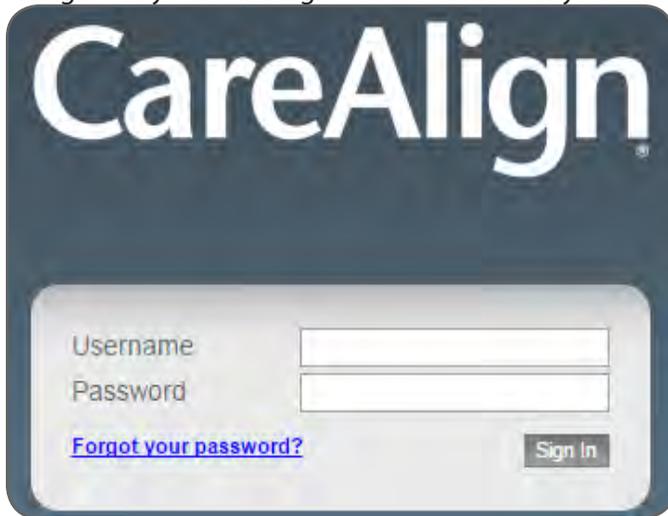
Getting Started

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

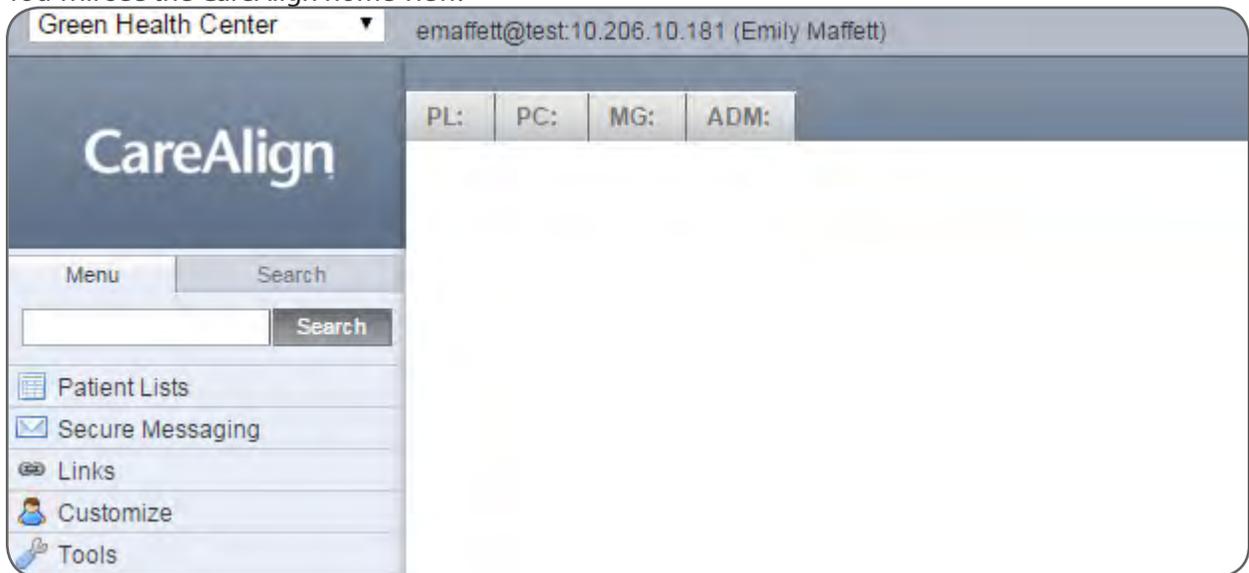
Log in

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.

Change Password

- 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).

Current Password ! This value is required.

New Password

Confirm Password

Change

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.

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

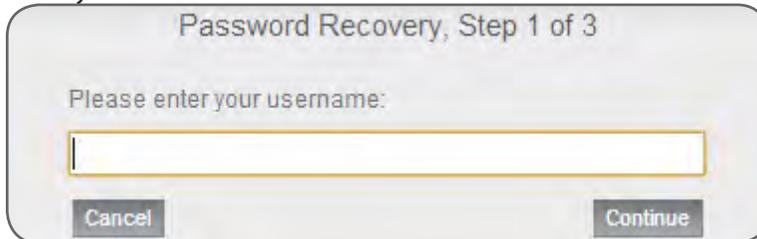
1. Click **Forgot your password?** on the login screen.



A screenshot of a login interface. At the top, there is a partially visible 'Password' field. Below it, the text 'Forgot your password?' is highlighted with a red oval. To the right of this link is a 'Sign In' button.

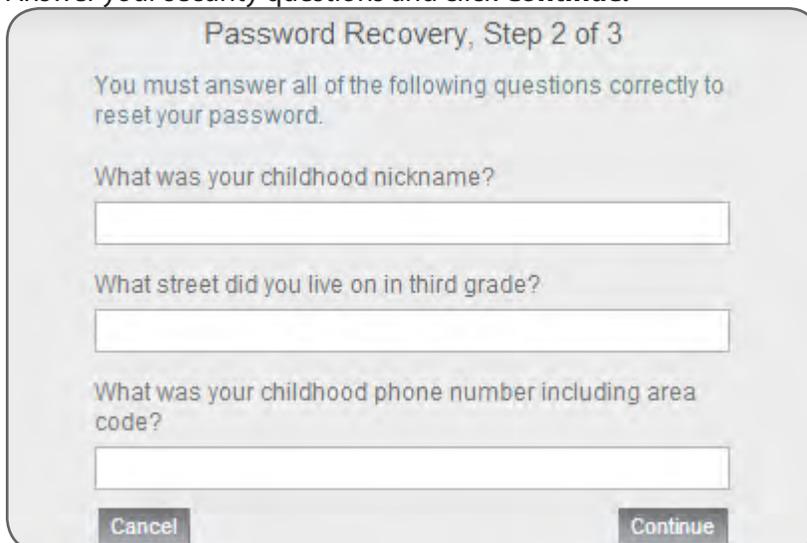
 You can recover your password at any time unless your account has been locked. After 5 attempts, your account will be **Locked**. To unlock your account, call your designated Help Desk to reset your password.

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



A screenshot of the 'Password Recovery, Step 1 of 3' screen. It features the heading 'Please enter your username:' above a single-line text input field. Below the input field are two buttons: 'Cancel' on the left and 'Continue' on the right.

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



A screenshot of the 'Password Recovery, Step 2 of 3' screen. It contains the instruction: 'You must answer all of the following questions correctly to reset your password.' Below this are three security questions, each with a corresponding text input field: 'What was your childhood nickname?', 'What street did you live on in third grade?', and 'What was your childhood phone number including area code?'. At the bottom are 'Cancel' and 'Continue' buttons.

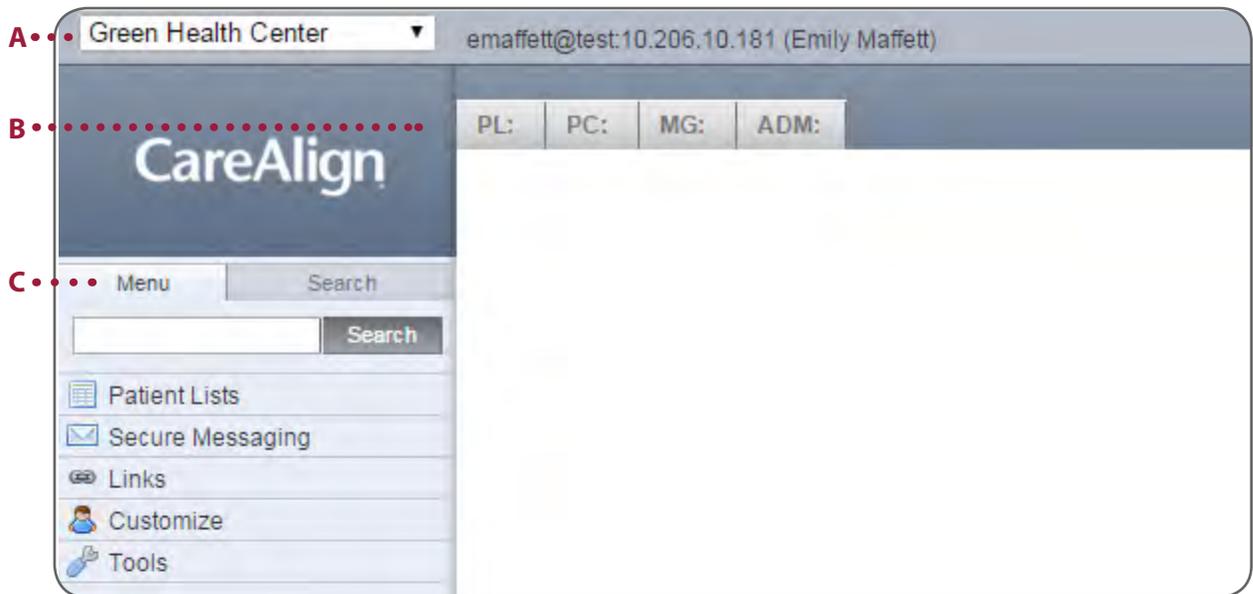
4. Enter your New Password, being sure to meet the designated **password requirements**. Enter your new password again in the **Confirm Password** field. Click **Continue** to return to the login screen.



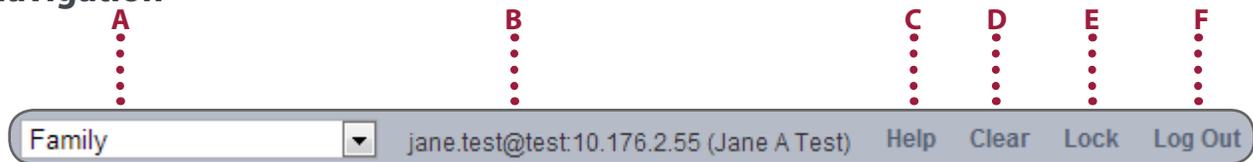
A screenshot of the 'Password Recovery, Step 3 of 3' screen. It has two text input fields: 'New Password:' and 'Confirm Password:'. Below these fields are 'Cancel' and 'Continue' buttons.

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.



Top Navigation



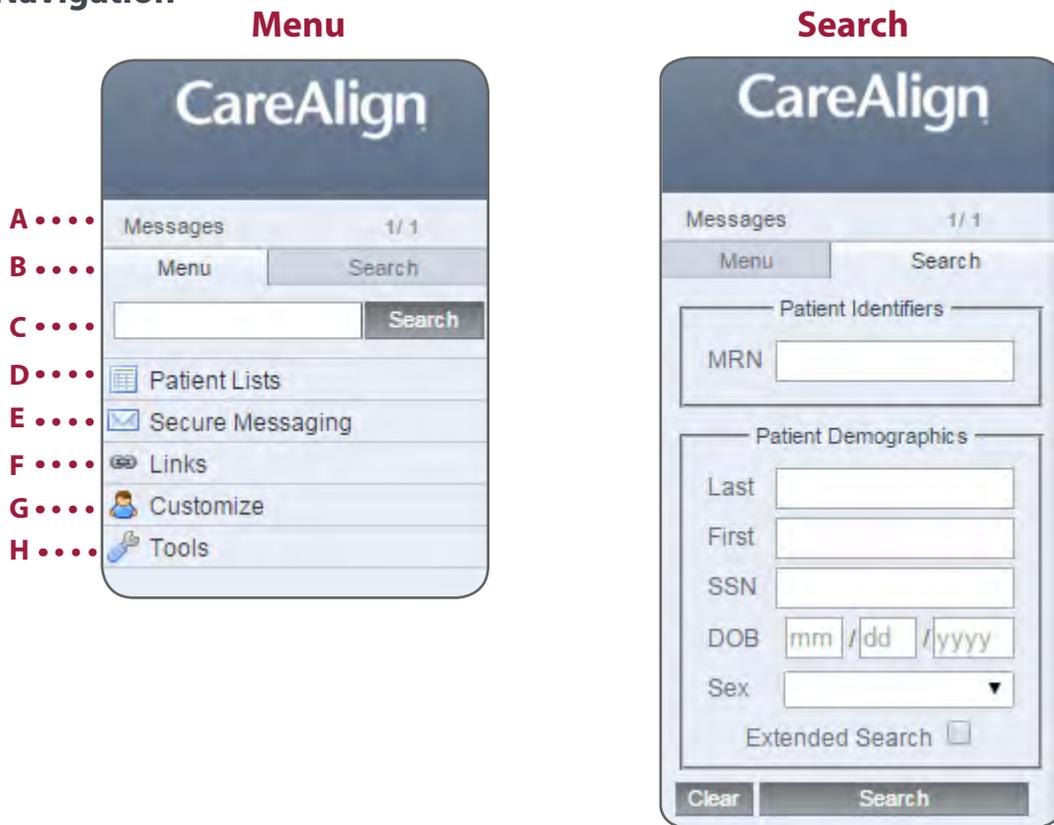
- A. Vault selection:** Vaults are used to separate participants within a healthcare information exchange. Choose the vault you would like to work in from the drop-down menu, which lists all vaults you have permission to access.
- B. User information:** Identify the user currently logged in to the system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



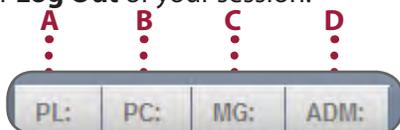
Side Navigation



- 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.

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.



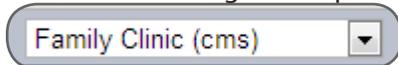
- A. **PL (Patient Lists):** Displays Search results or Patient Lists.
- B. **PC (Patient Chart):** Displays a Patient Chart you have chosen from Search results or a Patient List.
- C. **MG (Secure Messaging Inbox):** Displays your Secure Messaging mailbox.
- D. **ADM (Administration):** Displays tools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

Search for a Patient

Conduct a Quick Search

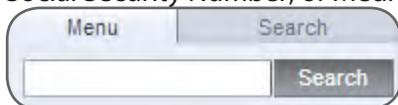
Quick Search is the fastest way to find a patient who has data in the vault where you perform the search. If a patient only has data in other vaults, Quick Search will not find that patient. If you know the patient has been seen by a provider in your vault, use Quick Search first. If the patient has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

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



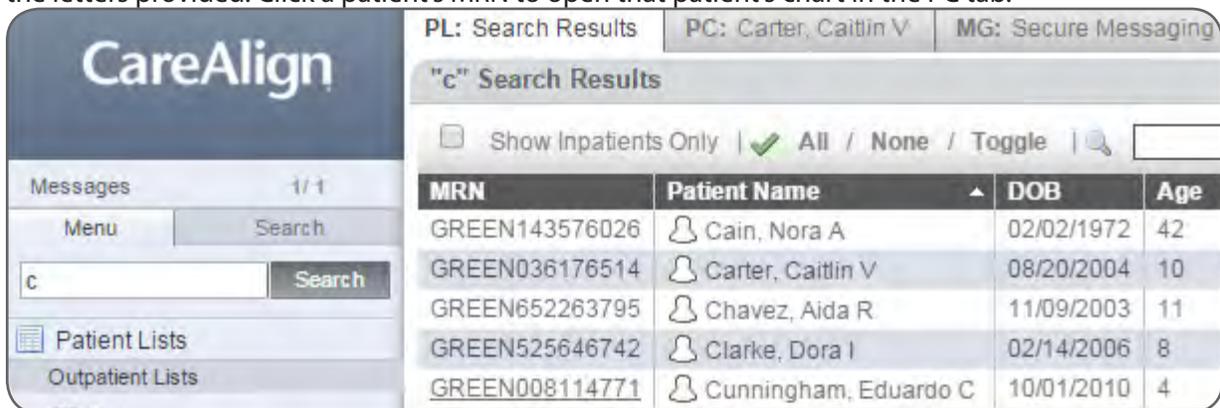
A screenshot of a dropdown menu with the text "Family Clinic (cms)" and a downward-pointing arrow.

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.



A screenshot of a search interface with a "Menu" button, a search input field containing the letter "c", and a "Search" button.

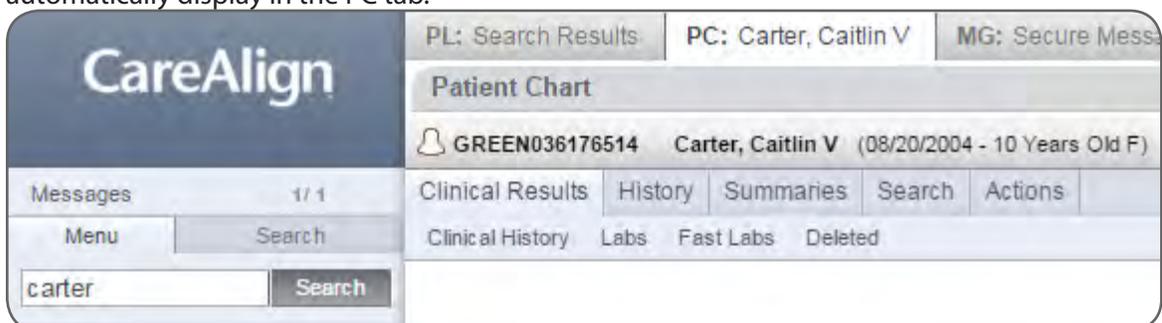
3. Results will display in the PL tab. Using a partial name will return patients whose last names begin with the letters provided. Click a patient's MRN to open that patient's chart in the PC tab.



A screenshot of the CareAlign interface showing search results for "c". The interface includes a sidebar with "Messages 1/1", "Menu", "Search", "Patient Lists", and "Outpatient Lists". The main content area shows "PL: Search Results", "PC: Carter, Caitlin V", and "MG: Secure Messaging". Below this is a table of search results for "c".

MRN	Patient Name	DOB	Age
GREEN143576026	Cain, Nora A	02/02/1972	42
GREEN036176514	Carter, Caitlin V	08/20/2004	10
GREEN652263795	Chavez, Aida R	11/09/2003	11
GREEN525646742	Clarke, Dora I	02/14/2006	8
<u>GREEN008114771</u>	Cunningham, Eduardo C	10/01/2010	4

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.



A screenshot of the CareAlign interface showing the patient chart for Carter, Caitlin V. The interface includes a sidebar with "Messages 1/1", "Menu", "Search", "Patient Lists", and "Outpatient Lists". The main content area shows "PL: Search Results", "PC: Carter, Caitlin V", and "MG: Secure Messaging". Below this is a "Patient Chart" section for "GREEN036176514 Carter, Caitlin V (08/20/2004 - 10 Years Old F)".

Clinical Results | History | Summaries | Search | Actions

Clinical History | Labs | Fast Labs | Deleted

- 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.

MRN	Patient Name	DOB	Age	S	Facility	Pt. Ty	Adm. Date
5826	WONG, Darrin	09/20/2002	11	M		Unknown	12/03/2013
MIDTOWN379044182	Wong, Darrin J	09/20/2002	11	M	FAMILY MEDICAL ASSOCIATES	Unknown	10/16/2007

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.

- 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**.

You must enter a First & Last Name, MRN, or SSN (i.e., you cannot enter only a first or last name).

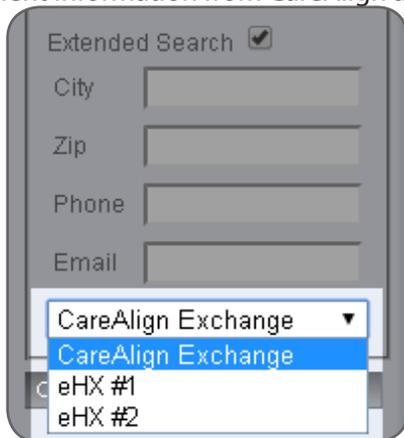
- Results will display in the PL tab, including the location of the patient information (e.g., which vault it is in). Check the boxes next to patient information you want to view, and click **View Selected Charts** to open those charts in the PC tab.



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.



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.)

The screenshot shows a web interface titled "Community Search". At the top, there is a message: "Results were found. If correct patient was not found, check the 'Extended Search' box and enter required fields." Below this, the patient's name "Jacobs, William Ryan" is displayed, along with "82 Years Old - 03/10/1932 - M". A table lists search results with columns: Location, ID, Last Name, First Name, Sex, SSN, and DOB. The first row is checked and shows "Midtown Hospital" with ID "1003355" and first name "William". Below this is a section for "Potential Matches" with two rows: one for "Midtown Hospital" with ID "1004421" and first name "Bill", and another for "_GOO" with ID "6" and first name "Bill". A button labeled "View Selected Charts" is at the bottom.

✓	Location	ID	Last Name	First Name	Sex	SSN	DOB
<input checked="" type="checkbox"/>	Midtown Hospital	1003355	Jacobs	William	M	XXX-XX-9221	03/10/1932
Potential Matches							
<input type="checkbox"/>	Midtown Hospital	1004421	Jacobs	Bill	M	XXX-XX-9221	03/10/1932
<input type="checkbox"/>	_GOO	6	Jacobs	Bill	M	XXX-XX-9221	03/10/1932

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

This is a close-up of the "View Selected Charts" button from the previous screenshot. The button is highlighted with a red oval. The surrounding table structure is also visible, showing the "Potential Matches" section with the same two rows as before.

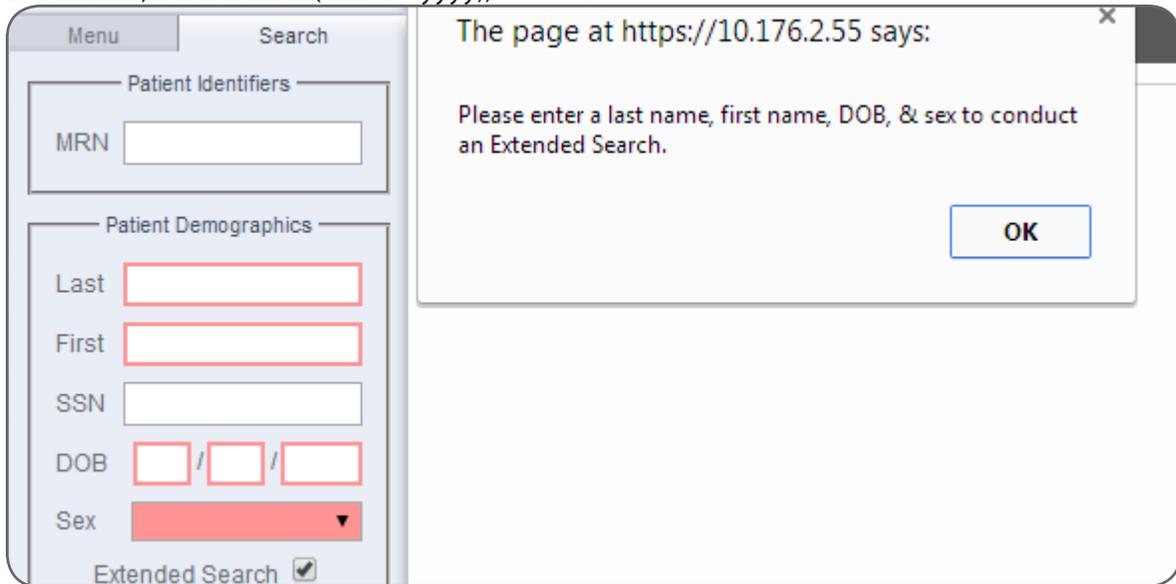
3. The **Patient Chart** will display and show how many aliases are currently represented in the patient chart (1) and how many total aliases there are for the patient (2). Click the number of aliases to return to the list of potential matches.

The screenshot shows a "Patient Chart" for "Williams M.D., Patrick" (DOB: 08/27/1976 - 38 Years Old M). Below the patient name, there is a section for "Aliases" with a red oval around the number "1". To the right of the "Aliases" section is a red button that says "HIE Sharing Refused".

Conduct an Extended Search

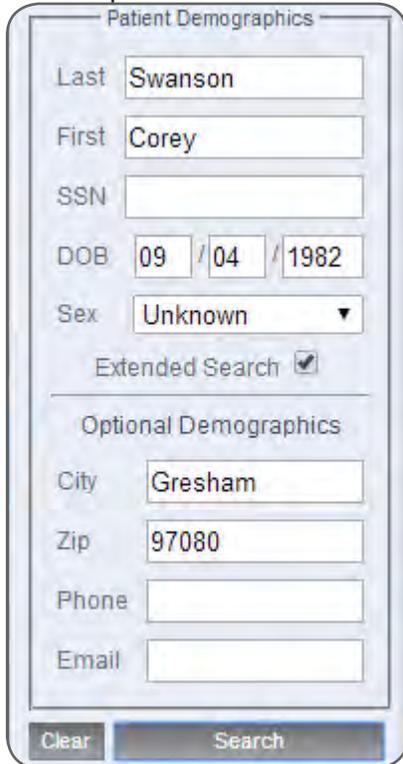
If your initial search returns no results or you believe records may exist outside of your community, perform an **Extended Search**. This allows you to search for patients who only have information in CareExchange.

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.



The screenshot shows a web application interface with a 'Search' tab. On the left, there are two sections: 'Patient Identifiers' with an 'MRN' input field, and 'Patient Demographics' with fields for 'Last', 'First', 'SSN', 'DOB' (mm/dd/yyyy), and 'Sex' (a dropdown menu). The 'Extended Search' checkbox is checked. A dialog box is overlaid on the right, titled 'The page at https://10.176.2.55 says:', containing the message: 'Please enter a last name, first name, DOB, & sex to conduct an Extended Search.' and an 'OK' button.

2. Enter required information and any **Optional Demographics** (City, Zip, Phone, Email) and click **Search**.



The screenshot shows the 'Patient Demographics' section of the search interface. The 'Last' field contains 'Swanson', 'First' contains 'Corey', 'DOB' is set to '09 / 04 / 1982', and 'Sex' is set to 'Unknown'. The 'Extended Search' checkbox is checked. Below this is the 'Optional Demographics' section, which includes fields for 'City' (Gresham), 'Zip' (97080), 'Phone', and 'Email'. At the bottom of the form are 'Clear' and 'Search' buttons.

- 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**.

PL: Community Search PC: MG: ADM:

Community Search

Results were found.

Swanson, Corey K
31 Years Old - 09/04/1982 - U

<input checked="" type="checkbox"/>	Location	ID	Last Name	First Name	Sex	SSN	DOB
<input checked="" type="checkbox"/>	Family	FAMILY060665450	Swanson	Corey	U	XXX-XX-8298	09/04/1982
<input checked="" type="checkbox"/>	_GOO	53	Swanson	Corey	U	XXX-XX-8298	09/04/1982
<input checked="" type="checkbox"/>	CareAlign Exchange	ncc7d0d53accef265	Swanson	Corey	UN		09/04/1982

View Selected Charts

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

- 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.

Show Inpatients Only | All / None / Toggle

MRN	Patient Name	DOB
GREEN81519931	Aguilar, Bessie O	07/27/1980
GREEN143576026	Cain, Nora A	02/02/1972

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

PL: Recent Lookups PC: Cain, Nora A MG: ADM:

Patient Chart

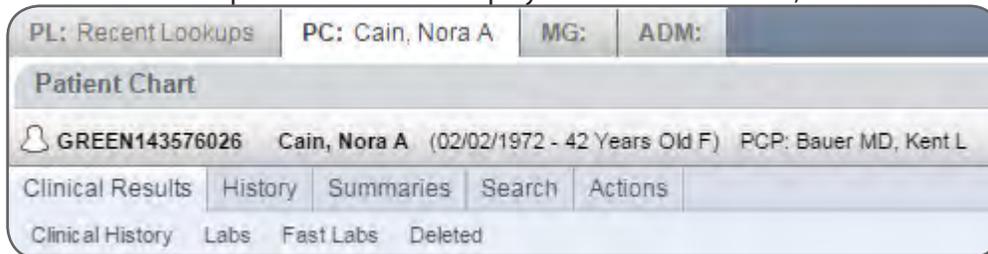
GREEN143576026 Cain, Nora A (02/02/1972 - 42 Years Old F)

Clinical Results History Summaries Search Actions

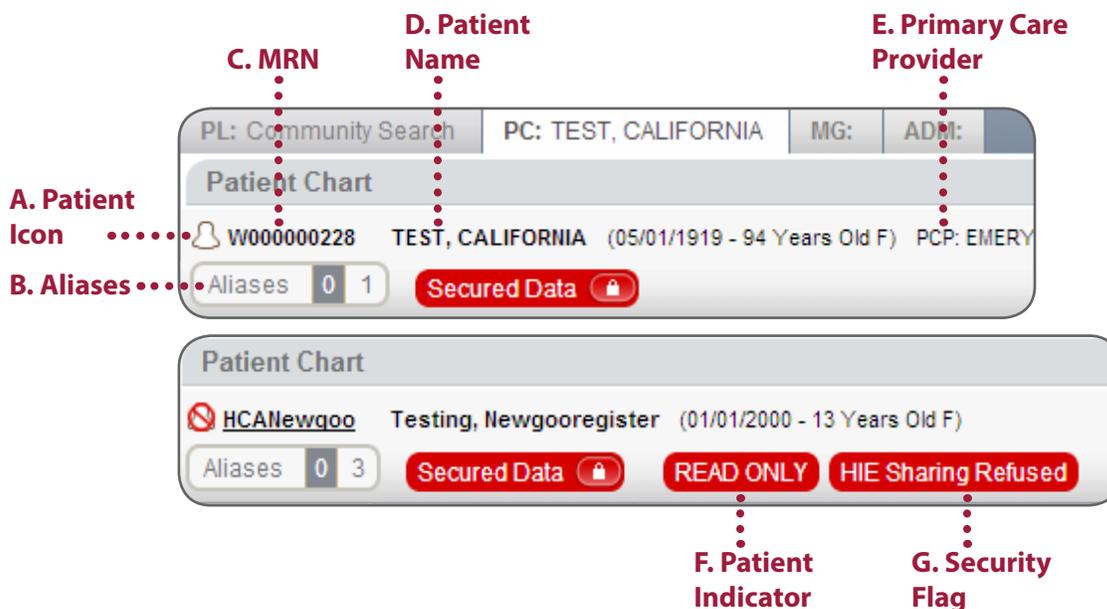
Clinical History Labs Fast Labs Deleted

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:

Demographics MIDTOWN443234984 - Key, Allison J (09/01/2002 - 11 Years Old F)

Patient Information

SSN: XXX-XX-0425
Religion: JEWISH
Phone (W): (924)843-5660 x3063
Phone (H): +1264 623 887 7297 x8534
Phone (C): +61 086 882 6243 x3147
Current Patient Address: 3117 Golden Brook Street, 8147 Hazy Day Lane, Newington, Connecticut 06131

Employment Information

Employer Phone: +244 419 815 3374 x9232

Guarantor

Guarantor Type: 01
Guarantor Name: Yates, Cindy Y
SSN: XXX-XX-4804
Guarantor Address: 9623 Sunny Timber St., 8523 Red Day Blvd., Corbin, Kentucky 40702
Guarantor Phone (H): (942)559-7649 x261

- 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.



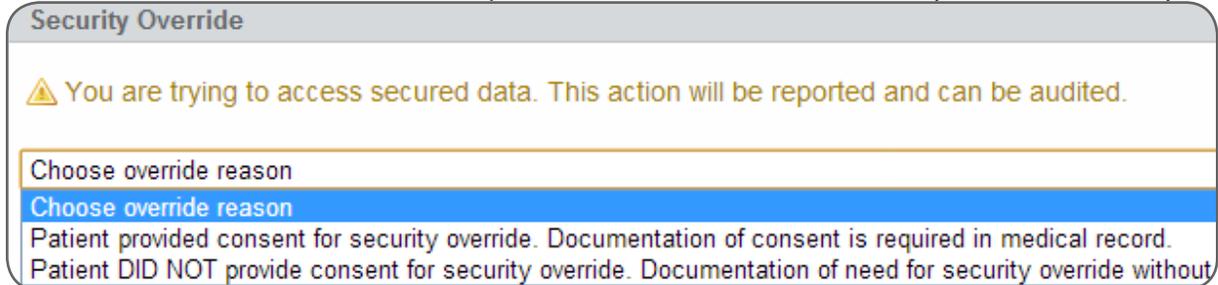
Invoke Security Override to View Secured Data

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.

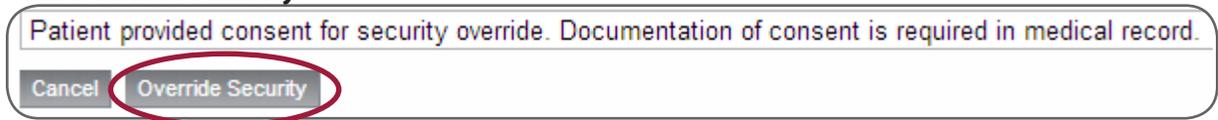
1. Click the lock on the **Secured Data** indicator.



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:

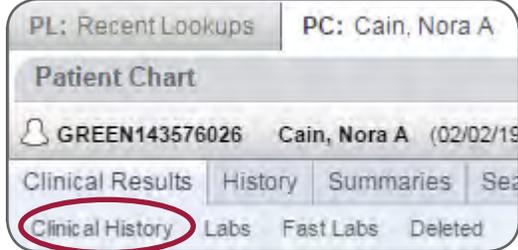
- Filter documents by All, My, or Document Type
- Move documents to a patient chart
- Move documents to a folder
- Delete documents
- View a document
- View lab results
- Access fast labs
- View and restore deleted documents

 *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.*

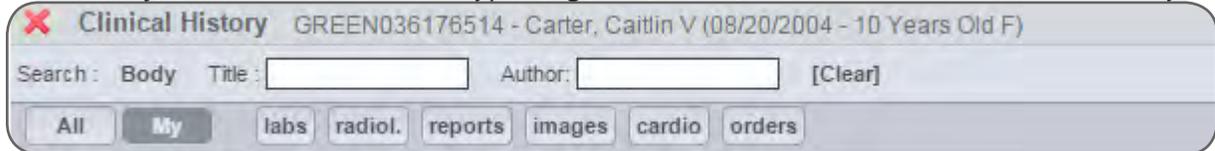


Filter Patient Documents

1. Access the patient's chart and go to **Clinical Results > Clinical History** to display the documents list.



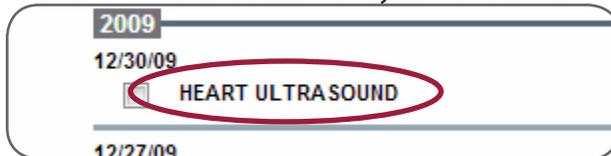
2. Click **All, My**, or one of the document types (e.g., labs, cardio). Documents will filter automatically.



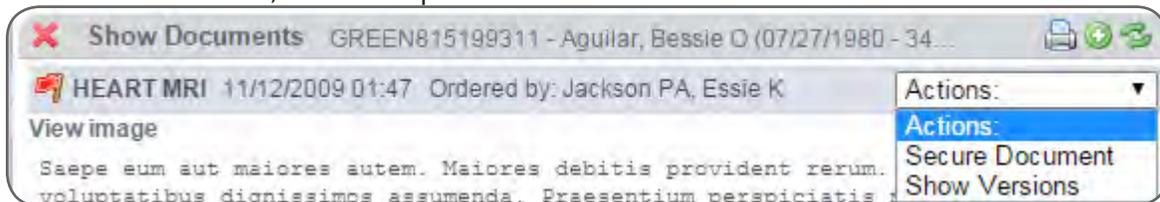
💡 Only document types present in a patient's clinical history from both CareAlign and CareExchange are visible.

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.

Document Versions

MICRO 11/23/1998 16:32:05 Ordered by: Velez LPN, Eula D

Vault	MRN	Date/Time	Category	Results	Ordered By
Midtown Hospital	MIDTOWN167379913	12/01/09 08:31	Microbiology	ICA_MICRO:	Velez LPN

MICRO 03/19/1988 14:38:48 Ordered by: Oconnor PA, Phillip O Version

Vault	MRN	Date/Time	Category	Results	Ordered By
Midtown Hospital	MIDTOWN167379913	12/01/09 08:31	Microbiology	ICA_MICRO:	Oconnor PA, Phillip O

3. Click the red X at any time to close the document and return to the documents list.

Show Documents GREENE

HEART MRI 11/12/2009 01:47

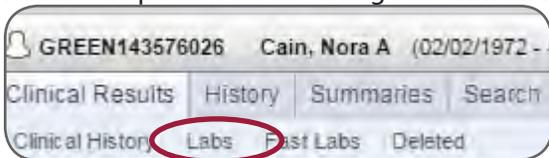
[View image](#)

Labs

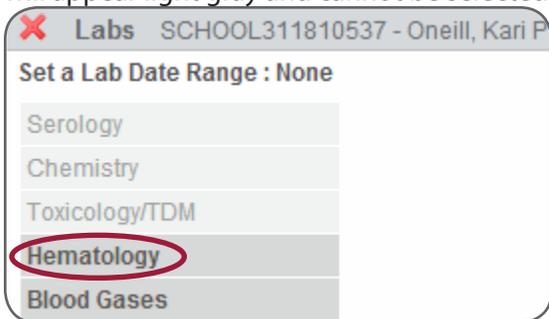
The Labs tab allows you to view all of a patient’s available lab results. All categories are displayed for each patient. **Lab Graphs** display Lab Results from one vault at a time to show changes in results over time.

View Lab Results

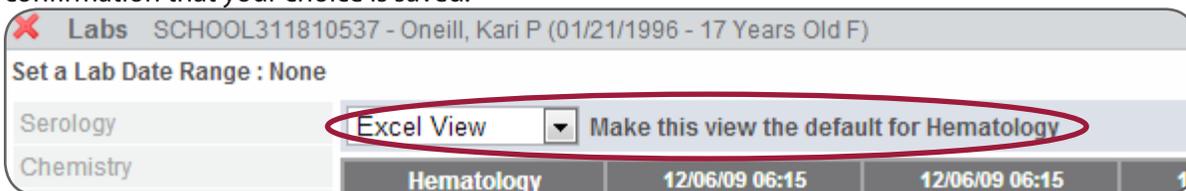
1. Access the patient’s chart and go to **Clinical Results > Labs**.



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.

Serology	12/29/09 13:37	12/29/09 13:37	09/29/09 06:22	09/29/09 06:22	07/12/09 04:54	07/12/09 04:54	06/12/09 04:54	
FREE CARNITINE, UR	-	-	-	216 C	-	-	-	
HEMOGLOBIN F	See 0 C	-	-	-	-	-	-	
OXYHEMOGLOBIN	-	HEMOGLOBIN F					-	5
LACTATE, WHOLE BLOOD	-	Test Value : See PERCENT					-	-
CHLORIDE	-	Accession # : 9402:S64225P					-	-
CITRATE, URINE	-	Verified Date/Time : 12/29/09 13:37					-	-
	-	Unit/Range : PERCENT(50.0-90.0)					-	-
	-	Ordered By : Conley MD, Sammy S					1548 Δ C	-
	-	Performed At : Doctor Frankenstein's Lab						
	-	Lab Address : 7858 Red Hills Blvd., Lake Oswego, Oregon 97035						

Labs Views

Lab results are displayed in one of the following five views:

Grid View

Grid View <input type="checkbox"/> Make this view the default for Pathology				
Pathology	SERUM A1A	CALCIUM PER DAY, UR	SODIUM, SERUM	Ordered By :
11/15/09 12:02	123 C	-	-	Barr PA, Virginia P
10/11/09 20:35	-	See 0 C	-	Odom MD, Lorena W
04/09/09 02:05	-	-	See 0 C	Barber MD, Melissa P

Excel View

Excel View <input type="checkbox"/> Make this view the default for Pathology			
Pathology	11/15/09 12:02	10/11/09 20:35	04/09/09 02:05
SERUM A1A	123 C	-	-
CALCIUM PER DAY, UR	-	See 0 C	-
SODIUM, SERUM	-	-	See 0 C

Expanded View

Expanded View <input type="checkbox"/> Make this view the default for Pathology					
Pathology					
Received:	11/15/09 [12:02]				
Ordered By:	Barr PA, Virginia P				
Accession:	5289:L83505P				
MRN:	SCHOOL311810537				
Vault:	School of Medicine				
Test	Battery	Value	Flag	Unit	Range
SERUM A1A	Battery - A1-ANTITRYPSIN	123 C		mg/dL	100-190

Spread View

Spread View <input type="checkbox"/> Make this view the default for Pathology	
11/15/09 12:02 - 5289:L83505P	SERUM A1A 123 mg/dL (100-190)
10/11/09 20:35 - 5708:W16504V	CALCIUM PER DAY, UR See mg/d (100-300)

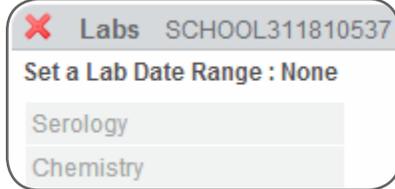
Grid View 2

Grid View 2 <input type="checkbox"/> Make this view the default for Pathology		
Pathology	SERUM A1A	CALCIUM PER DAY, UR
04/09/09 02:05	-	-
10/11/09 20:35	-	See 0 C
11/15/09 12:02	123 C	-



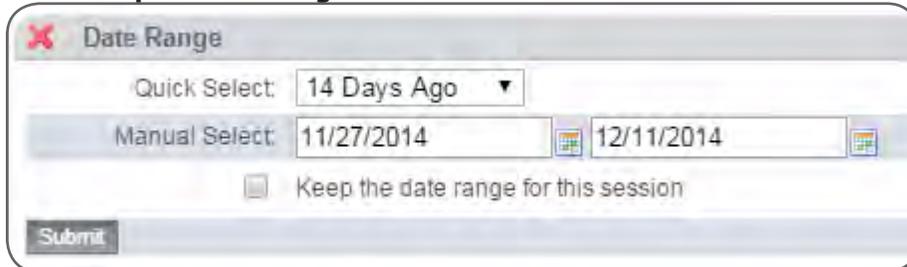
Select a Date Range for Labs Results

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



X Labs SCHOOL311810537
Set a Lab Date Range : None
Serology
Chemistry

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.



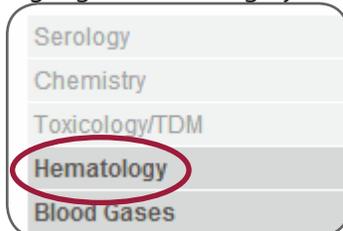
X Date Range
Quick Select: 14 Days Ago
Manual Select: 11/27/2014 12/11/2014
 Keep the date range for this session
Submit

3. Click **Submit**.

View Lab Graphs

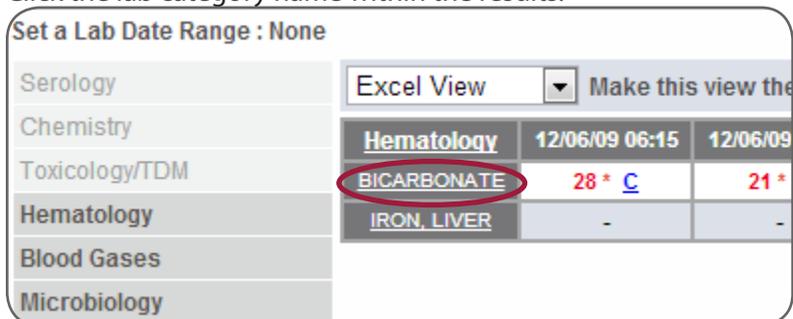
Lab Graphs display lab results and allow you to see changes in results over time. You will only be able to view results from the vault you are in. Not all CareAlign client systems have this feature. Contact your System Administrator with questions about whether you have access to lab graphs.

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



Serology
Chemistry
Toxicology/TDM
Hematology
Blood Gases

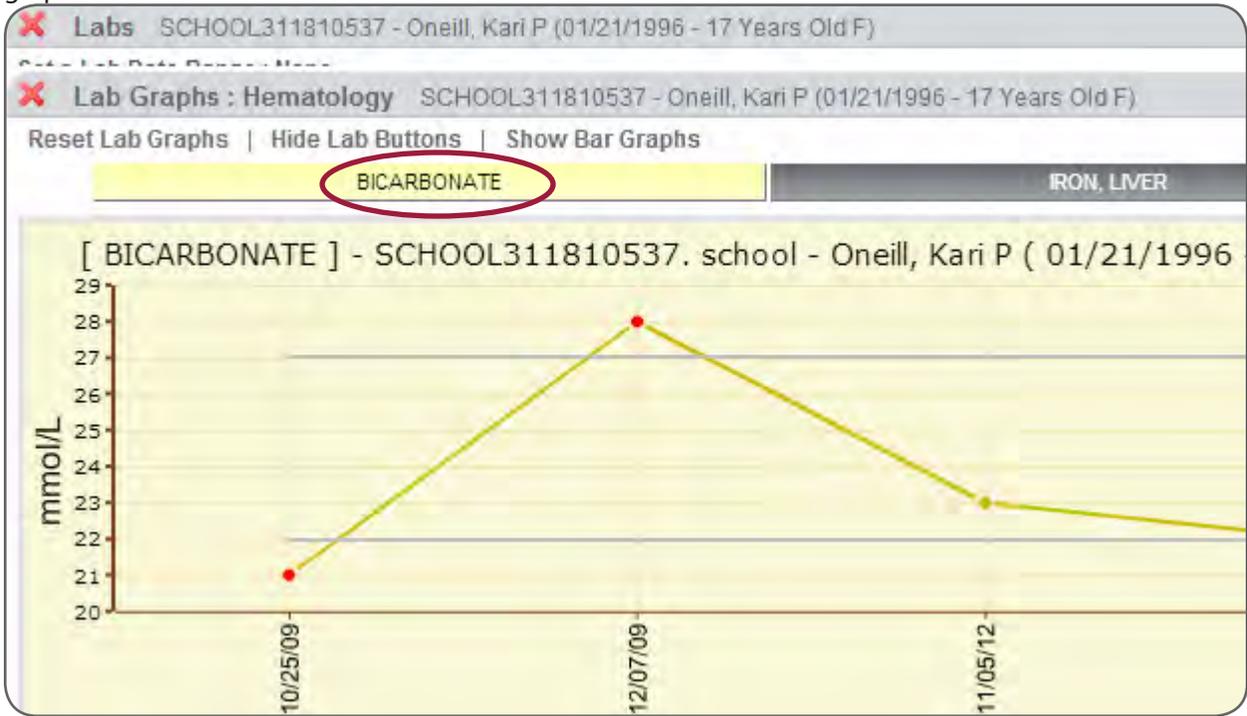
2. Click the lab category name within the results.



Set a Lab Date Range : None
Excel View Make this view the
Serology
Chemistry
Toxicology/TDM
Hematology
Blood Gases
Microbiology

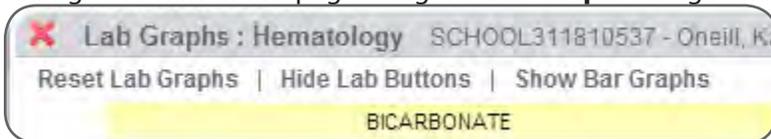
Hematology	12/06/09 06:15	12/06/09
BICARBONATE	28 * C	21 *
IRON, LIVER	-	-

- 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.



Gray lines signify the normal or desired range for results. Values outside this range display as red dots.

- 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

- 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.

General Settings

Demonstration Mode ⓘ

Profile Settings

Email Address

Display Settings

After Logging In...

In the Patient List (PL) tab...

When Opening a Patient Chart...

Show Patient History

Show Patient Summary

Other Settings

Patients Per Patient List Page...

Date Range for Filtering Fastlabs Results...



Patient History

Patient History allows you to view the following historical patient information:

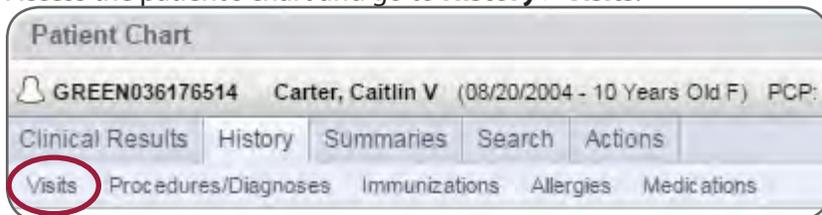
- Visits
- Procedures/Diagnoses
- Immunizations
- Medications

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

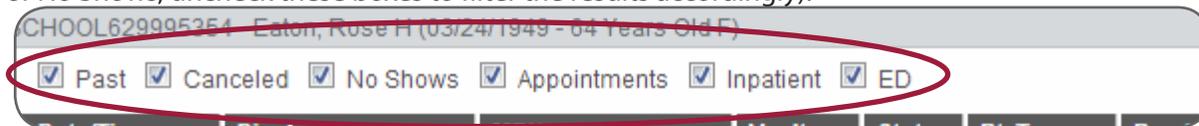
1. Access the patient's chart and go to **History > Visits**.



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.

The screenshot shows a detailed view of a visit. The 'ACCT No.' 'PA603797182' is circled in red. The table has columns for 'ACCT No.', 'Visit Date/Time', 'Discharge', 'MRN', 'Vault', and 'Status'.

ACCT No.	Visit Date/Time	Discharge	MRN	Vault	Status
PA603797182	11/21/2008 17:46:12	11/21/2008 23:59:59	SCHOOL629995354	School of Medicine	CLS
PA880560380	11/21/2007 22:50:25	01/28/2008 12:10:22	SCHOOL629995354	School of	



- You will see a **Visit Summary** that shows available patient information, including medications, immunizations, diagnoses and procedures, allergies, and documents associated with that visit.

✖ Visit Summary (PA603797182)

Guarantor

Guarantor Name: Erickson, Kelly W
SSN: XXX-XX-9058
Guarantor Address: 1470 Sunny Day Boulevard, 1257 Rosa Day Lane, Campton, New Hampshire 03285
Guarantor Phone (H): +1441 189 229 0496 x6724
Guarantor Phone (W): +229 876 594 1901 x609

Insurance

Insurance Name	Insurance Plan	Contact Information
qui sit possimus sint non		1302 Golden Brook Dr., 5734 Red Forest Boulevard, Cherokee

Next of Kin

NOK Name	NOK Contact Phone	NOK Address
Leach, Tyrone W	+355 780 408 7673 x601	1392 Sunny Blossom Boulevard, 3620 Bright Blossom St., Gu
Long Jr., Todd C	+20 890 558 1101 x508	2655 Misty Creek Boulevard, 7936 Shady Hills Lane, Lowell, Ir

Emergency Contact

Contact Name	Phone Number	Address
Weaver, Eloise E	+375 937 332 9067 x617	8775 Golden Day Boulevard, 8583 Rosa River Dr., Apple Va
Coffey, Shari D	+1684 135 603 9235 x3386	3546 Golden Blossom Drive, 7175 Rosy Timber Dr., Barton

Medications

i There is no medication data for this visit.

Immunizations

i There is no immunization data for this visit.

Diagnoses/Procedures

Diagnoses

MRN	Vault	Date	Loc
SCHOOL629995354	School of Medicine	04/25/2008	FR

Procedures



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.

Documents	
Date	Document
09/17/2009 08:17	PELVIS SCAN
06/29/2009 14:06	VASCULAR LATERAL
05/24/2009 04:48	NERVE FILM - Draft
05/20/2009 02:27	KNEE MAMMOGRAM

2. Enter the correct MRN and click **Move Visit**.

Move Visit (PA243948359)

Visits can only be moved within the same vault. This visit is in vault **Family**. You may only move it to another patient in **Family**.

Move this visit to MRN:

The following documents were automatically identified as documents associated with this visit.

In addition to those documents automatically identified, there are some other documents that may be relevant to this visit. Please carefully examine these documents and select the documents that should be moved.

Date	Document	Provider		Date	Document	Provider
12/27/2009 13:57	THORACIC INSERTION	Greer PA, Natasha L				
11/27/2009 07:38	FETAL HISTORY - Draft	Ortiz MD, Latasha L	<input type="checkbox"/>	12/28/2009 23:01	Lab - Battery - IMIPRAMINE, Battery - NL COOX AVOG, Battery - NL GAS LYTE COOX, Battery - PROT ELECTROPHORESIS	Mercer MD, Alfonso H
			<input type="checkbox"/>	12/24/2009 10:51	Lab - Battery - HEMATOCRIT FOR RBC FOLATE, Battery - NL COOX LACTATE, Battery - RETIC CT BY FLOW CYTOMETRY, Battery -	Riddle MD, Gwendolyn J

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**.

Documents	
Date	Document
09/17/2009 08:17	PELVIS SCAN
06/29/2009 14:06	VASCULAR LATERAL
05/24/2009 04:48	NERVE FILM - Draft
05/20/2009 02:27	KNEE MAMMOGRAM

Move This Visit **Secure Account**

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

Secure Visit

Select the security flags you want to apply.

New Flag

HIV/AIDS

Sensitive Results

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).

Procedures/Diagnoses SCHOOL311810537 - Oneill, Kari P (01/21/1996 - 17 Years Old F)							
Diagnoses							
MRN	Vault	Date	Location	Attending	Type	Code	Diagnosis
SCHOOL311810537	School of Medicine	08/14/2011	FRC	Walls MD, Virgil P	Guess	953.9	Reprehe repudiar nulla.
SCHOOL311810537	School of Medicine	06/22/2008	FRH	Rodriquez PA, Stephen B	Admiting	117.6	Distinctio sunt pari
Procedures							
MRN	Vault	Date	Location	Attending	Code	Description	
SCHOOL311810537	School of Medicine	04/26/2011	FRC	Walls MD, Virgil P	N0101	dicta provident consequuntur quaerat	
SCHOOL311810537	School of Medicine	08/13/2011	FRH	Rodriquez PA, Stephen B	X7974	praesentium est in rem	



Immunizations

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

X Immunization History SCHOOL307204989 - Carter, Israel D (08/09/1990 - 23 Years Old M)						
MRN	Vault	Immunization	Series	Dose	Manuf.	Lot
SCHOOL307204989	School of Medicine	rotavirus, pentavalent			MSD	#VZHDMM
SCHOOL307204989	School of Medicine	Hep B, NOS	2	35	CSL	#MCCGIJ

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).

X Medications SCHOOL307204989 - Carter, Israel D (08/09/1990 - 23 Years Old M)						
Active Medications		Medication History				
System Medications						
MRN	Vault	Medication	Packaging	Start Date	Route	Dosage
SCHOOL307204989	School of Medicine	+ DARVOCET N 100 TABLETS 650/100	100 BOT	02/27/2012	ullam autem libero	650mg
SCHOOL307204989	School of Medicine	+ MEGESTROL ACETATE TABLETS USP	500 BOT	04/18/2010	inventore et distinctio	30cc
SCHOOL307204989	School of Medicine	+ CLINDAMYCIN HYDROCHLORIDE CAPLETS	30 BOT	01/04/2009	ex magni autem	60ml
SCHOOL307204989	School of Medicine	+ ZYRTEC-D 12 HOUR TABLETS 5/120	280 DOSE BOT	03/07/2007	esse alias quae	30cc

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

Medication

- + DARVOCET 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**.

The screenshot shows the 'Patient Chart' interface for a patient named Jasmine F. Little. The patient's MRN is FAMILY915697927. The interface includes tabs for Clinical Results, History, Summaries, Search, and Actions. The 'Patient Summary' tab is highlighted with a red circle.

2. Click Patient Summary.

The screenshot shows the 'Patient Summary' page for Carter, Israel D. The patient's MRN is SCHOOL307204989. The page is divided into two main sections: System Medications and Active Allergies.

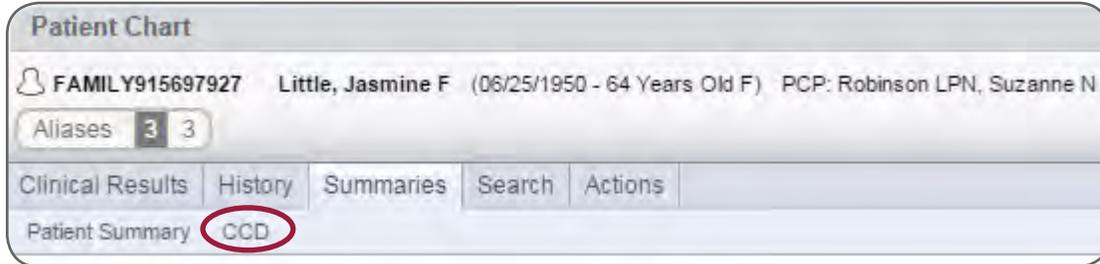
MRN	Vault	Medication	Packaging	Start Date	Route	Dosa
SCHOOL307204989	School of Medicine	PERPHENAZINE TABLETS	1 X 499 BAG	08/31/2006	eum illo atque	2 tablet
SCHOOL307204989	School of Medicine	LAMOTRIGINE TABLETS	1000 BOT	07/18/2006	nulla cumque neque	650m
SCHOOL307204989	School of Medicine	GABAPENTIN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

MRN	Vault	Description	Type	Severity	Reaction	Onset	R
SCHOOL307204989	School of Medicine	KENTUCKY BLUEGRASS	Pollen Allergy	Severe	VOMITING	11/17/1997	1
SCHOOL307204989	School of Medicine	FALLING ROCKS	Environmental Allergy	Moderate	ITCHING	10/01/1994	1
SCHOOL307204989	School of Medicine	EVIL	Miscellaneous Allergy	Mild	SWELLING	10/05/2002	1
SCHOOL307204989	School of Medicine	PACEMAKER	Miscellaneous Contraindication	Mild	ITCHING	09/25/1995	0

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**.

Patient Chart

SCHOOL307204989 Carter, Israel D (08/09/1990 - 23 Years Old M)

Clinical Results History Summaries Search Actions

Patient Chart Lab Lookup

X Search Patient Chart

- Look for multiple words by placing spaces between them.
- Use the wildcard, "*", before or after a word. For instance, "abdom*" will match both "abdomen" and "abdomi".
- Place quotation marks around full phrases like "phenergan nausea".

Query:

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.

X Search Patient Chart

MIDTOWN443234984 Key, Allison J

KNEE SCAN 06/01/2009 20:39 By: Harrison LPN, Marilyn K

Voluptate maiores explicabo dolorum molestias quia. Nihil possimus voluptas deserunt consequatur. Esse saepe tenetur quaerat voluptas blanditiis qui inventore eum. Velit qui temporibus quod ad rerum voluptatem. Asperiores earum at qui deleniti et. Velit voluptatibus modi quibusdam. Dolorem voluptatem cum delectus. Quam officia voluptas molestiae officia adipisci sunt sapiente. Quod aut est aut quidem. Est omnis suscipit delectus. Inventore modi et ut qui ab. Molestias ut ut rerum vel omnis qui voluptatem rem. Dolorem voluptatem sequi iusto dolores nam itaque. Hic id voluptatum ratione. Esse et ipsam consequatur delectus voluptatem. Omnis velit dignissimos ut. Ullam earum eveniet et molestiae eum ut vel est. In sed aut amet odio voluptatem consequatur. Quia itaque optio fugit. Distinctio cum et nihil et **laborum** quam eos vel. Aut quis praesentium ab dicta qui aperiam est. Tenetur magnam quod hic ab animi qui provident omnis. Ipsam dolores aliquam id nostrum. Dolor reprehenderit praesentium blanditiis. At odit suscipit quidem omnis nulla velit ex. Maxime dolorem hic provident qui voluptate quisquam facere. Dolore temporibus autem animi. Repellendus et consequatur amet dolorem. Autem enim quos at voluptas ut. Enim voluptatem numquam numquam sunt. Occaecati ut omnis aspernatur id ut. Error voluptatem perferendis aut amet. Deserunt harum occaecati recusandae non ipsam. lure ullam facere ab. Quam nulla rerum quidem et **laborum** dolorem repellat reprehenderit. Et voluptatem doloremque incidunt omnis. Voluptatum fugit dignissimos ut in **laboriosam** non. Amet beatuae sint vel nulla quis

Using Secure 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:

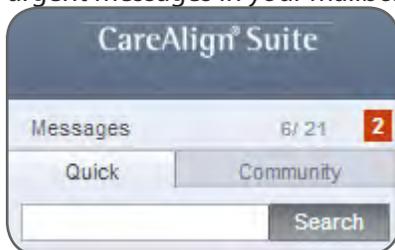
- For instructions on creating a mailbox for a new CareAlign user, see [Account Administration](#).
- For instructions on creating a mailbox for an existing CareAlign user, see [Message Administration](#).

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:

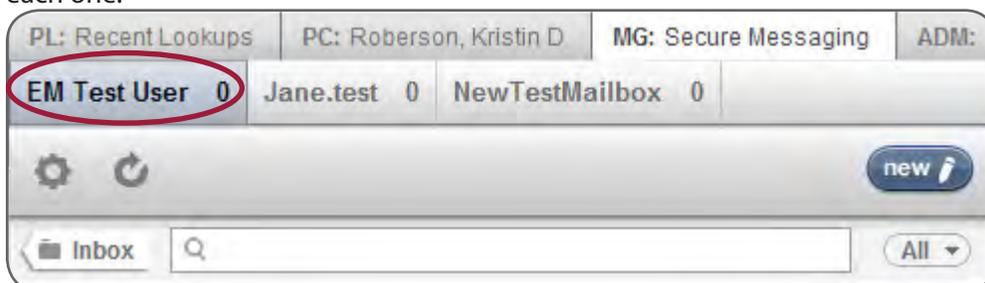
- [View Messages](#)
- [Search your Mailbox for a Message](#)
- [Understand Message Indicators](#)
- [Manage and Reply to Messages](#)
 - » [Compose and Send a Message](#)
 - » [Add an Attachment](#)
 - » [Save a Message as a Draft](#)
 - » [Archive a Message](#)
- [Use the Address Book and Manage Favorites](#)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

View Messages

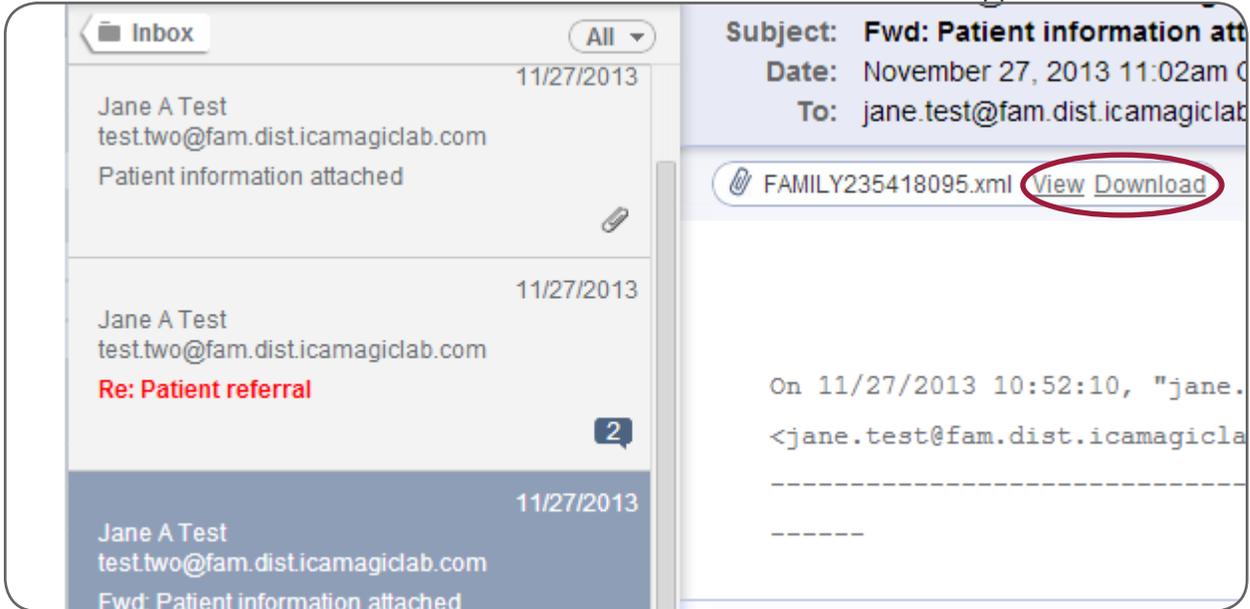
1. When you log in to CareAlign, you will see a message notification above the search bar. The number of urgent messages in your mailbox will be highlighted in red.



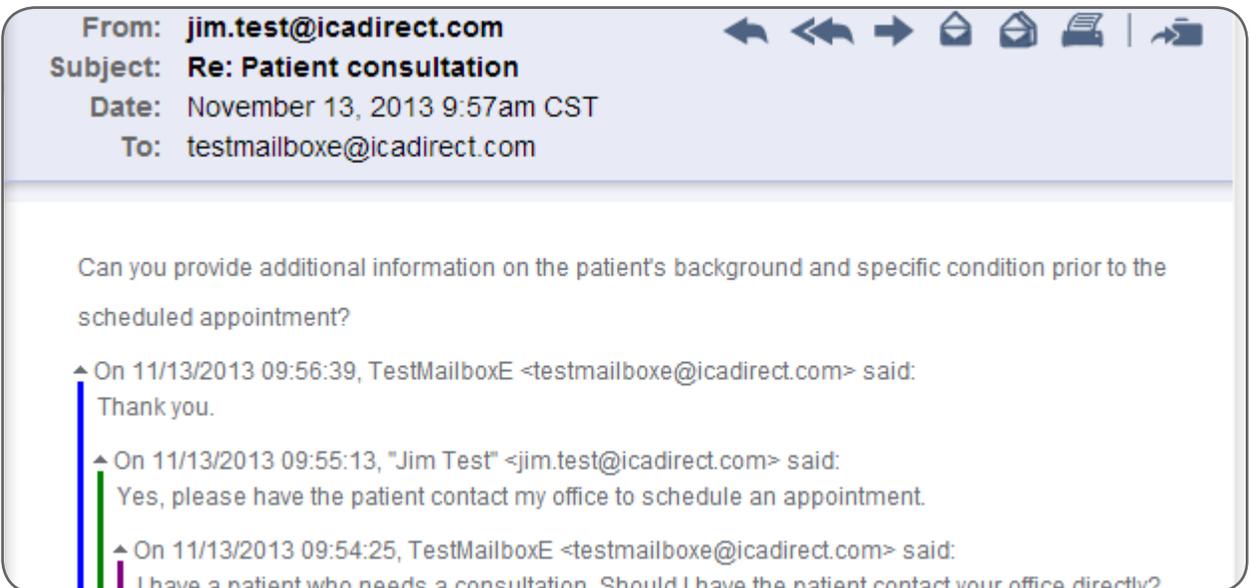
2. Click inside the message notification bar or go to **Secure Messaging** in the side navigation to access your default inbox in the MG tab. If you have access to more than one mailbox, you will see **tabs** for each one.



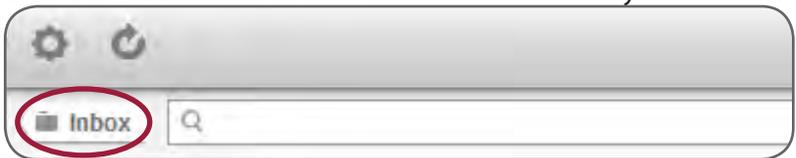
- Click a message in the email list to display that email in the reading pane. If patient information is attached, click **View** or **Download** to access the attachment. The download will appear in XML format.



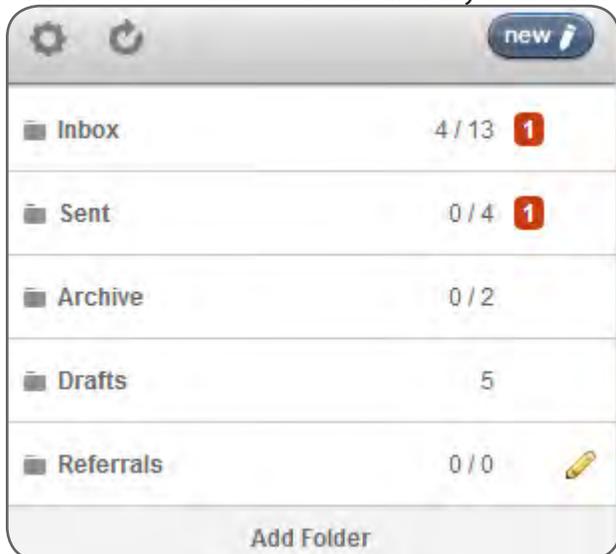
💡 *Emails in Secure Messaging are stored as threads, which include replies and forwards so that you can easily view entire conversations with one click. Replies are hierarchically expanded in the message pane and identified by graduating, indented color bars so that individual messages are easy to identify.*



- 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.

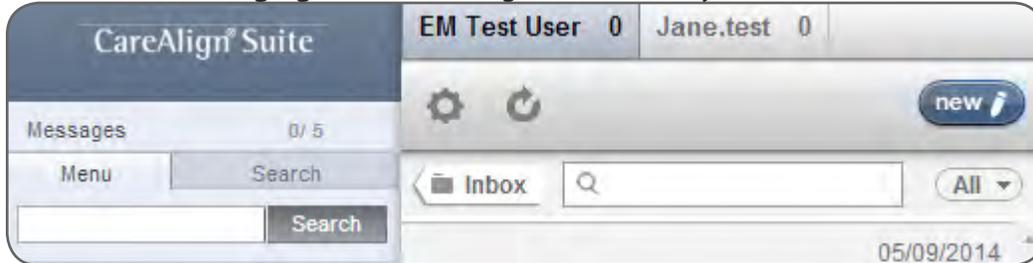
7. Click the **refresh** icon to manually refresh your mailbox and load any new messages. Your mailbox will also automatically refresh at regular intervals.



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.



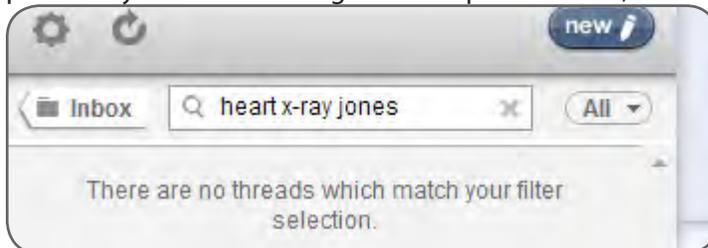
2. Enter terms in the search bar to search the following fields:

- 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.

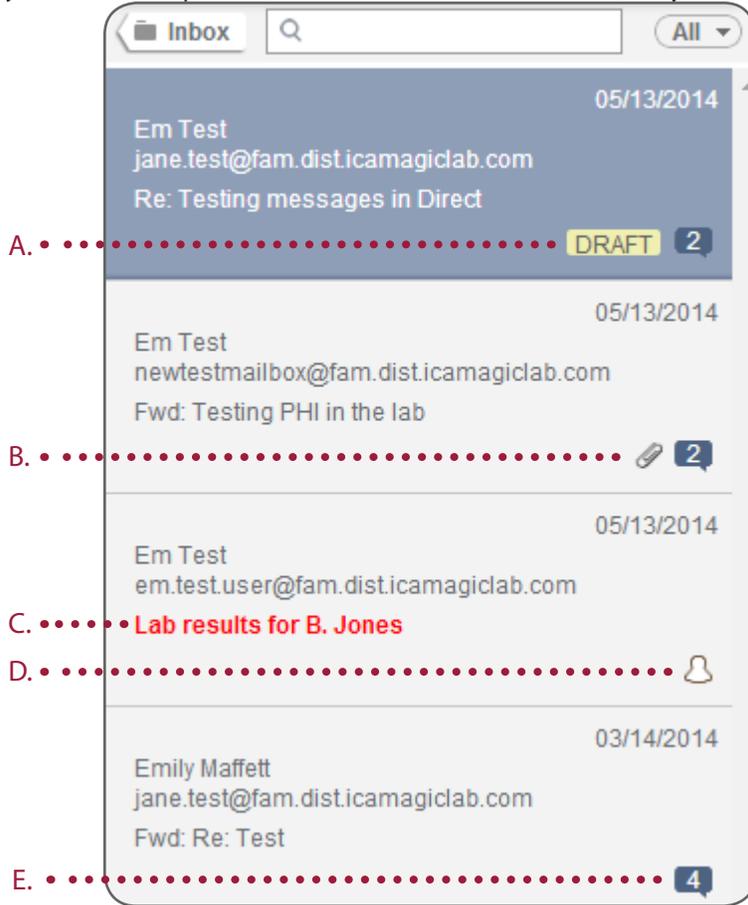


4. Messages that match your search terms will appear. In the example shown below, the term appears in the attached CCD.



Message Indicators

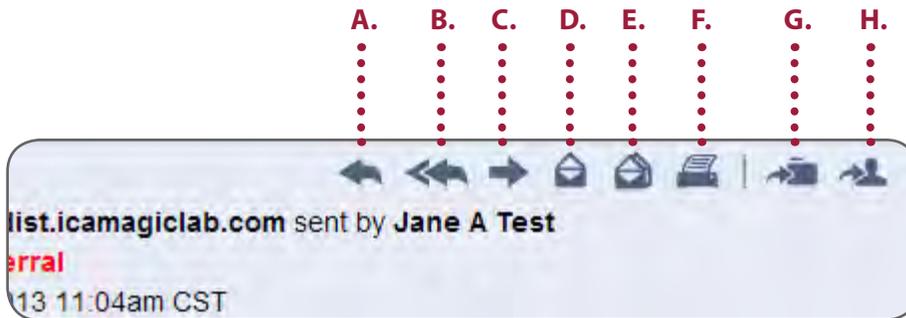
A variety of indicators provide information about the emails in your mailbox:



- 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

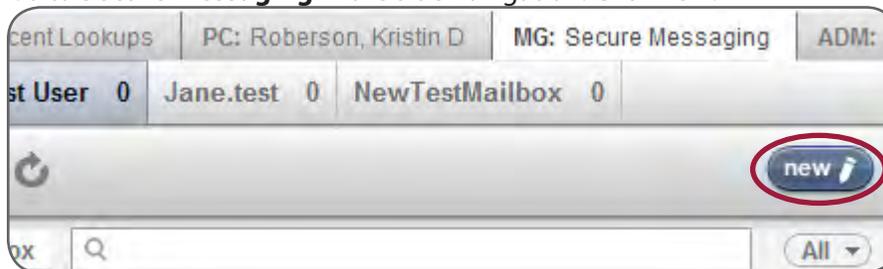
When viewing a message in the reading pane, use the icons at the top of the email to do the following:



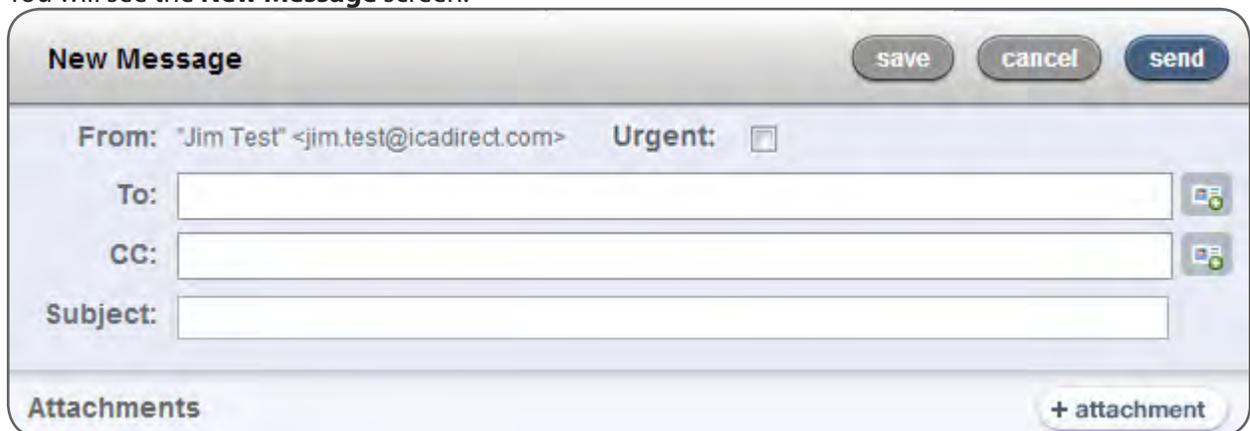
- A. **Reply** to the sender
- B. **Reply to all**
- C. **Forward** the email to another recipient
- D. **Mark the message as unread**
- E. **Mark the thread as unread**
- F. **Print** the thread
- G. **Move** the message thread to a folder
- H. **Save** the message thread to the CareAlign patient chart

Compose and Send a Message

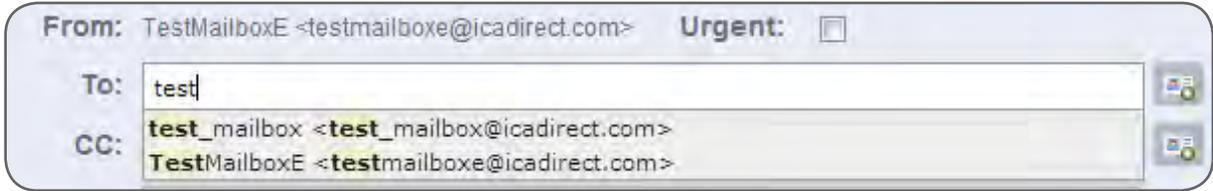
1. Go to **Secure Messaging** in the side navigation. Click **new**.



2. You will see the **New Message** screen.

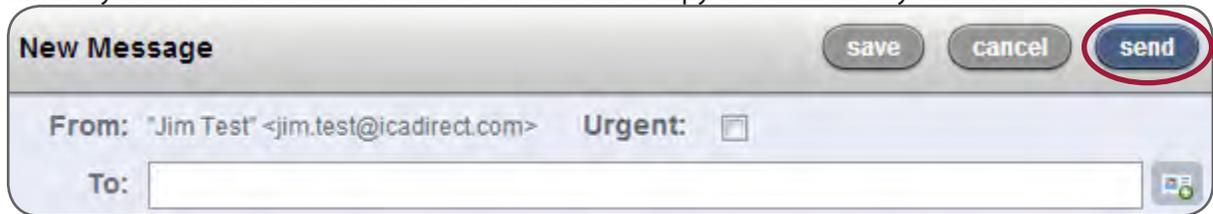


- Click in the **To:** field to enter a recipient. When drafting a new secure message, you can populate the "To:" field in three different ways:
 - Enter the user's email address manually
 - Choose a user from your favorites
 - Search for a user

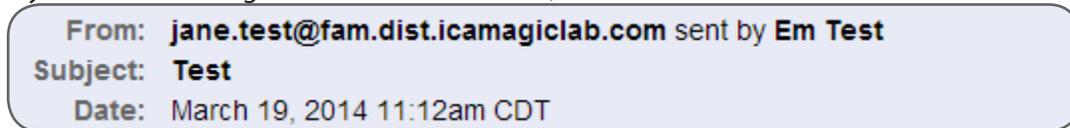


See *Using the Address Book* for information on populating and using your address book.

- Enter a **Subject:** and body text. Add any **Attachments.** Check **Urgent** if your message is urgent.
- Review your email and click **Send.** You can now see a copy of the email in your **Sent** folder.



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

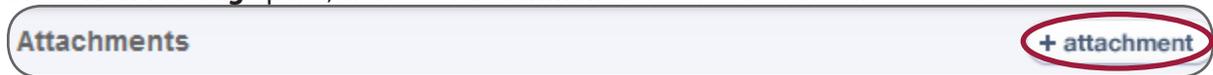


Add an Attachment

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



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



- 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.

- **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.

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.

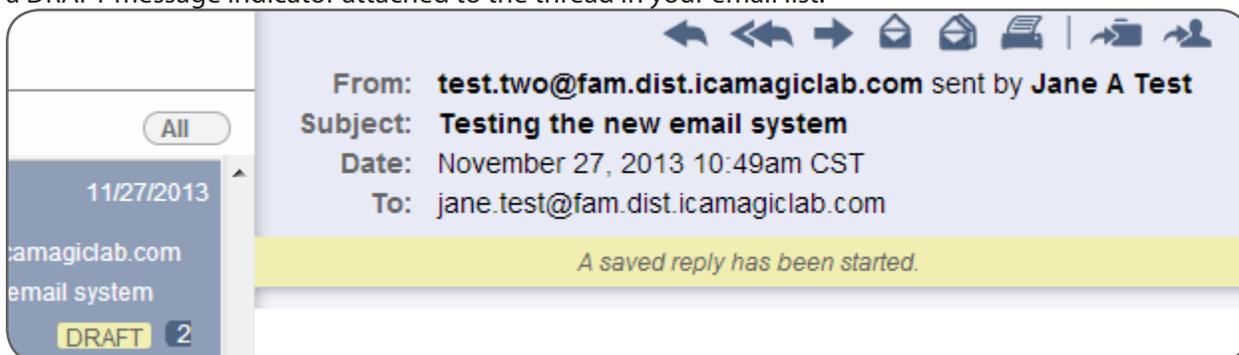
Save Message as a Draft

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.

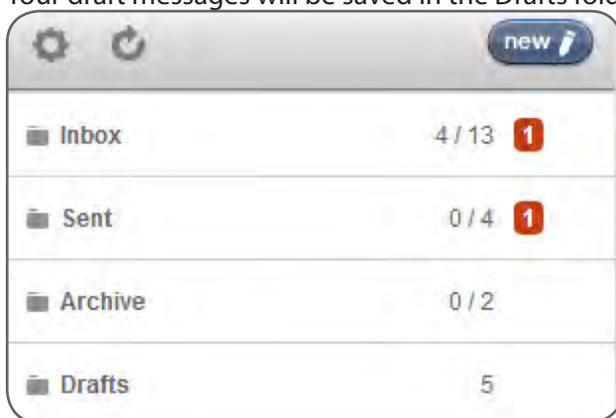
1. At the top of the **New Message** screen, click the **save** button.



- 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.



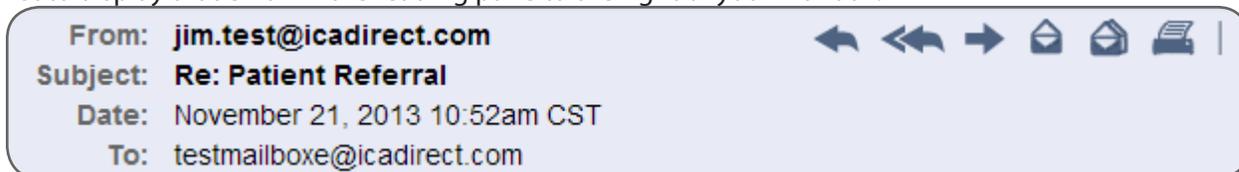
- Your draft messages will be saved in the Drafts folder.



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.

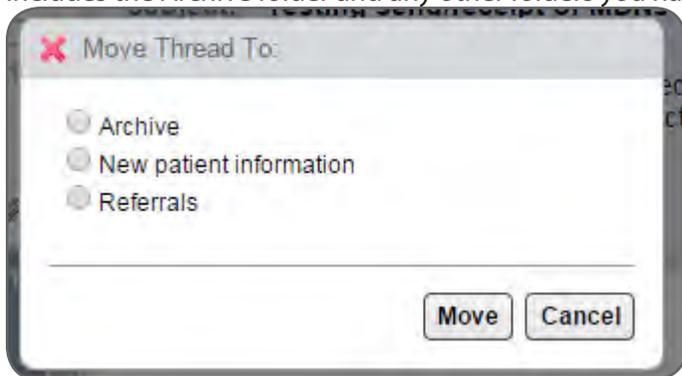
- Once you have selected Secure Messaging and you are in your mailbox, click a message in the email list to display that email in the reading pane to the right of your mailbox.



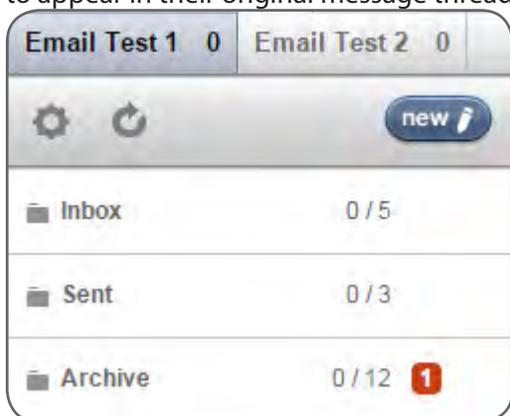
- When viewing a message in the reading pane, click the icon shown below to **Move** the message thread to a folder.



- 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**.



- 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

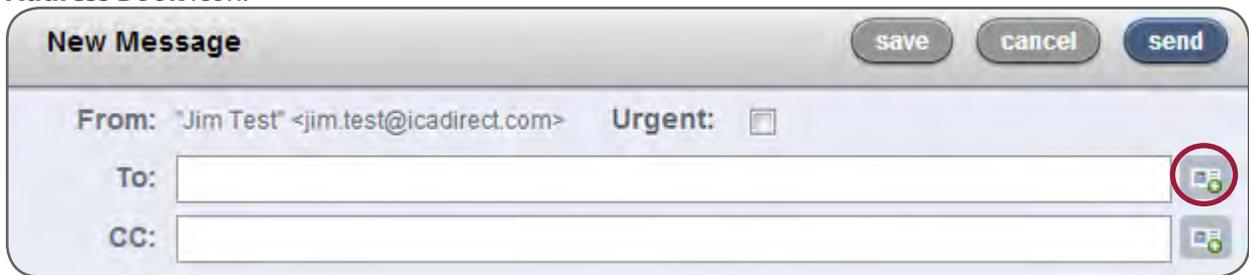
Search for a User

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

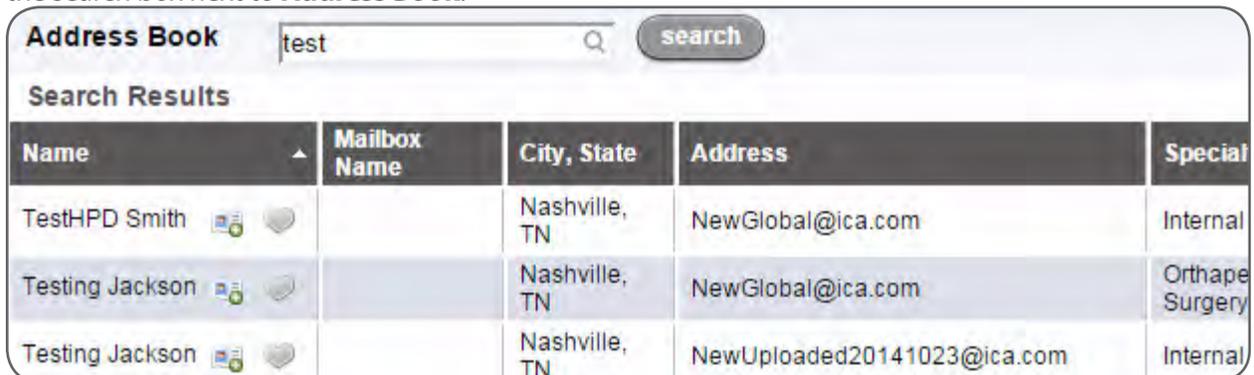
- Email Address
- Vault Code
- Mailbox Name
- First Name
- Last Name
- Company Name
- Address1
- Address2
- City
- State
- Zip Code
- Specialty
- Provider Type
- NPI



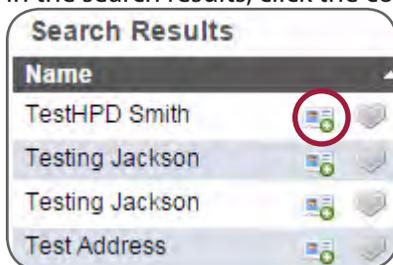
1. Go to **Secure Messaging** in the side navigation and click **new**. In the **New Message** pane, click the **Address Book** icon.



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**.

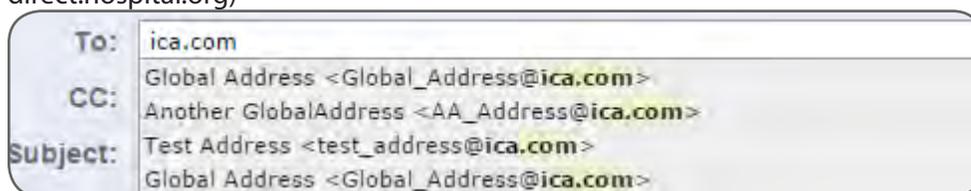


3. In the search results, click the contact icon to add the mailbox to the **To:** field of your email.



4. Users can also search for the following information in the Address Book Search field and in the To:/CC: fields:

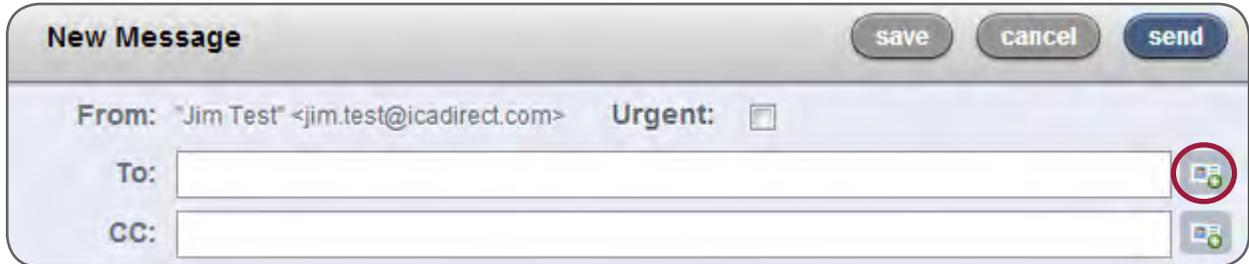
- Personal favorites
- Addresses in the current vault
- Addresses published from other vaults
- Global addresses
- Direct address domain (e.g., doctor@direct.hospital.org would be returned when searching for direct.hospital.org)



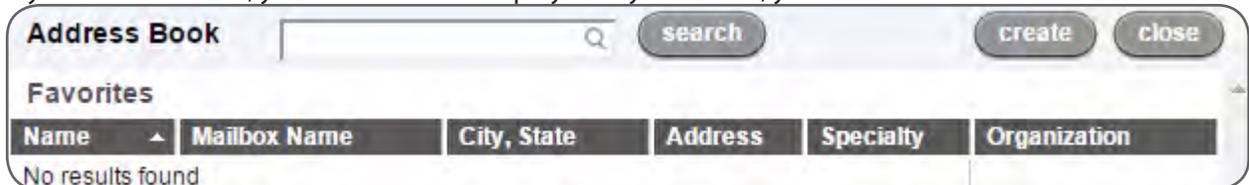
Manage Favorites

Add a Favorite

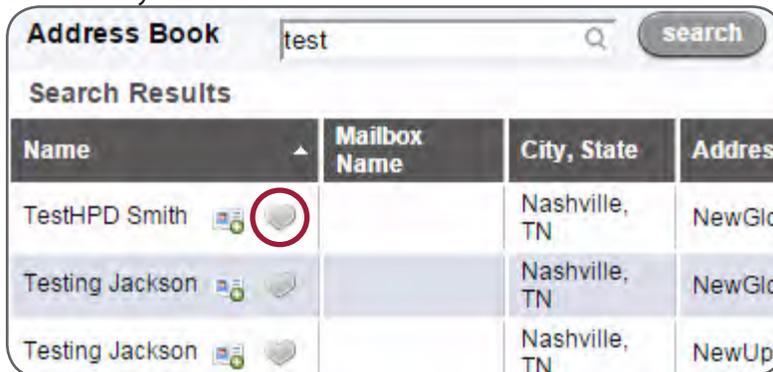
1. Go to **Secure Messaging** in the side navigation and click **new**. In the **New Message** pane, click the **Address Book** icon.



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



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.

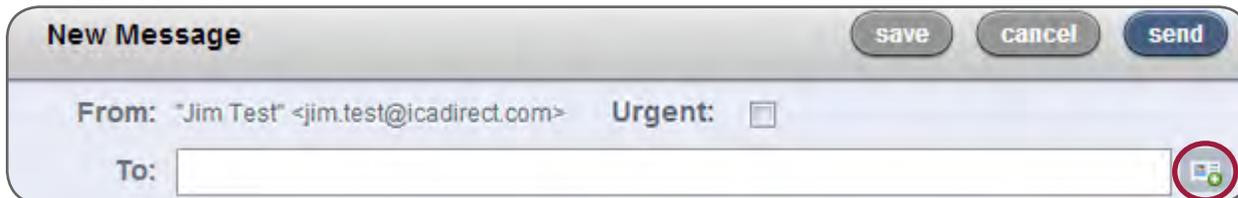


4. You will see the heart icon turn red.

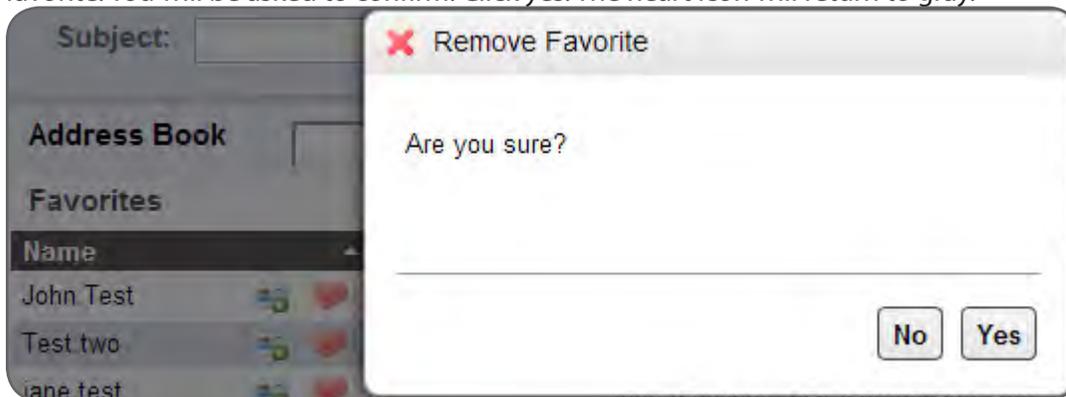


Remove a Favorite

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



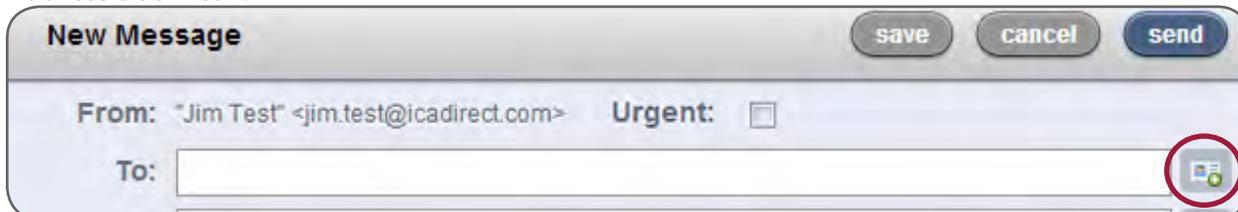
2. You will see a list of your favorites. Click the red heart icon next to the mailbox name to remove a favorite. You will be asked to confirm. Click yes. The heart icon will return to gray.



💡 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.



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



- Click the contact icon to enter that email address in the **To:** field of your email.

To:

CC:

Subject:

Address Book

Favorites

Name	Mailbox Name	City, State	Address	Specialty
Carol Oot   		Nashville, TN	global_address@msn.com	

Create a Favorite

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

To:

CC:

- Click **create**.

Address Book

- 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**.

New Favorite Address

First Name

Last Name

Address *

City

State

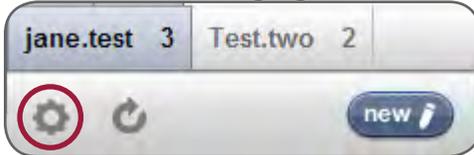
Specialty

 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.

General

Address emily.maffett@fam.dist.icamagiclab.com

Receive Message Notifications? Your email address is Emily.maffett@icainformatics.com.

Shared Users

User Settings

Default Mailbox You do not have a default mailbox.

Message Signature

Provider Directory

Publish?

City & State

Specialties

Auto Forwarding

Keep a copy?

Recipients

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

Receive Message Notifications? Your email address is jane.test@fam.dist.icamagiclab.com

Shared Users John A Test (john.test) ✕

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

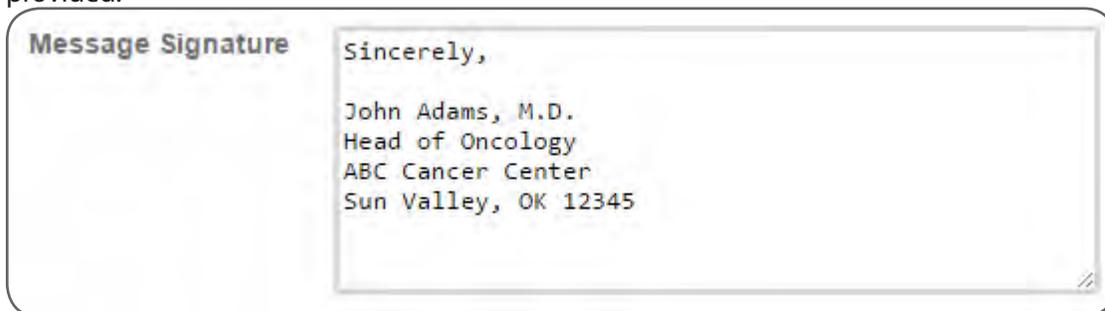
1. Check the box next to **Default Mailbox** to set that mailbox as your default. If you are currently in your default mailbox, this box will already be checked.



User Settings

Default Mailbox

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



Message Signature

Sincerely,
John Adams, M.D.
Head of Oncology
ABC Cancer Center
Sun Valley, OK 12345

💡 *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

Publish?

City & State

Specialties 

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

Keep a copy?

Recipients

- 
- 





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.

Preferences

General Settings

Demonstration Mode ⓘ

Profile Settings

Email Address

Display Settings

After Logging In...

In the Patient List (PL) tab...

When Opening a Patient Chart...

Show Patient History

Show Patient Summary

Other Settings

Patients Per Patient List Page...

Date Range for Filtering Fastlabs Results...

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.

