Welcome to the SHARE Clinical Portal Fast Track module
Based on your *SHARE User Access profile*, you may not have access to all tabs nor certain features and data covered in this module.

If you have any questions about your access profile, please consult with your Manager.

**Note:** Patient and provider names and data used in this module are fictitious and do not represent real patient records.
Also you should be aware that throughout these training materials you will often be referred to other training modules for more information. You do not have to go to these modules immediately. However, if you do want to learn more about a particular SHARE module you can view it at any time that is convenient for you.
Objectives

On completion of the Fast Track Module, the learner will be able to:

1. Log in to the SHARE Clinical Portal
2. Locate a patient using:
   - My Patient Census
   - Patient Search
   - Personal Worklist
3. Locate test results
4. Locate clinical reports
5. Log out or Suspend from the SHARE Clinical Portal
Let's Log In by entering your user name (case sensitive) and press <Tab> on your computer keyboard.

Enter your password (case sensitive) and click the Log In button or press <Enter> on your keyboard.
Now that you have logged in, notice that the SHARE system is made up of a series of tabs that include:

- Patient Search
- My Patient Census
- Results
- Clinical Reports
- Facesheet
- Personal Worklist
- My Page
Where can I locate a patient?

Introduction

There are three ways to locate a patient on the SHARE Clinical Portal.

Access to some of these tabs on the SHARE Clinical Portal will be determined by your role.

- Click on each tab to view each screen.
- Click on the screen to enlarge or close the window.
Click on the “magnifying glass” to enlarge the image.
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Click on the “magnifying glass” to enlarge the image.
Where can I locate a patient?

Summary

Let's explore how to locate a patient in each of these tabs and view their results and clinical reports.
Let’s start with My Patient Census.
For easier work flow and to narrow your census list, you can use the following filters:

- **Facility**
- **Patient Type**
- **Status**
- **Census Type**

You can learn more details in the My Patient Census Module.
Once you have found your patient on the census list, click on the patient name to get their results.
You will then be taken to the Results tab.
Another way to locate a patient is to click the **Patient Search** tab at the top of your screen.
On opening the Patient Search tab, you will be presented with a screen appropriate to your role.

This is an example of a **Search by Number** (2) screen that uses a patient's Medical Record Number (MRN) or their Encounter Number to find the patient.

You will learn more about this in the Patient Search module, but for now understand that the search screen you use will depend on your role. It is possible that you may not have access to this tab at all.
For this demonstration, we will perform a **Master Patient Index (MPI)** search which searches both active and discharged patients.

You can choose which patient ID number to use by clicking on either the **Medical Record Number (MRN)** button or the **Encounter Number** button.

- We will search by entering the patient's **MRN** in the Search identifier field and then clicking on the **Search** button.
If you are not associated to the patient, a message will appear warning that you are not the clinician of record, and if you proceed you will be subject to an additional level of audit. Choose OK if you still wish to view this record.
You will now see a **Visits** box and the patient’s name highlighted in blue. If you click on the patient’s name...
You will be taken to the **Results** tab and will see the patient’s results.
To find results for a specific encounter, click the **Visits** button.
You will see a list of the patient’s encounters in chronological order. Just click on the encounter (highlighted in blue) you want to view and you will see the results of that encounter.
The third way to locate your patient is through Personal Worklist. Personal Worklist allows you to create your own patient lists that you can use and that you can share with others. As with My Patient Census and Patient Search, you may or may not have access to this tab.

If you have set it as the default using the Edit function of this screen, clicking on the patient's name (highlighted in blue) will take you to the Results tab to see the patient's results.

See the Personal Worklist module for more information on how to use the Edit function and to add patients to your worklist.
Now that we have seen the three ways to locate a patient and get their results, let's explore the Results tab further.
Refer to the Results and Clinical Reports module for more detailed information
Or you can look at another patient’s results by clicking on that patient’s name in the patient dropdown list.

To learn more about what patients will be displayed in the patient dropdown list, refer to the My Patient Census module.
The Results screen provides you with several filters you can use to find specific results quickly and easily.
Click on the box next to **New results, Today’s results**,
Or **Results by test class**, which groups together lab and radiology results as shown here.
You can also filter results for a certain period of time starting on a specific date going back a number of days. Today's date is the default **Start On** date.
In addition, you can search for specific test results by entering the test name or a portion of the name in the **Procedure Description Search** box.

Then click **Refresh** or press **Enter** on your keyboard.

In this demonstration, Protime (PT) was entered and all of the PT results are shown. Note that the PTT results also displayed as PTT had similar letters to the PT.
To see a result, click on the result name in the **Item (Order Number)** column.

To view multiple results, click on the check boxes to the left of the **RsltLvl** column.
Note that abnormal lab values are highlighted in red.
Result Flags - Introduction

Result flags are used to alert you to new and abnormal lab results.

- Click on the red markers to view the information about each marker.
- Click on the X to close each window.
**New or Normal**

New and normal lab result that you have not viewed. Once viewed the new icon is removed. Note: The new flag by a radiology result only signifies a new result not a normal result.

<table>
<thead>
<tr>
<th>Test Date</th>
<th>Time</th>
<th>Test Name</th>
<th>Status</th>
<th>History</th>
<th>Accession</th>
</tr>
</thead>
<tbody>
<tr>
<td>02/22/09</td>
<td>13:11</td>
<td>CHEST NON-DEDICATEDUNIT-ON</td>
<td>Final</td>
<td>Final</td>
<td>Final</td>
</tr>
<tr>
<td>02/20/09</td>
<td>15:30</td>
<td>CBC</td>
<td>Final</td>
<td>Final</td>
<td>Final</td>
</tr>
<tr>
<td>02/20/09</td>
<td>10:16</td>
<td>2-Discharge Summary (STAFFD, 244)</td>
<td>Final</td>
<td>Final</td>
<td>Final</td>
</tr>
<tr>
<td>02/20/09</td>
<td>10:38</td>
<td>CT HEAD NON-ENHANCED-RE (STAFFD, EHR)</td>
<td>Final</td>
<td>Final</td>
<td>Final</td>
</tr>
<tr>
<td>02/20/09</td>
<td>10:15</td>
<td>Specimen Integrity</td>
<td>Final</td>
<td>Final</td>
<td>Final</td>
</tr>
<tr>
<td>02/20/09</td>
<td>10:15</td>
<td>Creatinine</td>
<td>Final</td>
<td>Final</td>
<td>Final</td>
</tr>
<tr>
<td>02/20/09</td>
<td>10:15</td>
<td>Urea</td>
<td>Final</td>
<td>Final</td>
<td>Final</td>
</tr>
<tr>
<td>02/20/09</td>
<td>10:15</td>
<td>TOCPN-1</td>
<td>Final</td>
<td>Final</td>
<td>Final</td>
</tr>
<tr>
<td>02/20/09</td>
<td>10:15</td>
<td>PT</td>
<td>Final</td>
<td>Final</td>
<td>Final</td>
</tr>
</tbody>
</table>
Results Flags

A clear flag with S/A or Panic is a result that you have viewed.

<table>
<thead>
<tr>
<th>Item (Order Number)</th>
<th>Status</th>
<th>History</th>
<th>Accession</th>
</tr>
</thead>
<tbody>
<tr>
<td>CT HEAD, COMBINED NE (STAFFED, END)</td>
<td>Final</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Staphylococcus aureus</td>
<td>Final</td>
<td></td>
<td></td>
</tr>
<tr>
<td>None</td>
<td>Final</td>
<td></td>
<td></td>
</tr>
<tr>
<td>None</td>
<td>Final</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Specimen Integrity</td>
<td>Final</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Creatinine</td>
<td>Final</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PT</td>
<td>Final</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Thrombin T</td>
<td>Final</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PT</td>
<td>Final</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Introduction
After you have viewed a new and/or normal result, the green flag will disappear.

- Click on the markers to view information about each flag.
- Click on the X at the top right of each tab to close the tab.
Viewed Results Flags

Viewed Normal Flag

Once you have read a result a "V" will appear indicating you have just read the result. The "V" will remain only during your current login.
Viewed S/A or Panic Flag

When you have read a significant/Abnormal (S/A) or a Panic result, the flag will become clear, but the S/A or Panic lettering will remain.
Viewed Results Flags

Summary

The disappearance or colour change of result flags is associated with your user ID and will not impact other users' flags for the same patient.

Patient: ARCHIVE, TRACEY; CR20040021
Encounter: 7/26/09; JONES, BRANDY D (a)

<table>
<thead>
<tr>
<th>Date</th>
<th>Test Description</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/20/09</td>
<td>CHEST A VIEWS-Cr</td>
<td>Pending</td>
</tr>
<tr>
<td>08/18/09</td>
<td>BK PRODUCT ISSUE</td>
<td>Received</td>
</tr>
<tr>
<td>08/17/09</td>
<td>BK PRODUCT ISSUE</td>
<td>Received</td>
</tr>
<tr>
<td>08/13/09</td>
<td>BK PRODUCT ISSUE</td>
<td>Received</td>
</tr>
<tr>
<td>07/27/09</td>
<td>ASPARTATE AMINO TRANSFERASE</td>
<td>Received</td>
</tr>
<tr>
<td>07/12/09</td>
<td>ASPARTATE AMINO TRANSFERASE</td>
<td>Completed</td>
</tr>
<tr>
<td>07/12/09</td>
<td>LIVER LEFT-VEL (STIFFEN, HARVEST)</td>
<td>Pending</td>
</tr>
<tr>
<td>07/12/09</td>
<td>LIVER BILATER-LS</td>
<td>Pending</td>
</tr>
<tr>
<td>07/12/09</td>
<td>ALANINE AMINO TRANSFERASE</td>
<td>Completed</td>
</tr>
<tr>
<td>07/12/09</td>
<td>ALANINE AMINO TRANSFERASE</td>
<td>Completed</td>
</tr>
<tr>
<td>07/12/09</td>
<td>24 HR UREA CREATION</td>
<td>Received</td>
</tr>
</tbody>
</table>

Show Selected Results  Show All Results
Click on **Appendix** in the upper right hand corner of the **Results** tab to open the **Lab Appendix** information discussed in the previous slides.
When you see an icon in the **Images** column, this means there is a diagnostic image available for viewing.

Click on the icon and the image will open for you to view.

Note: For Radiology results, the green flag in the **RsltsLvl** column does not signify that the result is normal only that it is a new result.
This is an example of a Web 1000 view of a CT of the head.
Now let’s locate Clinical Reports for a patient.
The Clinical Reports screen looks similar to the Results screen. It is where you will view clinical reports such as operative reports, consult notes, and discharge summaries that are available in the SHARE Clinical Portal.
This is an example of a discharge summary viewed by clicking the report name in the Item (Order Number) column.
In the Clinical Reports screen, you can change the patient or encounter using either the patient drop down list...
or the encounter drop down list at the top of the screen.
To find information quickly and easily, you can filter and search for reports the same way as you would for test results. You can filter reports by New results, Today’s results, Results by test class, and by Date ranges.

You can also find specific types of reports using the Procedure Description Search box.
Type any part of the report name in the box, and click Refresh or press Enter on your computer keyboard.

For example, type “dis” and click Refresh or press Enter.
And all of the Discharge Summaries displayed.
In this example the discharge summaries for the past 100 days are displayed because the **Start On/Go Back to** feature was activated by the use.
Now that you know how to find test results and clinical reports, let’s look at the **Suspend** and **Log Out** features of the SHARE Clinical Portal.

Suspend means you are still logged in, but you are locking your view or session of SHARE from other users.

You can manually suspend the screen by clicking the **Suspend** button at the top of your screen or the screen will lock automatically after 15 minutes of inactivity.
When the **Current Session is Suspended** screen appears, you will need to enter your password within 15 minutes to return to your session. If you don’t, you will automatically be logged out of the SHARE Clinical Portal and a new Log In screen will appear.

You can also Sign Out of the Portal from this screen by clicking the **Sign Out** button.

If you are not this user, then click the Sign Out button to end the current session and start your own.
To protect patient privacy and the confidentiality of their information; once you have found the information you need it is recommended that you Log Out by clicking on the Log Out button at the top of the screen. This, rather than Suspend, is the preferred method of exiting the SHARE Clinical Portal.
Now test your skills by taking the Fast Track Quiz.

Throughout this quiz, once you have answered the question, click the **Submit** button to proceed to the next question.
Answer: False.
Answer: Click on the icon in the Images column., circled in red above.
See next slide for correct answers
Green – A new result that has not been viewed
Yellow – A significant or abnormal result that has not been viewed
Red – A critical result that has not been viewed
Clear – A result that has been viewed
When exiting the SHARE Clinical Portal or leaving your computer for a period of time, it is recommended to:

- Log out by clicking on the log out tab
- Just leave the computer as it will log out on its own
- Put the session in Suspend by clicking on the Suspend tab
- Leave it on so someone else can use the SHARE Clinical Portal

**Answer:** Log out by clicking on the log out tab
Answer: Click on Patient Search (circled in red) to search for the next patient, or on the Patient drop down box (circled in blue) under the Patient Search tab to choose a new patient from your Patient Census list. How you search or switch patients will be dependent upon your role and level of access.
Thank You, for taking the Fast Track module of the SHARE Clinical Portal training course.

For more in depth information about the portal features, please continue with the other modules included in the SHARE Clinical Portal training course.
SHARE Clinical Portal Fast Track Module
Version 1: November 2009

This learning module was developed and reviewed by:
The SHARE Program and HITS-NS

To exit this module please click the X in the top right corner of the screen.