

This Guide is a short walk through for patient searches. Most new users have said the portal is very user friendly and easy to navigate. All you need is the patient's First Name, Last Name and Date of Birth. The CareAlign® portal allows users to find and access the historical/clinical information through a handful of screens and tabs.

We hope the CareAlign® portal is easy to use but questions and assistance are a part of every integration. If you have any trouble accessing or using the portal please let us know and we will assist you. We're happy to have you and we're always interested in feedback from our users. Welcome to the SacValley MedShare Health Information Exchange Portal.

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Resources:

SacValley MedShare (SVMS) Homepage: <https://sacvalleyms.org/>

Login:

Pwd:

CareAlign® Portal: <https://login.sacvalleymedshare.org/>



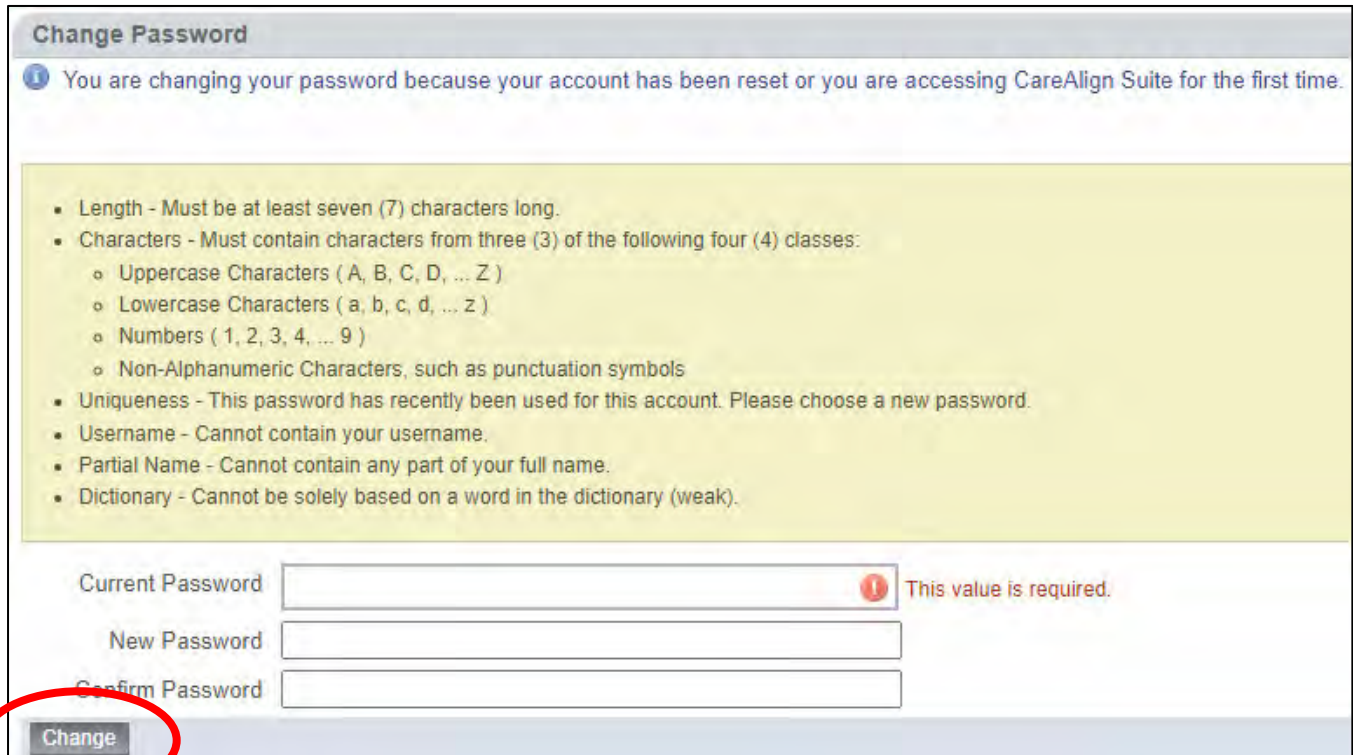
The contact information for SacValley MedShare and The SSI Group (ICA) are listed on the login page.

Contents

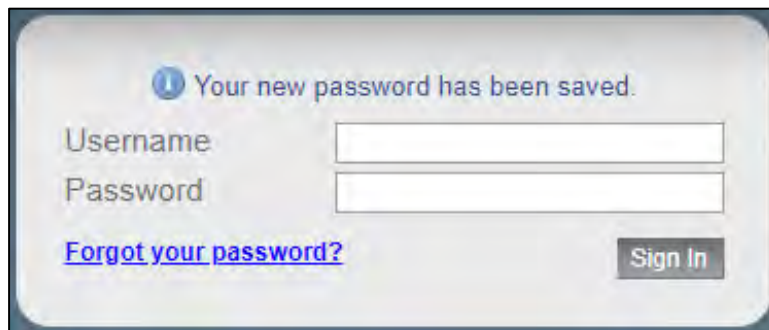
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Logging In:

The first time you login to the system, you will have to set a new password. Input your current password, then type in a new password that meets the requirements listed, and then type it in again to verify it. When completed, click CHANGE.



After clicking CHANGE, you will be taken back to the login page (a message will inform you that your new password has been saved) and login with your username and your new password.



After you login, you will need to setup your security questions. These will be needed if you need to reset your password. Once you fill them in, click SUBMIT.

Security Questions

1 Please select and answer questions from the options provided below.

2 Security questions are required for password recovery and to log in from an unsecure location.

Question 1:

Answer 1:

Question 2:

Answer 2:

Question 3:

Answer 3:

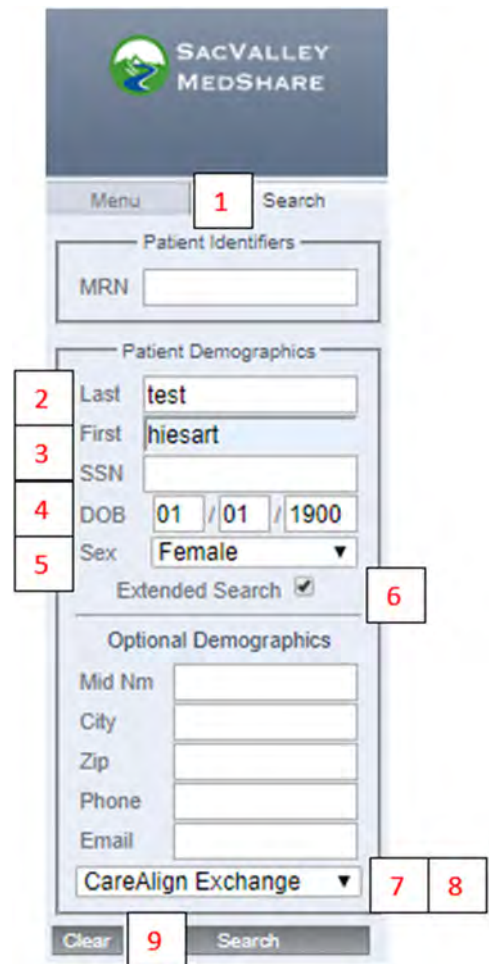
Submit

You will then be taken to the CareAlign® Portal landing page.

Portal Search Functions:

1. Search: Click this to access the HIE
2. Patient Last Name
3. Patient First Name
4. Date of Birth
5. Sex (M/F/U)
6. Extended search: This is checked by default
7. At the bottom of the Optional Demographics section is a drop-down box. It defaults to the CareAlign® Exchange. Put in city and zip to ensure it searches the eHealth eXchange (eHX) connections.
8. This drop-down menu also allows Portal users to search the eHX Network, which is optional. If you specifically only want one of the eHX connections, use this step.
9. Search

SacValley MedShare is always working with our partners to streamline the Portal's functions.

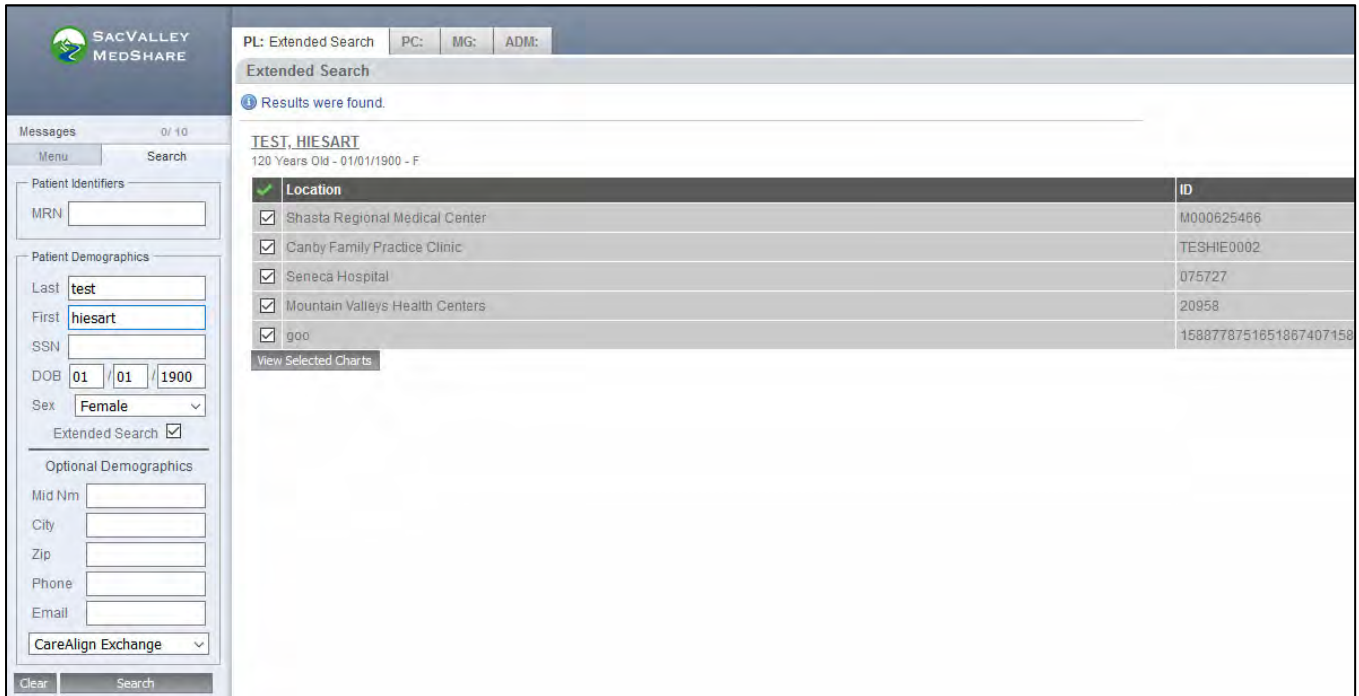


The screenshot shows the search interface of the SacValley MedShare portal. It includes a header with the logo and name, a navigation bar with 'Menu' and 'Search' (callout 1), and several input sections: 'Patient Identifiers' with an MRN field; 'Patient Demographics' with fields for Last Name (callout 2), First Name (callout 3), SSN, DOB (callout 4), and Sex (callout 5); an 'Extended Search' checkbox (callout 6); and 'Optional Demographics' with fields for Mid Nm, City, Zip, Phone, and Email. At the bottom of the optional demographics is a dropdown menu (callout 7) currently set to 'CareAlign Exchange' (callout 8). A 'Clear' button (callout 9) and a 'Search' button are at the very bottom.

Community Search (default):

This is the default search option for the SacValley MedShare HIE. By selecting the SEARCH tab on the static left side of the portal, users can search by entering patient demographics or medical record numbers.

Community Search results will display the various organizations that have matching patient records. Patient First Name, Last Name and Date of Birth are required information. Sex is a required field but “Unknown” is eligible. The only required fields are name, date of birth, and sex. If you want to ensure that all other connections are also searched, like eHealth eXchange, enter two optional demographics, like city and zip code.



The screenshot shows the 'Extended Search' interface. On the left is a search form with the following fields:

- Patient Identifiers:** MRN (empty)
- Patient Demographics:** Last: test, First: hiesart, SSN (empty), DOB: 01/01/1900, Sex: Female, Extended Search:
- Optional Demographics:** Mid Nm (empty), City (empty), Zip (empty), Phone (empty), Email (empty), CareAlign Exchange: dropdown menu

At the top right, there are tabs for 'PL: Extended Search', 'PC:', 'MG:', and 'ADM:'. Below the search form, the results section shows:

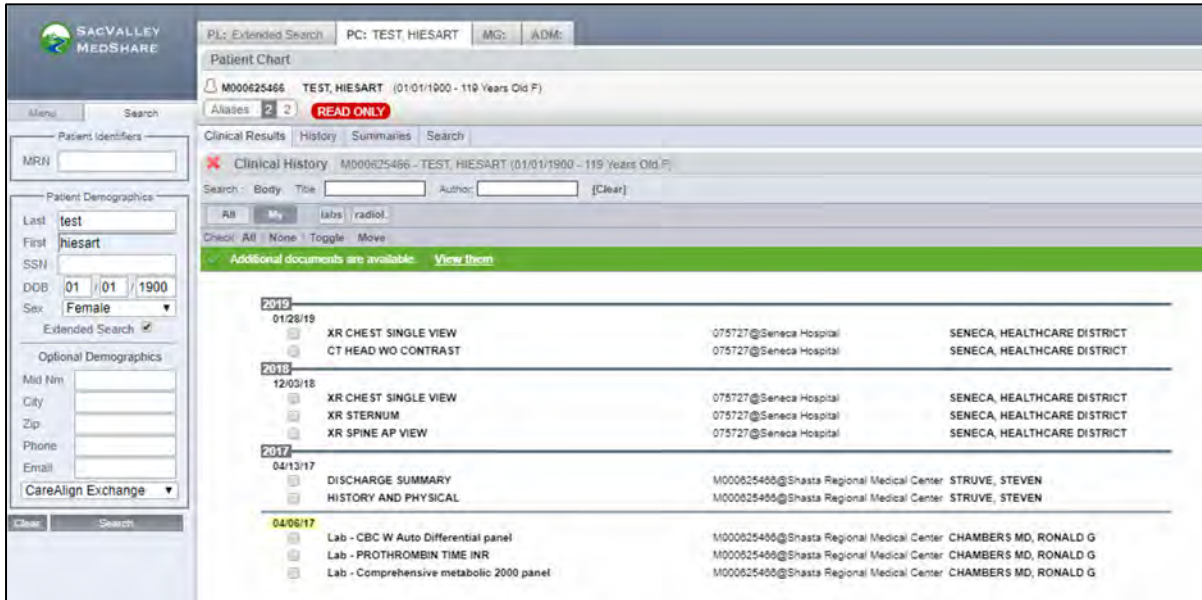
Extended Search
 Results were found.

TEST, HIESART
 120 Years Old - 01/01/1900 - F

Location	ID
<input checked="" type="checkbox"/> Shasta Regional Medical Center	M000625466
<input checked="" type="checkbox"/> Canby Family Practice Clinic	TESHIE0002
<input checked="" type="checkbox"/> Seneca Hospital	075727
<input checked="" type="checkbox"/> Mountain Valleys Health Centers	20958
<input checked="" type="checkbox"/> goo	1588778751651867407158

Below the table is a link: [View Selected Charts](#)

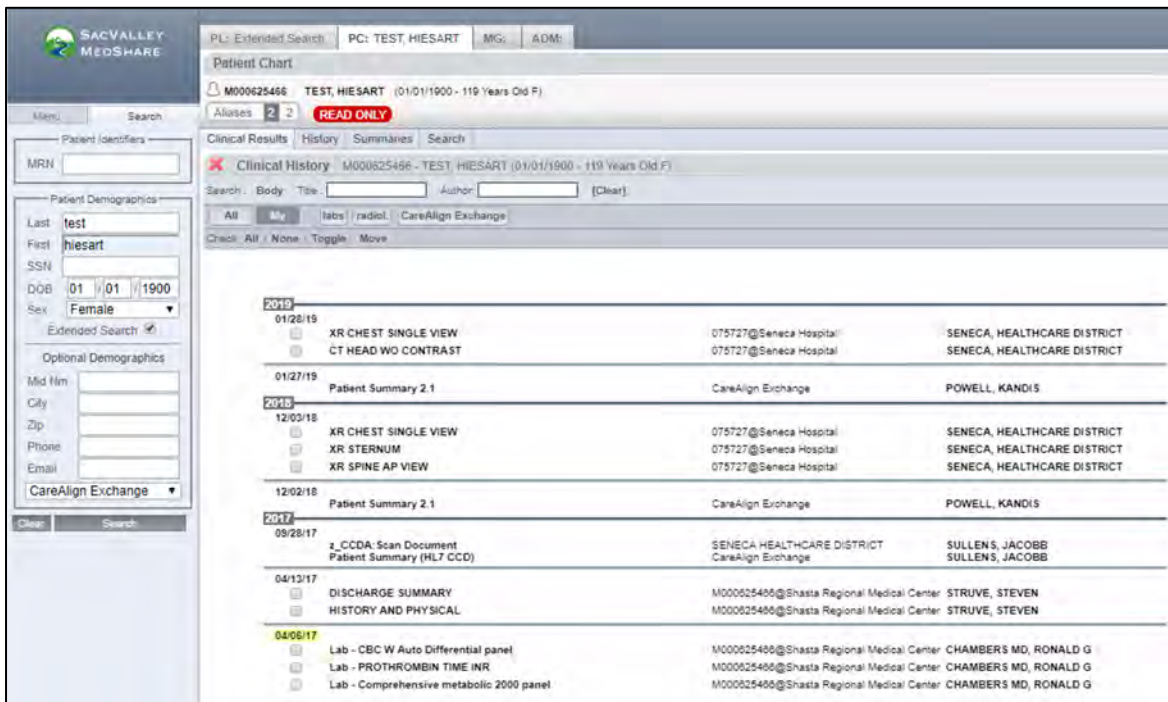
Click on Clinical History to get everything for the patient. To ensure that none of our Portal users misses any information, CareAlign® will automatically alert users who if there are additional documents to view. Both Community Searches and Exchange Searches will display the same alerts. The screenshot below has a green banner alerting the user to additional documents available.



Additional documents are available [View them](#)

Date	Description	Source	Author
2019 01/28/19	XR CHEST SINGLE VIEW	Seneca Hospital	075727@Seneca Hospital
	CT HEAD WO CONTRAST	Seneca Hospital	075727@Seneca Hospital
2018 12/03/18	XR CHEST SINGLE VIEW	Seneca Hospital	075727@Seneca Hospital
	XR STERNUM	Seneca Hospital	075727@Seneca Hospital
	XR SPINE AP VIEW	Seneca Hospital	075727@Seneca Hospital
2017 04/13/17	DISCHARGE SUMMARY	Shasta Regional Medical Center	M000625466@Shasta Regional Medical Center STRUVE, STEVEN
	HISTORY AND PHYSICAL	Shasta Regional Medical Center	M000625466@Shasta Regional Medical Center STRUVE, STEVEN
04/06/17	Lab - CBC W Auto Differential panel	Shasta Regional Medical Center	M000625466@Shasta Regional Medical Center CHAMBERS MD, RONALD G
	Lab - PROTHROMBIN TIME INR	Shasta Regional Medical Center	M000625466@Shasta Regional Medical Center CHAMBERS MD, RONALD G
	Lab - Comprehensive metabolic 2000 panel	Shasta Regional Medical Center	M000625466@Shasta Regional Medical Center CHAMBERS MD, RONALD G

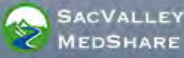
By clicking “View them” you can see additional clinical records appeared. The original records from Seneca Hospital and Shasta Regional Medical Center remain but now there’s additional CareAlign® Exchange records. The source of the data may vary depending on how that data was sent to SacValley.



Date	Description	Source	Author
2019 01/28/19	XR CHEST SINGLE VIEW	Seneca Hospital	075727@Seneca Hospital
	CT HEAD WO CONTRAST	Seneca Hospital	075727@Seneca Hospital
2019 01/27/19	Patient Summary 2.1	CareAlign Exchange	POWELL, KANDIS
2018 12/03/18	XR CHEST SINGLE VIEW	Seneca Hospital	075727@Seneca Hospital
	XR STERNUM	Seneca Hospital	075727@Seneca Hospital
	XR SPINE AP VIEW	Seneca Hospital	075727@Seneca Hospital
2018 12/02/18	Patient Summary 2.1	CareAlign Exchange	POWELL, KANDIS
2017 09/28/17	z_CDDA: Scan Document	Seneca Healthcare District	SULLEN'S, JACOB
	Patient Summary (HL7 CCD)	CareAlign Exchange	SULLEN'S, JACOB
2017 04/13/17	DISCHARGE SUMMARY	Shasta Regional Medical Center	M000625466@Shasta Regional Medical Center STRUVE, STEVEN
	HISTORY AND PHYSICAL	Shasta Regional Medical Center	M000625466@Shasta Regional Medical Center STRUVE, STEVEN
04/06/17	Lab - CBC W Auto Differential panel	Shasta Regional Medical Center	M000625466@Shasta Regional Medical Center CHAMBERS MD, RONALD G
	Lab - PROTHROMBIN TIME INR	Shasta Regional Medical Center	M000625466@Shasta Regional Medical Center CHAMBERS MD, RONALD G
	Lab - Comprehensive metabolic 2000 panel	Shasta Regional Medical Center	M000625466@Shasta Regional Medical Center CHAMBERS MD, RONALD G

eHealth eXchange (eHX) Data Search:

eHX is a group of organizations that are connected to the national eHealth eXchange data network. This information available to SacValley and only requires a separate search if these are the only documents you want to view, the network is maintained by the Sequoia Project <https://sequoiaproject.org/> and regulated under the Federal and California Data Use and Reciprocal Agreements (DURSA's).



Menu Search

Patient Identifiers

MRN

Patient Demographics

Last:

First:

SSN:

DOB: / /

Sex:

Extended Search

Optional Demographics

Mid Nm:

City:

Zip:


Phone:

Email:

eHx Stanford Health C:

- CareAlign Exchange
- eHx Dignity Health
- eHx UC Davis
- eHx Stanford Health Care

Search Results in Clinical History



PL: Extended Search PC: XXTEST, TELESTROKE MG: ADM:

Patient Chart

078906 XXTEST, TELESTROKE (04/10/1980 - 40 Years Old F) PCP: TEST, NELSON

Messages 01 10 READ ONLY

Menu Search

Patient Identifiers

MRN

Patient Demographics

Last:

First:

SSN:

DOB: / /

Sex:

Extended Search

Optional Demographics

Mid Nm:

City:

Zip:

Phone:

Email:

CareAlign Exchange

Clear Search

PL: Extended Search PC: XXTEST, TELESTROKE MG: ADM:

Patient Chart

078906 XXTEST, TELESTROKE (04/10/1980 - 40 Years Old F) PCP: TEST, NELSON

Messages 01 10 READ ONLY

Menu Search

Clinical Results History Summaries Search

Clinical History Labs Fast Labs Deleted

X Clinical History 078906 - XXTEST, TELESTROKE (04/10/1980 - 40 Years Old F)

Search: Body Title: Author: [Clear]

All My CareAlign Exchange

Check All / None / Toggle Move

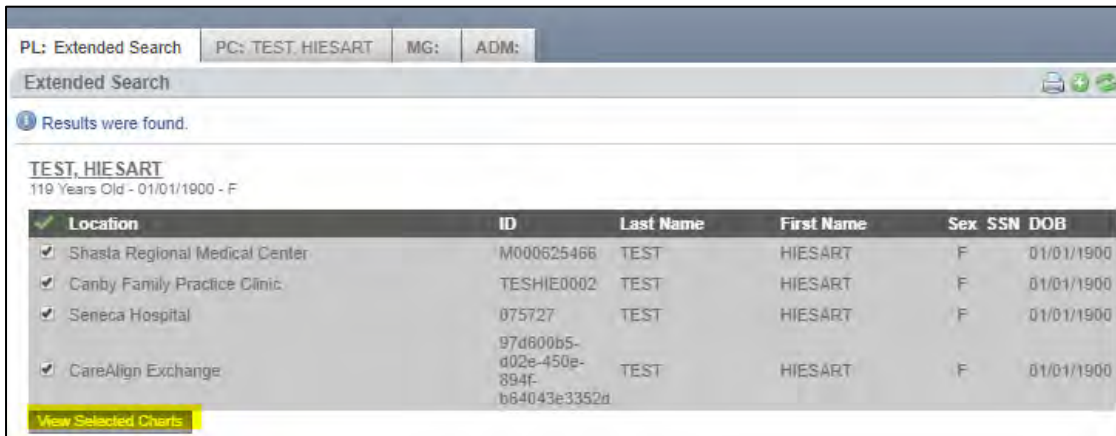
0 additional documents were found.

2020

06/05/20

Continuity of Care Document	UC Davis Health
Telephone Summary	UC Davis Health
Office Visit Summary	UC Davis Health
Chart Update Summary	UC Davis Health
Orders Only Summary	UC Davis Health
Office Visit Summary	UC Davis Health
Office Visit Summary	UC Davis Health
Chart Update Summary	UC Davis Health

Navigating the CareAlign® Portal:

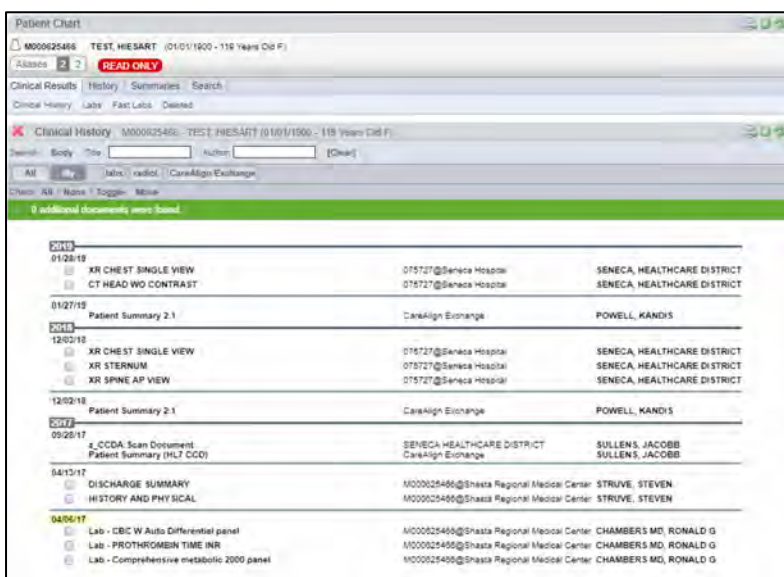


Location	ID	Last Name	First Name	Sex	SSN	DOB
<input checked="" type="checkbox"/> Shasta Regional Medical Center	M000625466	TEST	HIESART	F		01/01/1900
<input checked="" type="checkbox"/> Canby Family Practice Clinic	TESHIE0002	TEST	HIESART	F		01/01/1900
<input checked="" type="checkbox"/> Seneca Hospital	075727	TEST	HIESART	F		01/01/1900
<input checked="" type="checkbox"/> CareAlign Exchange	97d600b5-d02e-450e-894f-b64043e3352d	TEST	HIESART	F		01/01/1900

After performing a patient search, and selecting the desired facility records, click on **VIEW SELECTED CHARTS** button. Click on one of the Clinical History, History, Summaries, tabs and click a category to view patient documents.

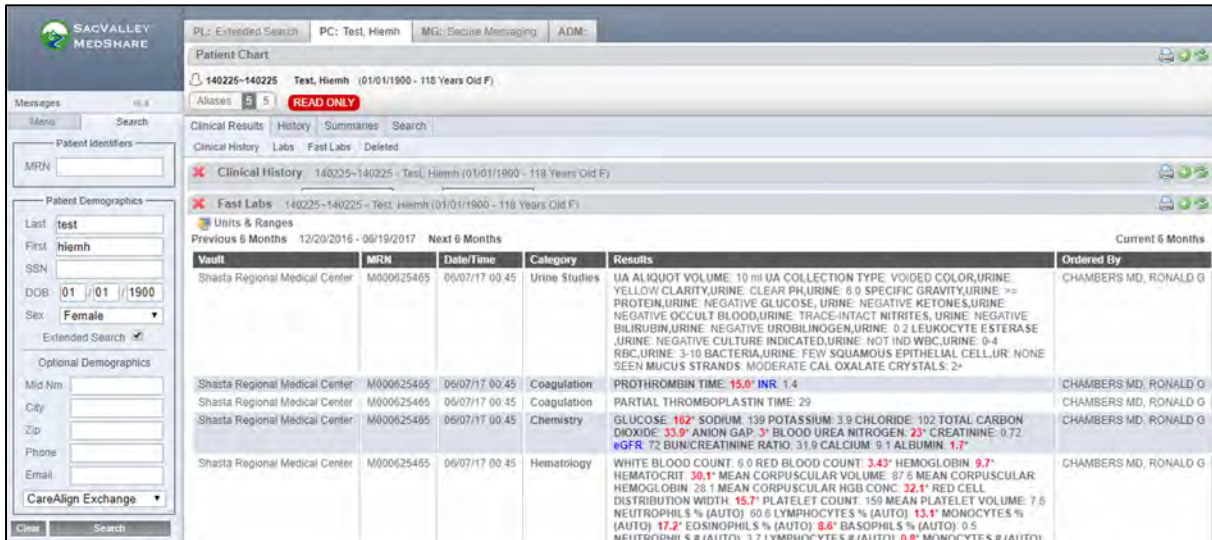


Clinical History provides a summary of patient records and is a useful place to begin a search. It contains CCDs provided by HIE members, it created an on-demand CCD (Patient Summary HL7 CCD) compiled from discrete data from various HL7 ADT records, along with laboratory data.



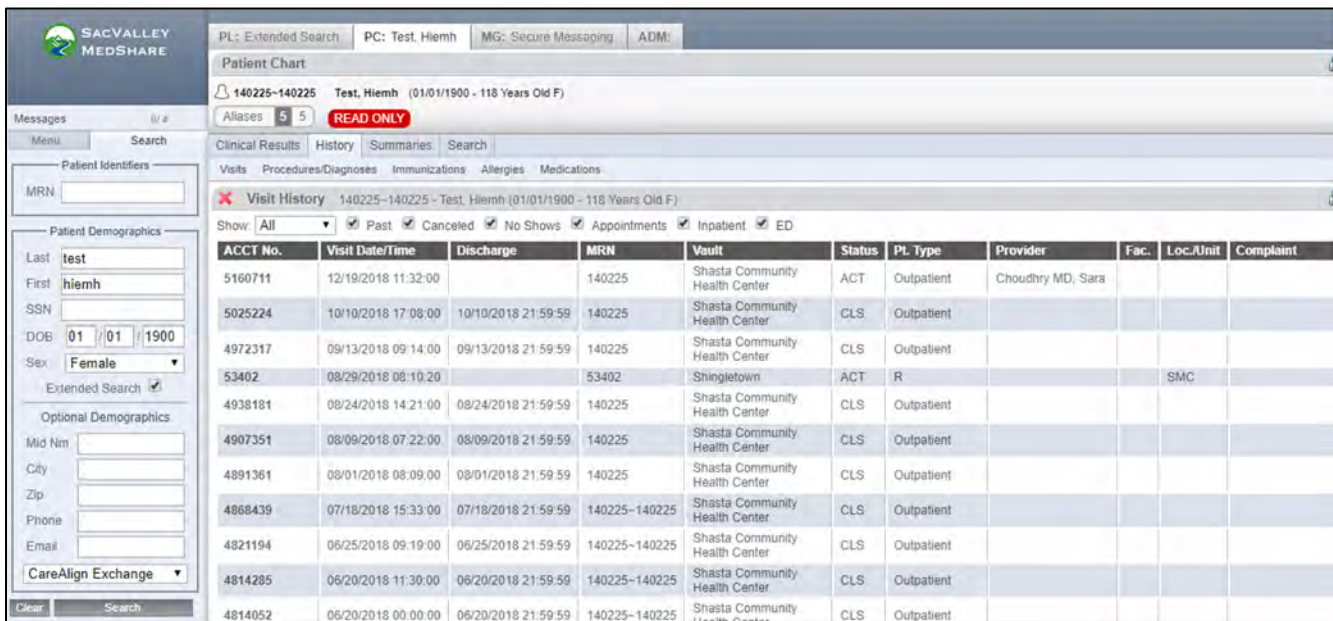
Date	Description	Author	Facility
01/28/19	XR CHEST SINGLE VIEW	075727@Seneca Hospital	SENECA, HEALTHCARE DISTRICT
	CT HEAD W/ CONTRAST	075727@Seneca Hospital	SENECA, HEALTHCARE DISTRICT
01/27/19	Patient Summary 2.1	CareAlign Exchange	POWELL, KANDIS
12/02/18	XR CHEST SINGLE VIEW	075727@Seneca Hospital	SENECA, HEALTHCARE DISTRICT
	XR STERNUM	075727@Seneca Hospital	SENECA, HEALTHCARE DISTRICT
	XR SPINE AP VIEW	075727@Seneca Hospital	SENECA, HEALTHCARE DISTRICT
12/02/18	Patient Summary 2.1	CareAlign Exchange	POWELL, KANDIS
09/26/17	_CCDA_Scan Document Patient Summary (HL7 CCD)	Seneca Healthcare District CareAlign Exchange	SULLENS, JACOB SULLENS, JACOB
04/13/17	DISCHARGE SUMMARY	M00025466@Shasta Regional Medical Center	STRUVE, STEVEN
	HISTORY AND PHYSICAL	M00025466@Shasta Regional Medical Center	STRUVE, STEVEN
04/06/17	Lab - CBC W Auto Differential panel	M00025466@Shasta Regional Medical Center	CHAMBERS MD, RONALD G
	Lab - PROTHROMBIN TIME INR	M00025466@Shasta Regional Medical Center	CHAMBERS MD, RONALD G
	Lab - Comprehensive metabolic 2000 panel	M00025466@Shasta Regional Medical Center	CHAMBERS MD, RONALD G

FAST LABS option will allow you to view lab results in 6-month intervals.



Vault	MRN	Date/Time	Category	Results	Ordered By
Shasta Regional Medical Center	M000625465	06/07/17 00:45	Urine Studies	UA ALIQUOT VOLUME: 10 ml UA COLLECTION TYPE: VOIDED COLOR, URINE: YELLOW CLARITY, URINE: CLEAR PH, URINE: 8.0 SPECIFIC GRAVITY, URINE: => PROTEIN, URINE: NEGATIVE GLUCOSE, URINE: NEGATIVE KETONES, URINE: NEGATIVE OCCULT BLOOD, URINE: TRACE-INTACT NITRITES, URINE: NEGATIVE BILIRUBIN, URINE: NEGATIVE UROBILINOGEN, URINE: 0.2 LEUKOCYTE ESTERASE, URINE: NEGATIVE CULTURE INDICATED, URINE: HOT IND WBC, URINE: 0-4 RBC, URINE: 3-10 BACTERIA, URINE: FEW SQUAMOUS EPITHELIAL CELL, UR: NONE SEEN MUCUS STRANDS. MODERATE CAL OXALATE CRYSTALS. 2+	CHAMBERS MD, RONALD G
Shasta Regional Medical Center	M000625465	06/07/17 00:45	Coagulation	PROTHROMBIN TIME: 15.0 INR: 1.4	CHAMBERS MD, RONALD G
Shasta Regional Medical Center	M000625465	06/07/17 00:45	Coagulation	PARTIAL THROMBOPLASTIN TIME: 29	CHAMBERS MD, RONALD G
Shasta Regional Medical Center	M000625465	06/07/17 00:45	Chemistry	GLUCOSE: 162 SODIUM: 139 POTASSIUM: 3.9 CHLORIDE: 102 TOTAL CARBON DIOXIDE: 33.9 ANION GAP: 3 BLOOD UREA NITROGEN: 23 CREATININE: 0.72 eGFR: 72 BUN/CREATININE RATIO: 31.9 CALCIUM: 9.1 ALBUMIN: 1.7	CHAMBERS MD, RONALD G
Shasta Regional Medical Center	M000625465	06/07/17 00:45	Hematology	WHITE BLOOD COUNT: 6.0 RED BLOOD COUNT: 3.43 HEMOGLOBIN: 9.7 HEMATOCRIT: 30.1 MEAN CORPUSCULAR VOLUME: 87.6 MEAN CORPUSCULAR HEMOGLOBIN: 28.1 MEAN CORPUSCULAR HGB CONC: 32.1 RED CELL DISTRIBUTION WIDTH: 15.7 PLATELET COUNT: 150 MEAN PLATELET VOLUME: 7.6 NEUTROPHILS % (AUTO): 60.6 LYMPHOCYTES % (AUTO): 13.1 MONOCYTES % (AUTO): 17.2 EOSINOPHILS % (AUTO): 8.6 BASOPHILS % (AUTO): 0.5 NEUTROPHILS # (AUTO): 3.7 LYMPHOCYTES # (AUTO): 0.8 MONOCYTES # (AUTO):	CHAMBERS MD, RONALD G

The History tab is a more detailed list of patient encounters and is most useful when searching for specific patient encounter(s). This tab contains in depth information not found in the Clinical History summary section. Textual information such as radiology reports, physician notes, patient history, etc. This section provides a more longitudinal view of a patient's medical record.



ACCT No.	Visit Date/Time	Discharge	MRN	Vault	Status	Pl. Type	Provider	Fac.	Loc./Unit	Complaint
5160711	12/19/2018 11:32:00		140225	Shasta Community Health Center	ACT	Outpatient	Choudhry MD, Sara			
5025224	10/10/2018 17:08:00	10/10/2018 21:59:59	140225	Shasta Community Health Center	CLS	Outpatient				
4972317	09/13/2018 09:14:00	09/13/2018 21:59:59	140225	Shasta Community Health Center	CLS	Outpatient				
53402	08/29/2018 08:10:20		53402	Shingletown	ACT	R		SMC		
4938181	08/24/2018 14:21:00	08/24/2018 21:59:59	140225	Shasta Community Health Center	CLS	Outpatient				
4907351	08/09/2018 07:22:00	08/09/2018 21:59:59	140225	Shasta Community Health Center	CLS	Outpatient				
4891361	08/01/2018 08:09:00	08/01/2018 21:59:59	140225	Shasta Community Health Center	CLS	Outpatient				
4868439	07/18/2018 15:33:00	07/18/2018 21:59:59	140225-140225	Shasta Community Health Center	CLS	Outpatient				
4821194	06/25/2018 09:19:00	06/25/2018 21:59:59	140225-140225	Shasta Community Health Center	CLS	Outpatient				
4814285	06/20/2018 11:30:00	06/20/2018 21:59:59	140225-140225	Shasta Community Health Center	CLS	Outpatient				
4814052	06/20/2018 00:00:00	06/20/2018 21:59:59	140225-140225	Shasta Community Health Center	CLS	Outpatient				

Printing:

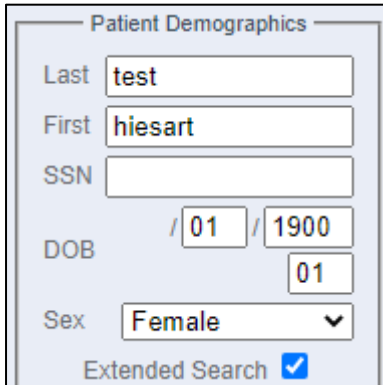
Document: Click on the Printer icon to the right of the screen of any tab.

Labs: To print labs, click on the lab from the **Clinical History** screen. See step 9.

Note: The Lab tab, highlighted above, will open a spreadsheet view of the labs but that view does **NOT** print as a spread sheet document. Each lab comes out on a separate "block" of information.

Security Override/Breaking the Glass:

1. Search for the patient.



Patient Demographics

Last

First

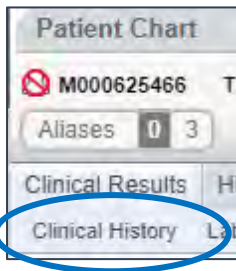
SSN

DOB / /

Sex

Extended Search

2. Click **View Selected Charts**
3. Click on the lock on the **Secured Data** button
 - a. If you do not see the Secured Data Button, click on Clinical History to force it.



Patient Chart

M000625466 T

Aliases

Clinical Results H

Clinical History L

4. You will be presented with the Security Override screen.



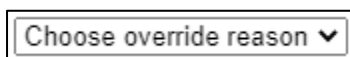
PL: Extended Search PC: Security Override MG: ADM:

Security Override

⚠ You are trying to access secured data. This action will be reported and can be audited.

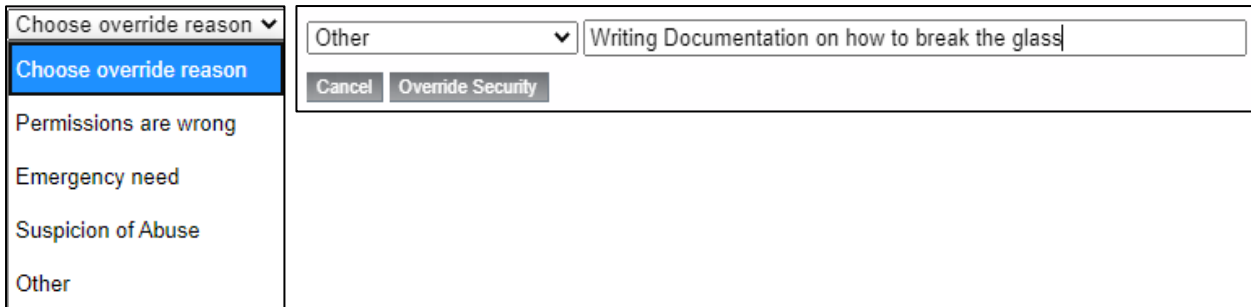
Choose override reason ▼

5. Click on the drop-down for



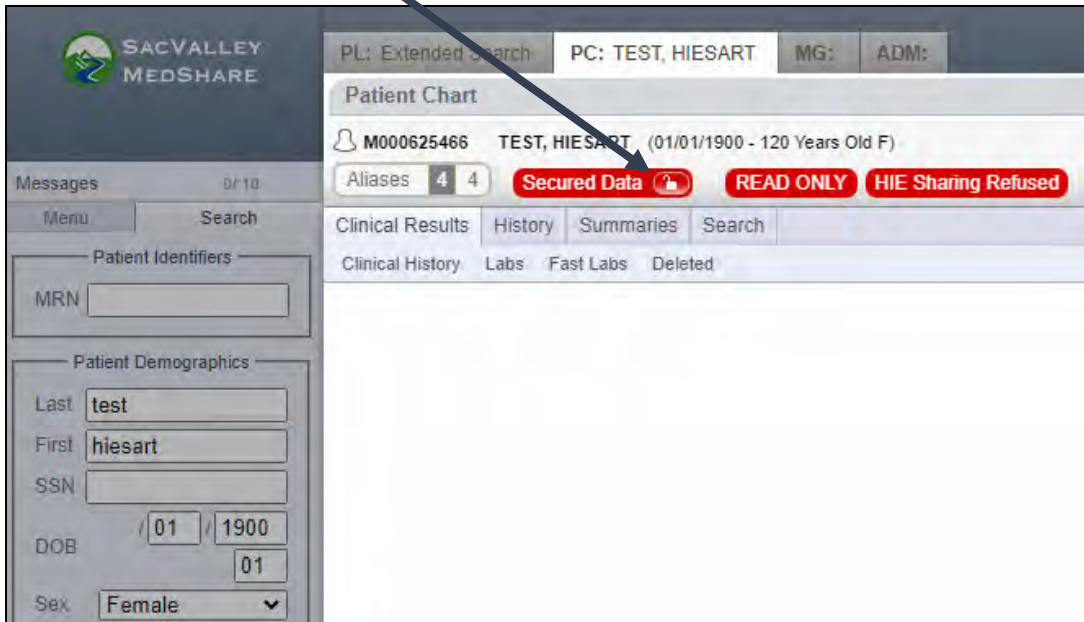
Choose override reason ▼

6. Choose one of the reasons or you can choose OTHER and type in your own reason.



7. Click on **Override Security**

8. This will take you back to the Patient Chart. You will notice that everything except the chart is greyed out and the Secured Data notice is unlocked.



9. You can now move around the chart and get the information you are needing.

10. When you are finished with the chart, you will need to click on the unlocked button to relock the chart.



Quick Patient Search:

If a user is looking for a specific patient record from a known healthcare provider that is connected to SVMS, the standard expanded search process is not necessary. Simply type in the known information such as last name or MRN and click “search.”

No Patient Data:

If the patient doesn't return any documents in the HIE, please check the date you're requesting and compare it to the list below. If the request falls after the date there should be data. Another reason for no patient data is because the patient can "opt-out" of having their data submitted to the HIE or they may be a confidential patient.

If there are not records in the HIE, and you've verified the name, DOB & sex are correct, you'll have to do the paper method.

CURES Reports:

1. Search for the patient as you normally would.

Patient Demographics

Last

First


SSN

DOB / /

Sex ▼

Extended Search

2. Click **View Selected Charts**
3. At the top of the Patient Chart, there will be a CURES button.


QM00014823 Doe, John (01/06/1990 - 31 Years Old F)

READ ONLY
CURES

Clinical Results | History | Summaries | Search

Clinical History | Labs | Fast Labs | Deleted

4. Click on the **CURES** button.
5. If the patient has a report, it will display, if not, there will be no results returned. You can print the report to PDF, but this will count in the State database as checking CURES.

CURES Information QM00014823 - Doe, John (01/06/1990 - 31 Years Old F)

CareAlign Patient Information

Current Patient Address ### Ironwood Streett, Vacaville, CA 93301

Phone (H) + 707 555 1212 x

Phone (W) + 707 944 4400 x

SSN XXX-XX-7852

Race Nat American/Eskimo/Aleutian

Religion Christian

Marital Status Single

CURES Patient Information

Name JOHN DOE

Patient Identification Number 111282

Date of Birth 06/01/1990 (31 Years Old)

Gender F

Address ### IRONWOOD STREETT
VACAVILLE, CA 93301

Medications Dispensed

Fill Date	Prescriber	Pharmacy	Drug	Days Supply	Quantity	Strength
09/12/2020	PRESCRIBER 38 PRESCRIBER 38 DEA Number: undefined NPI: -	PHARMACY 11 State License Number: PHY00010	DRUG 1	5	30.0 AC	650 MG-100 MG - TAB

Rx#: 16348388; PaymentMethod: Com.Insurance; SpeciesCode: 01; Refill#: 0; RefillsAuthorized: 0