THE INDIAN HEALTH SERVICE

Personal Health Record and Patient Access

Superior Health Information Management
Now and for the Future

Presenter

Duane Rozsnyai, MBA, PMP, ITIL v3.1

PHR Project Manager/Analyst

Agenda

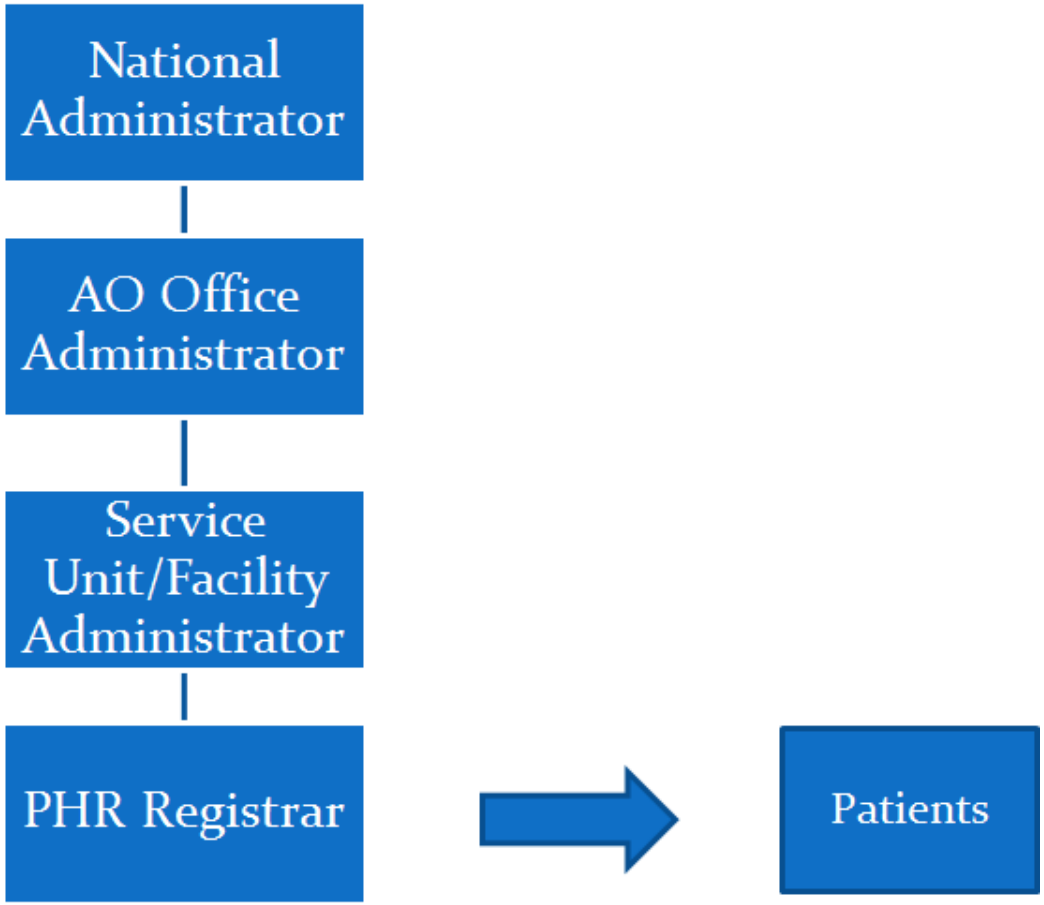
- Personal Health Record (PHR) Overview:
  - Administrator Web Portal.
  - Patient Web Portal.
- PHR Roles and Responsibilities:
  - Area Administrator.
  - Service Unit/Facility Administrator.
  - PHR Registrar.
- PHR Administrator Web Portal:
  - Role-Based Functions.
  - Audits.
  - Process Patient's PHR Application.
  - Common Administrator Functions.
- PHR Patient Web Portal Overview:
  - Register to Use.
  - Grant Access to Patients' Personal Representatives.
- Patient Access (VDT) Meaningful Use Stage 2 Measures:
  - Eligible Provider.
  - Eligible Hospital.
  - EHR Patient Access Update.

PHR Overview

- PHR Dependencies:
  - 2014 Certified EHR:
    - Consolidated-Clinical Document Architecture (CCDA).
  - Master Patient Index (MPI).
  - Health Information Exchange (HIE).
  - RPMS DIRECT Messaging:
    - Providers, messaging agents, and other healthcare professionals.
    - Patients.
- Two PHR Web Portal Applications:
  - Administrative Web Portal.
  - Patient Web Portal.

PHR Roles and Responsibilities

PHR Administrative Hierarchy



Area Administrator Roles

- Read other area administrator accounts.
- Create, read, update, or deactivate area:
  - Service Unit/Facility (SU/F) Administrators (SU/FA).
  - SU/F PHR Registrar.
- Update or unlink PHR patient access.
- Generate audit reports.
- Reset own password.
- Maximum of 10 AO administrators per area.

Area Administrator Responsibilities

- Prepare SU/F for deployment.
- Verify SU/F's readiness for deployment.
- Verify the identity of the SU/FA.
- Create SU/FA account.
- Update or change SU/FA passwords upon request.
- Update, inactivate, or reactivate SU/FA account.
- Regular audits (Area Office).
- Provide SU/FA PHR training:
  - PHR Administrator Web Portal.

Additional Area Administrator Responsibilities

- Verify the identity of the PHR Registrar.
- Create the PHR Registrar account.
- Update or change PHR Registrar passwords upon request.
- Update, inactivate, or reactivate the PHR Registrar account.
- Update or change PHR user passwords upon request.
- Unlink PHR patient access.
- Respond to other PHR user help requests.
- Audit reports for SU/F.

SU/FA Roles

- Read other SU/FA accounts within own facility.
- Create, read, update, or deactivate SU/F:
  - PHR Registrar.
- Update or unlink PHR patient access.
- Generate audit reports.
- Reset own password.
- Maximum of six SU/FA per facility.

SU/FA Responsibilities

- Work with the Area Administrator to verify readiness.
- Prepare PHR handouts and materials.
- Verify the identity of the SU/F PHR registrars.
- Create SU/F PHR registrar accounts.
- Update or change SU/F PHR Registrar passwords upon request.
- Update, inactivate, or reactivate the SU/F PHR Registrar's account.
- Conduct regular audits (SU/F).
- Provide the SU/F PHR Registrar with PHR training:
  - PHR Administrator Web Portal.
  - PHR Web Portal (Patient).

Additional SU/FA Responsibilities

- Update or change PHR user passwords upon request.
- Unlink PHR patient access.
- Respond to other PHR user help requests.
- Update the RPMS PHR Access field.

PHR Registrar Roles

- Process PHR applications (patients).
- Read patient profile information.
- Update or unlink PHR patient access.
- Generate Audit Reports.
- Reset own password.
- Unlimited number of PHR registrars.

PHR Registrar Responsibilities

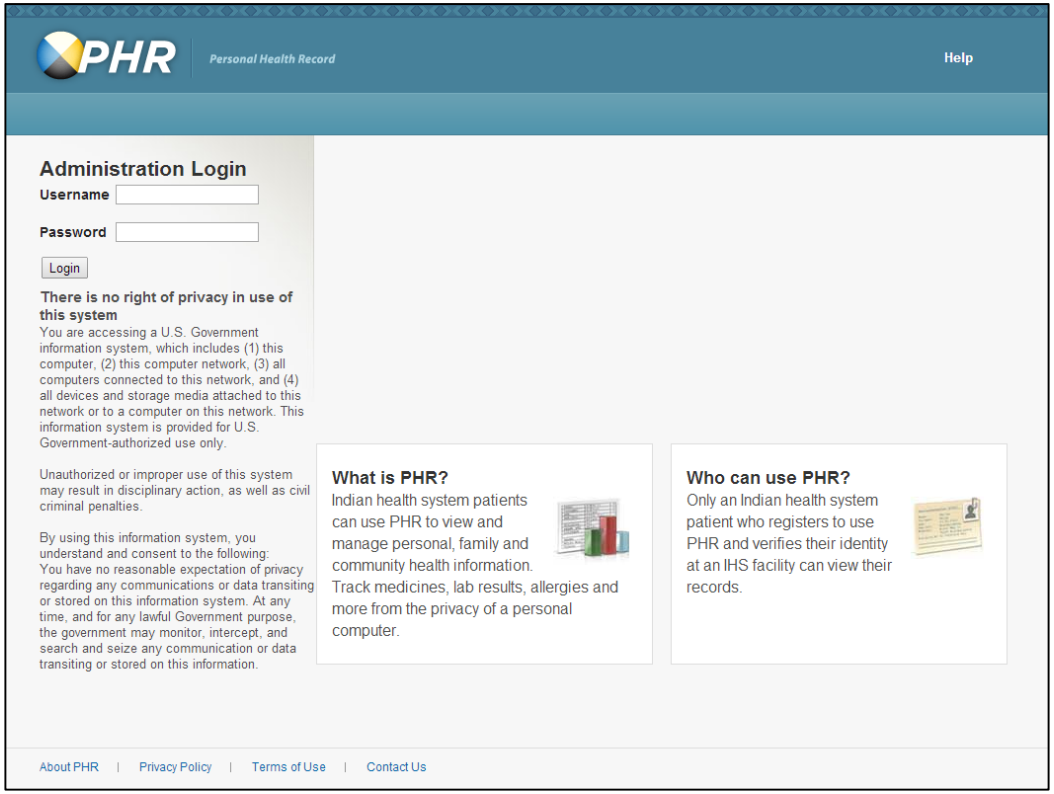
- Verify registered PHR users (patient) identity.
- Process PHR applications:
  - Matching and linking PHR accounts with IHS medical records.
- Process additional requests for PHR access:
  - Minors, elderly, and mentally disabled.
- Update or change PHR user passwords upon request.
- Update or unlink PHR patient access.
- Verify patient can access their PHR.
- Review PHR materials with patients.
- Respond to other PHR user help requests.
- Update EHR patient access.

PHR Admin Web Portal Overview

PHR Administrator Functions

- Role-based administrator functions:
  - Area Administrator:
    - Create & manage administrator accounts:
      - Area-Wide SU/FA and PHR Registrars.
    - Area-wide audit reports.
    - Manage patients.
  - SU/F Administrator:
    - Create & manage administrator accounts:
      - SU/F PHR Registrars.
    - SU/F audit reports.
  - PHR Registrar:
    - Process PHR applications.
    - SU/F audit reports.
- Common administrator functions:
  - Manage patients.
  - Update account profile.

PHR Administrator Web Portal



Location: https://phradmin.ihs.gov.

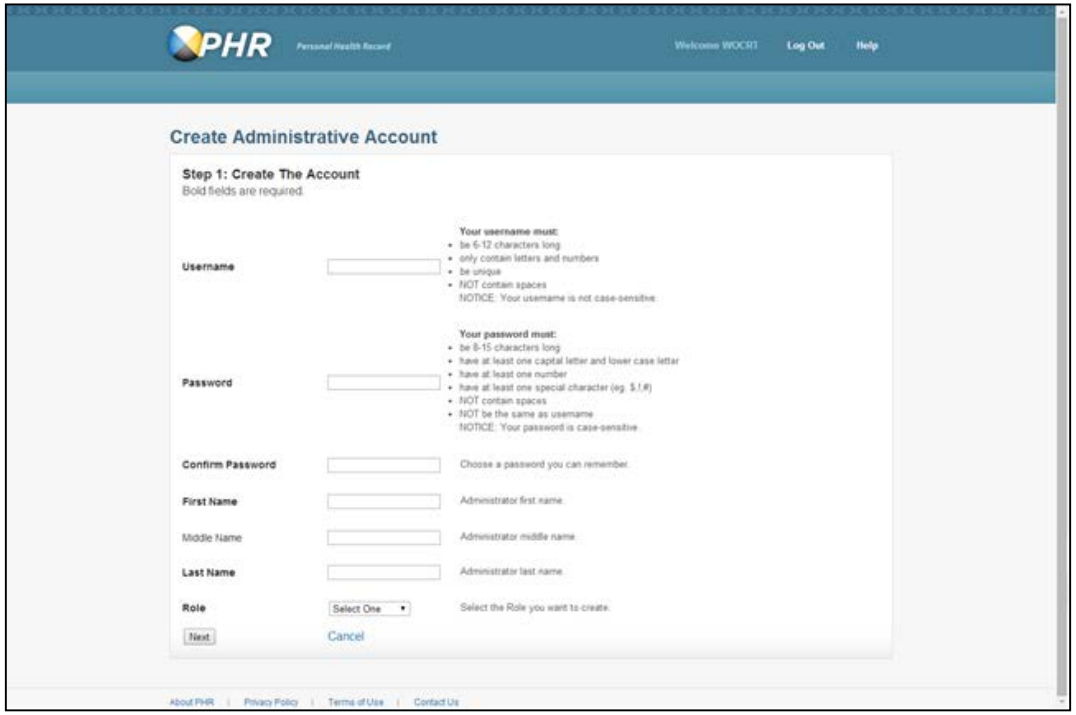
Administrator Role-Based Functions

Area and SU/FA Home Page

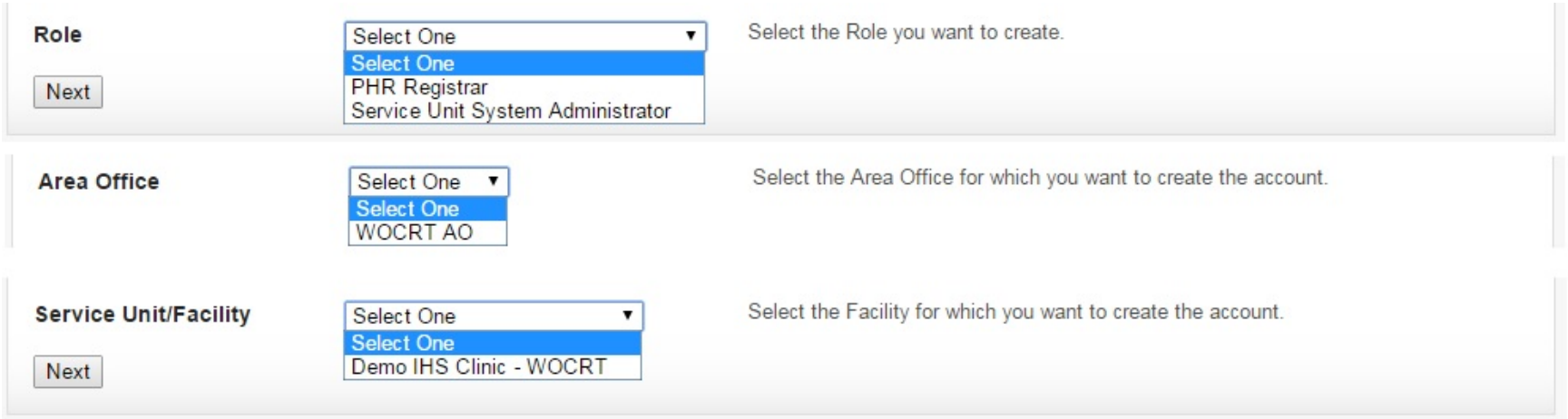
PHR Registrar Home Page

Create Administrative Accounts

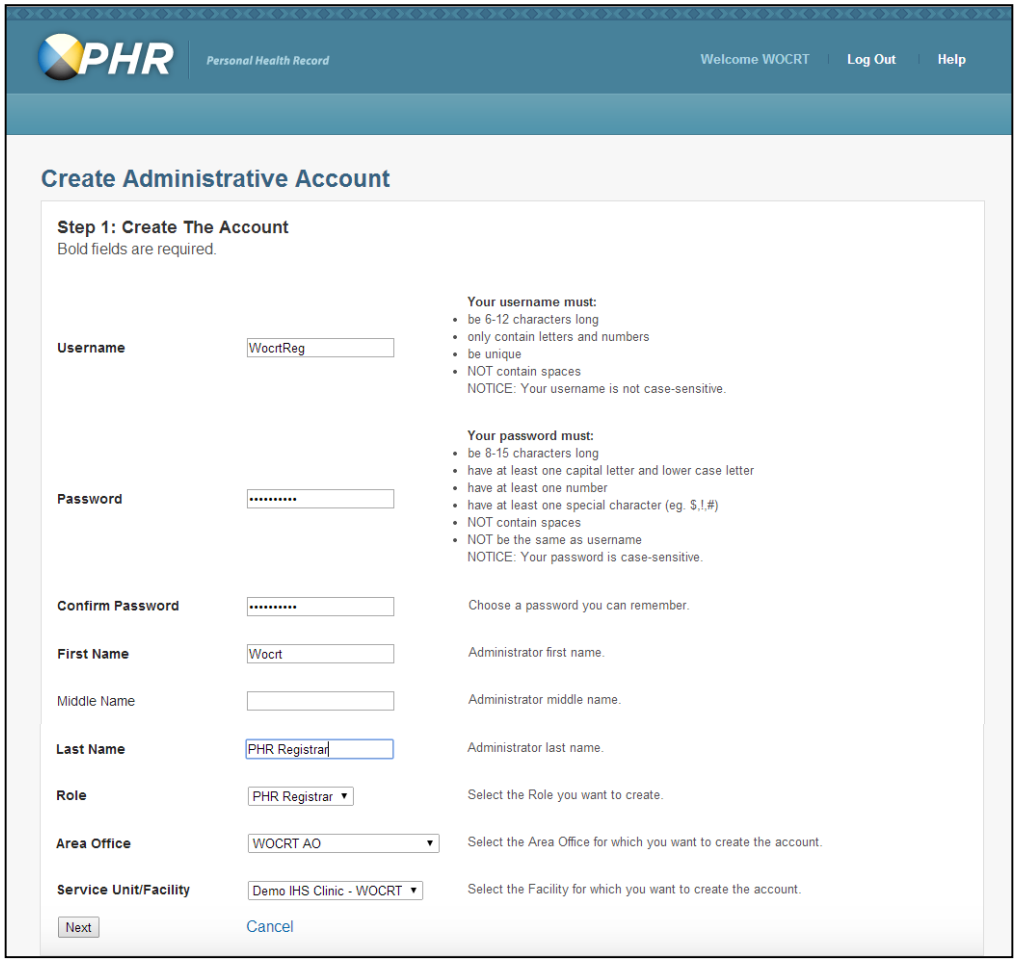
- **Create Account** tab.
- Items in bold are required.



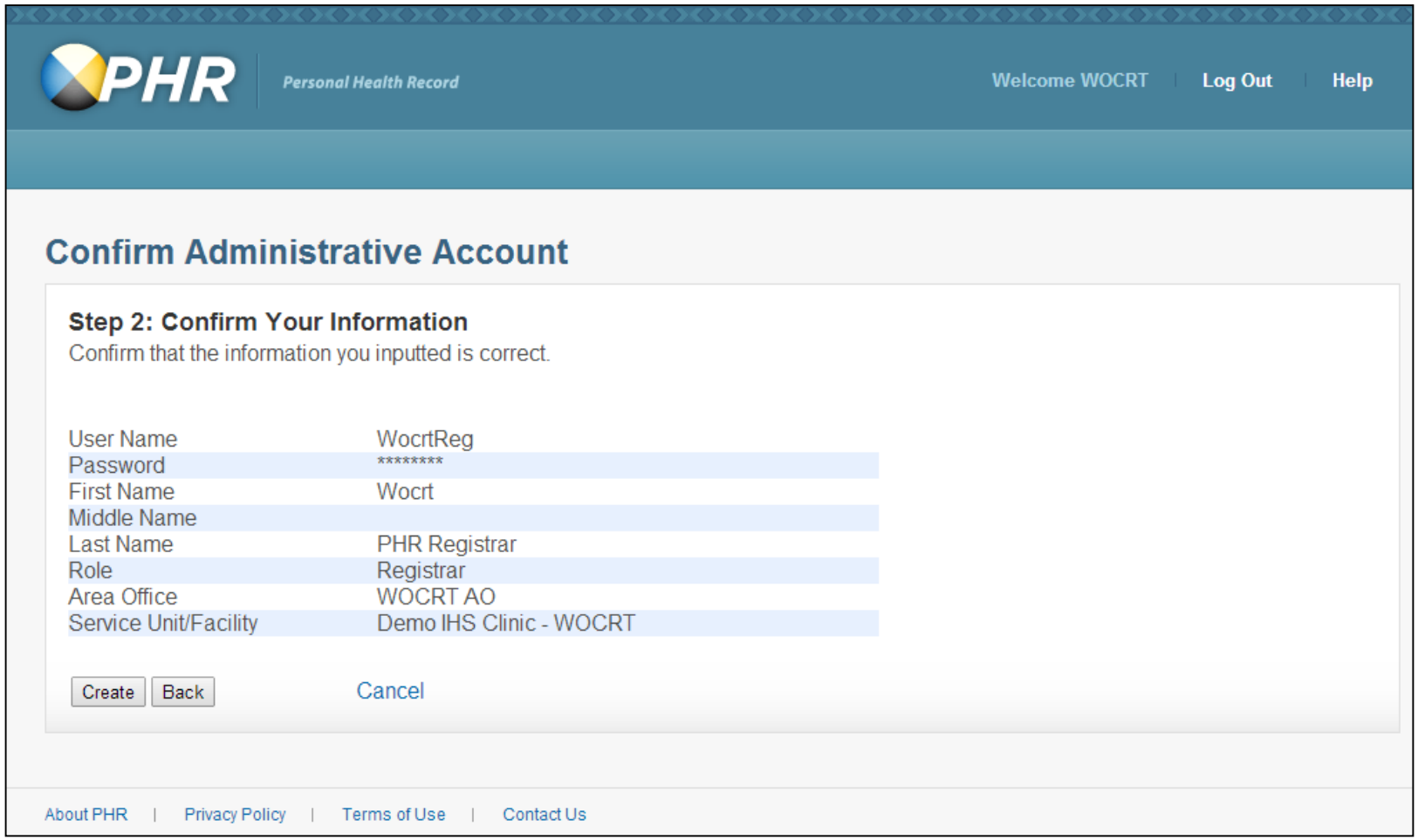
Role, Area Office, and SU/F Fields



Completed Create Account Form

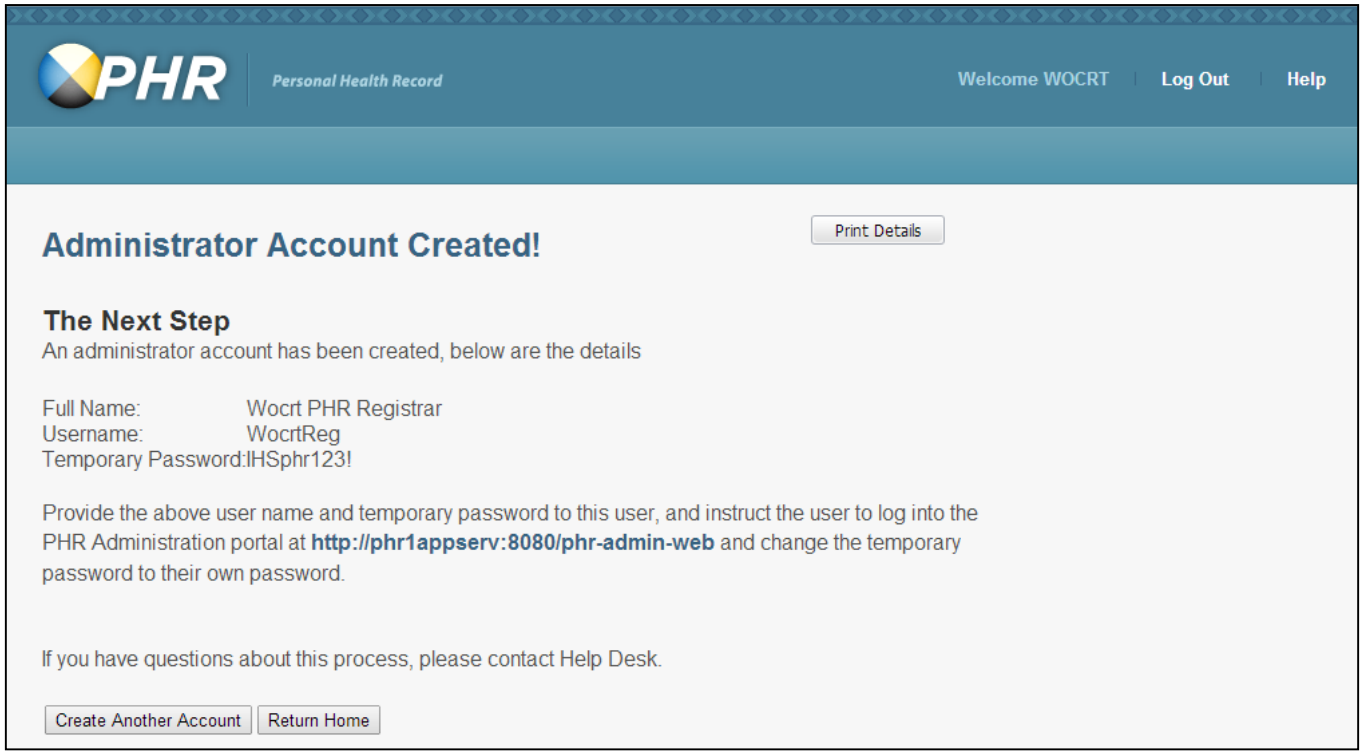


Confirm Administrative Account



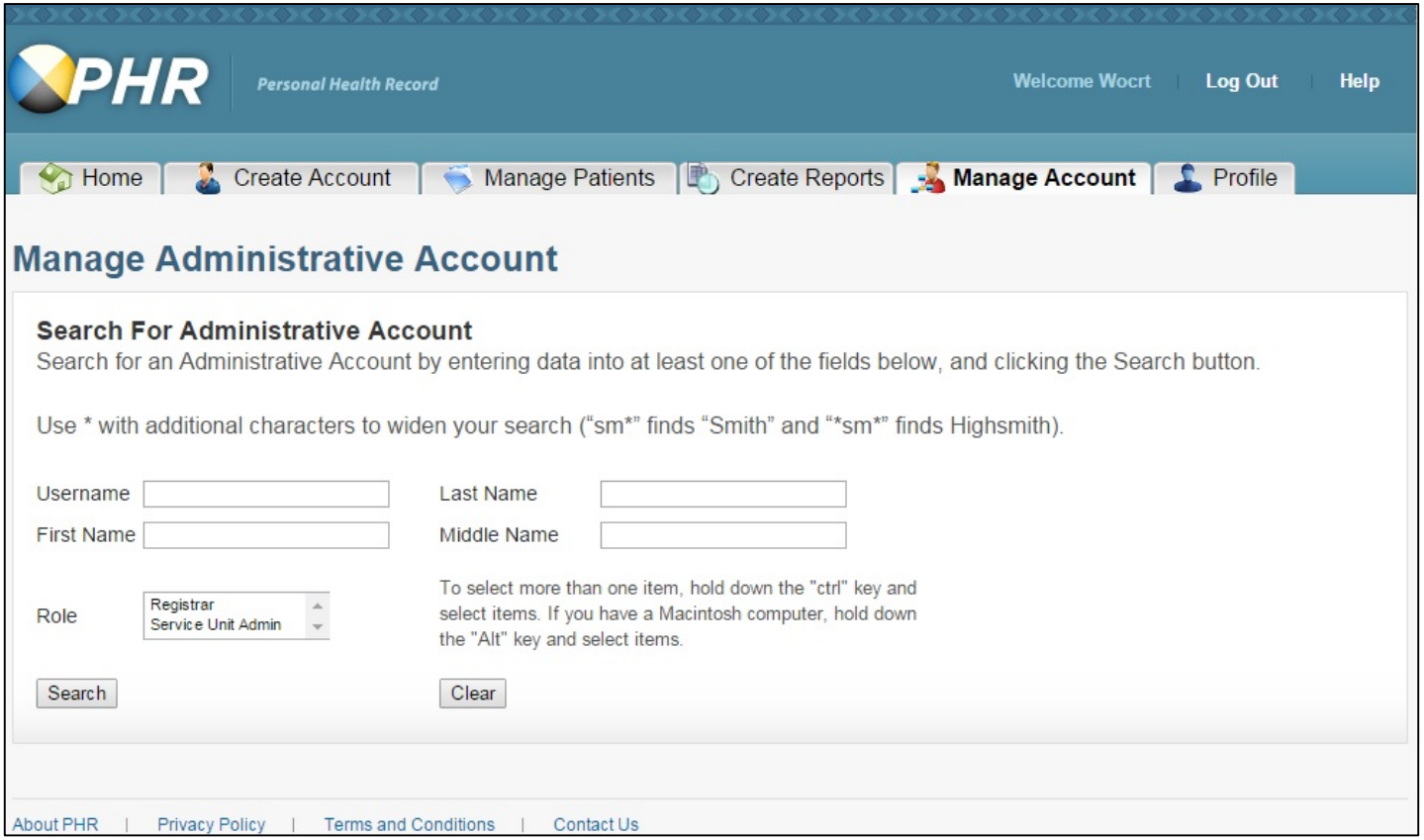
Administrator Account Created

- Ability to print (use caution).
- Best method – personally deliver.



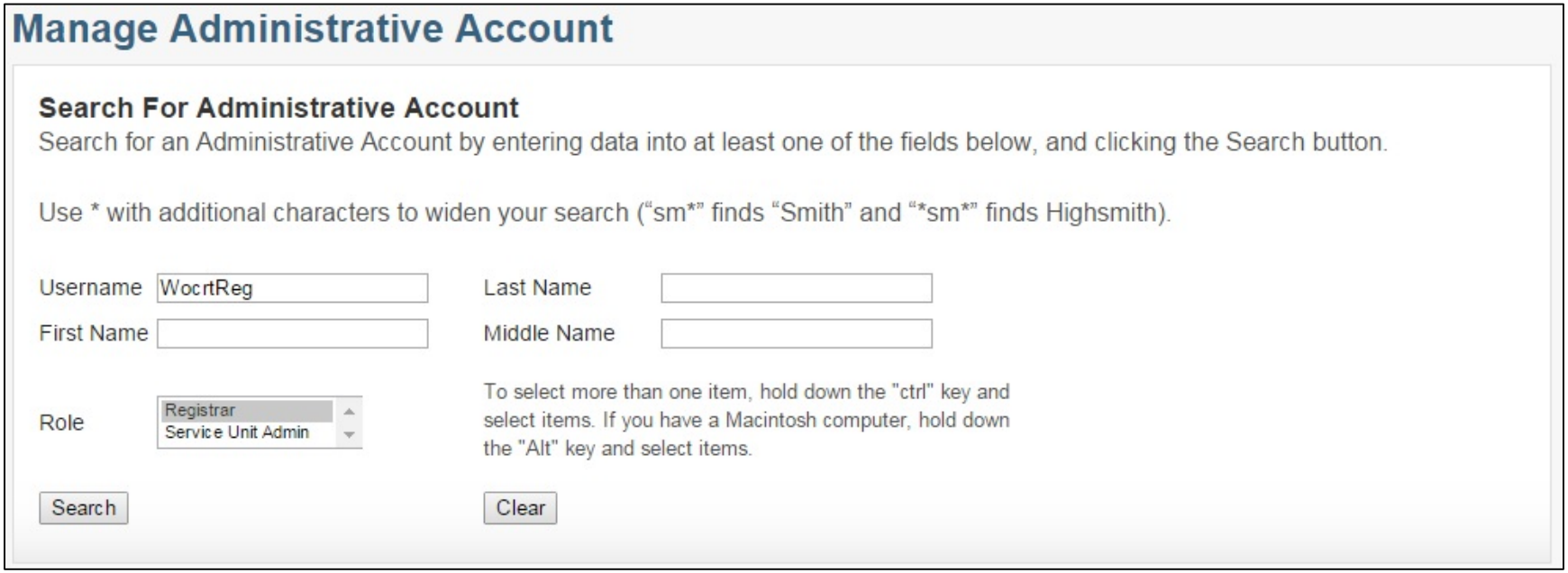
Manage Administrative Accounts

- **Manage Account** tab.



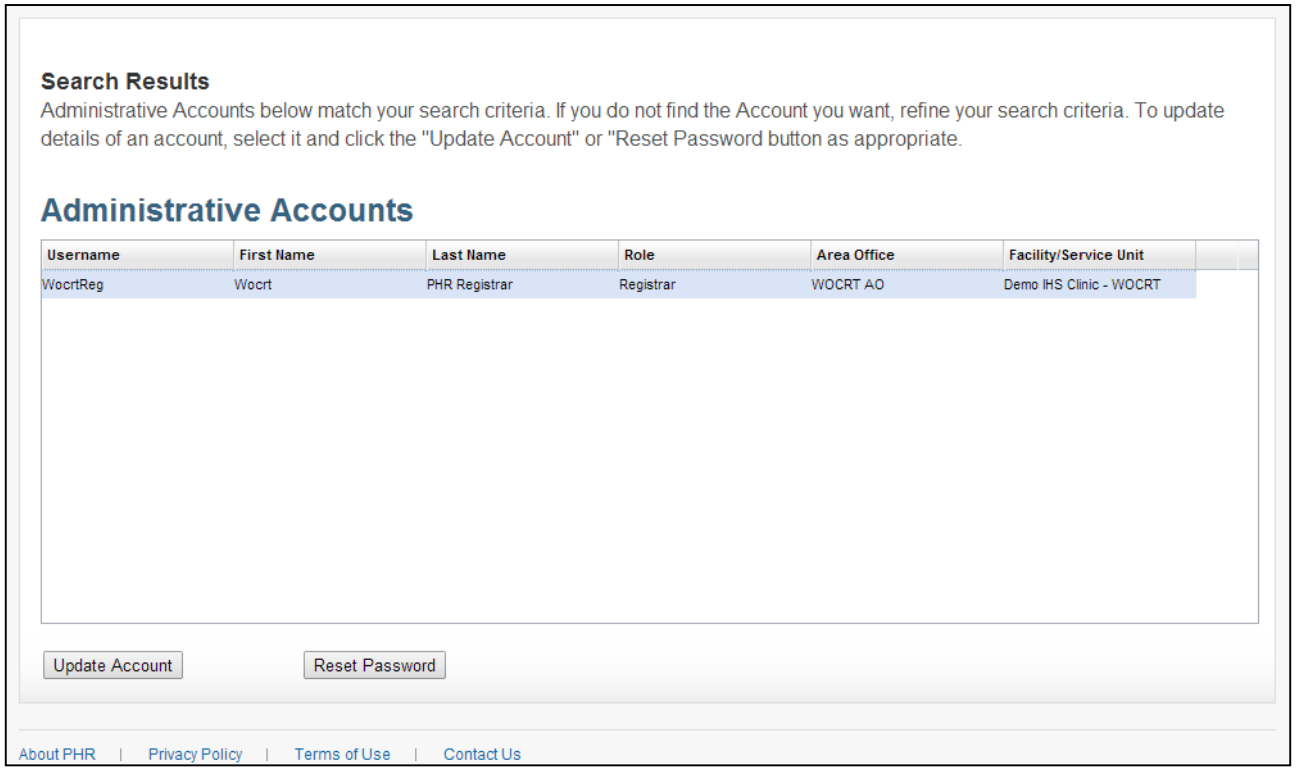
Search Administrative Accounts

1. Enter search criteria.
2. Click **Search**.



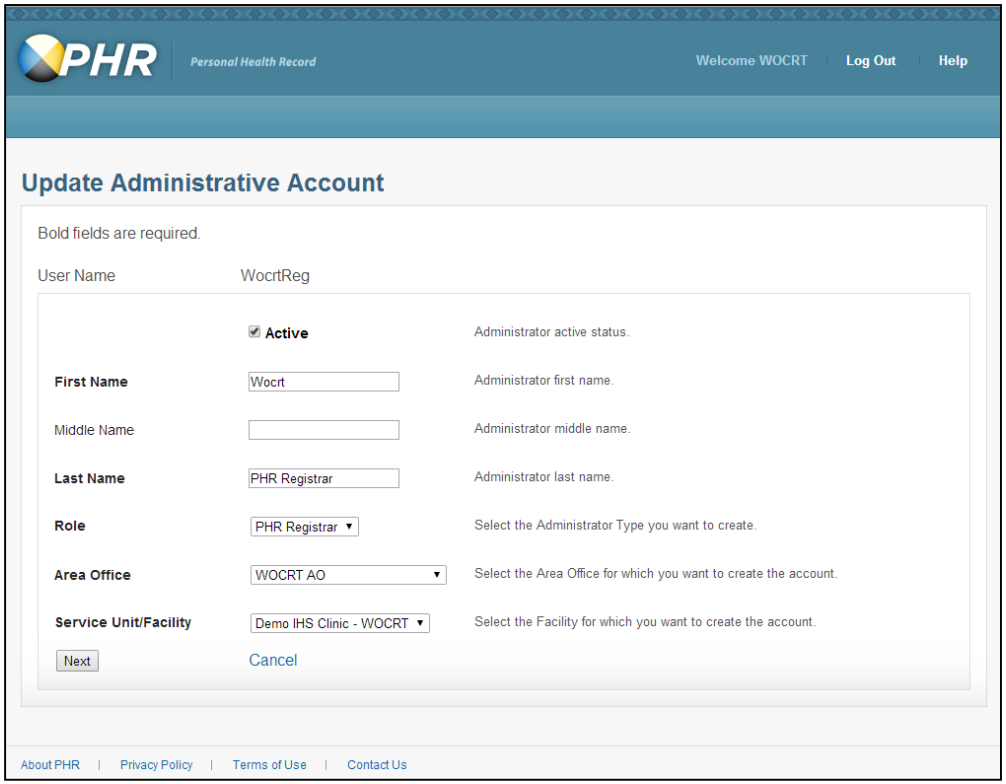
Manage Account Search Results

- Displays the following search for the **Administrative Accounts** pane.



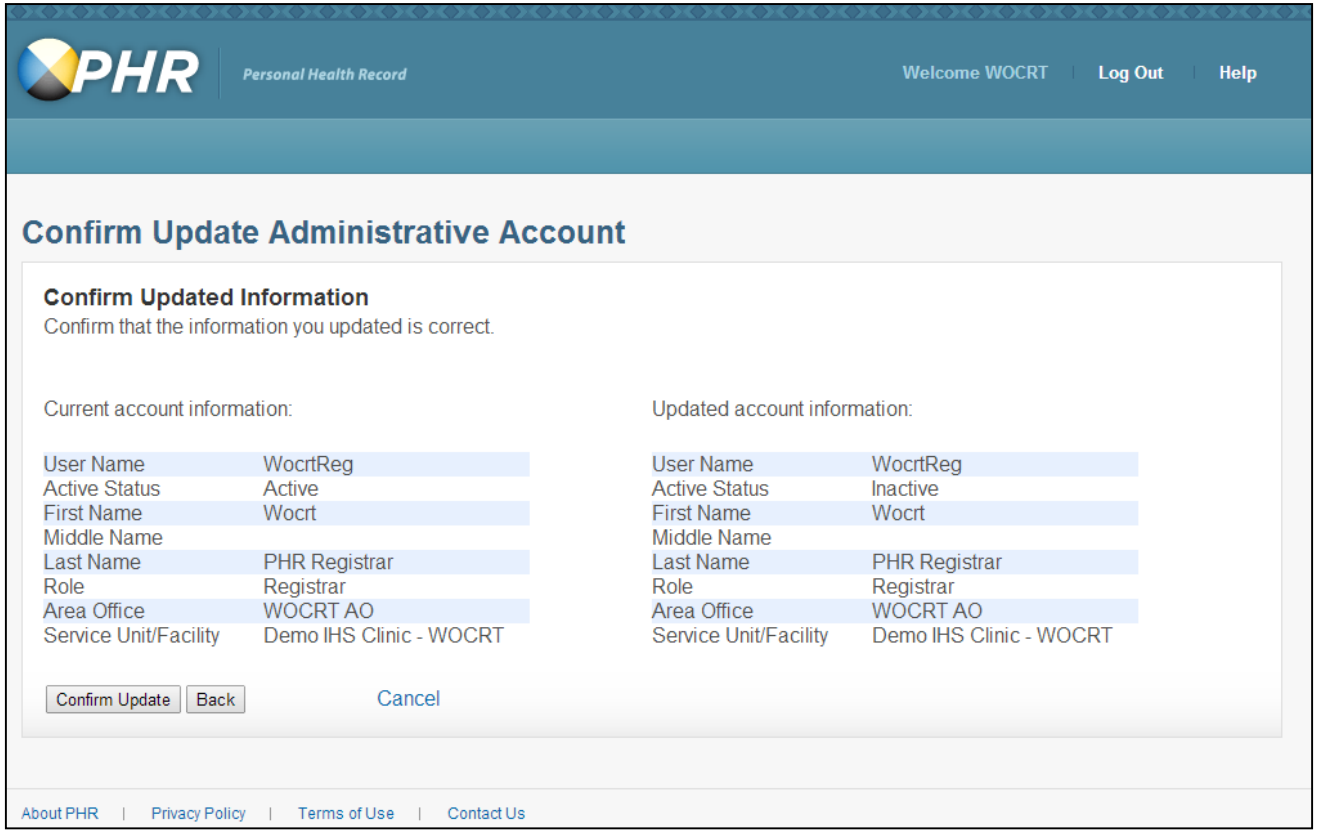
Update Administrative Account

- Items in bold are required.



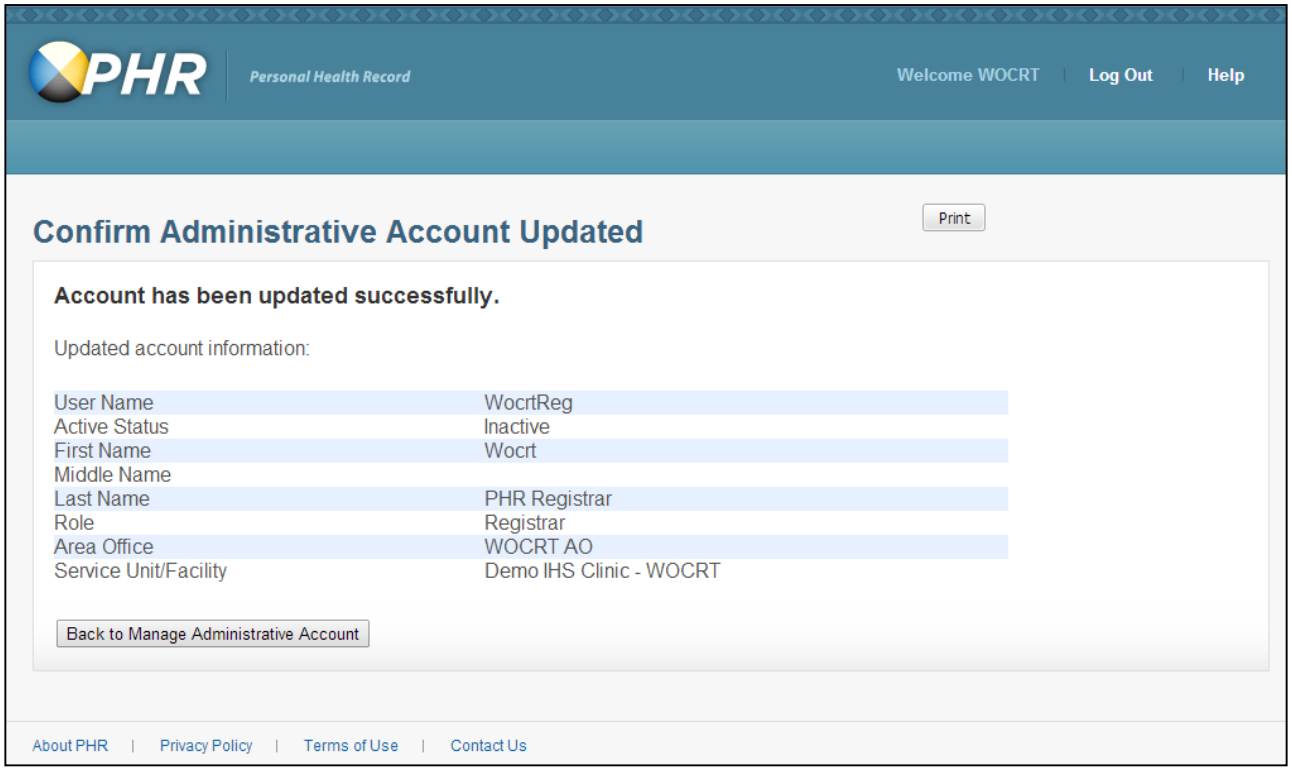
Confirm Account Update

- Current and Updated account comparison.



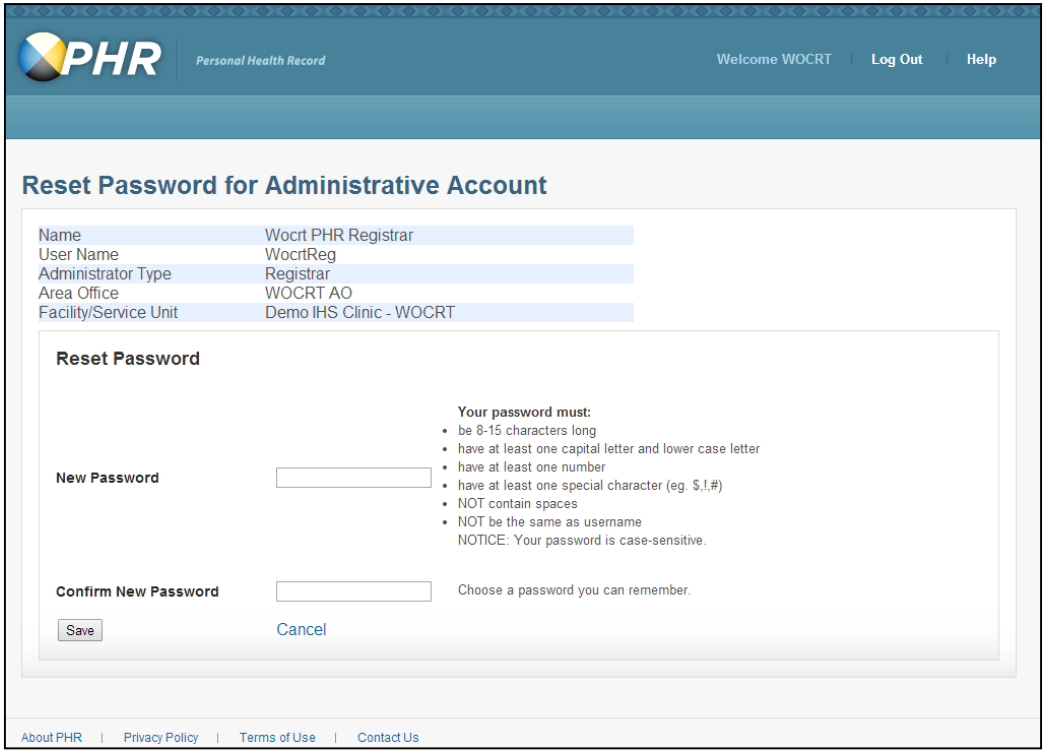
Administrative Account Updated

- Ability to print (use caution).
- Best method – personally deliver.



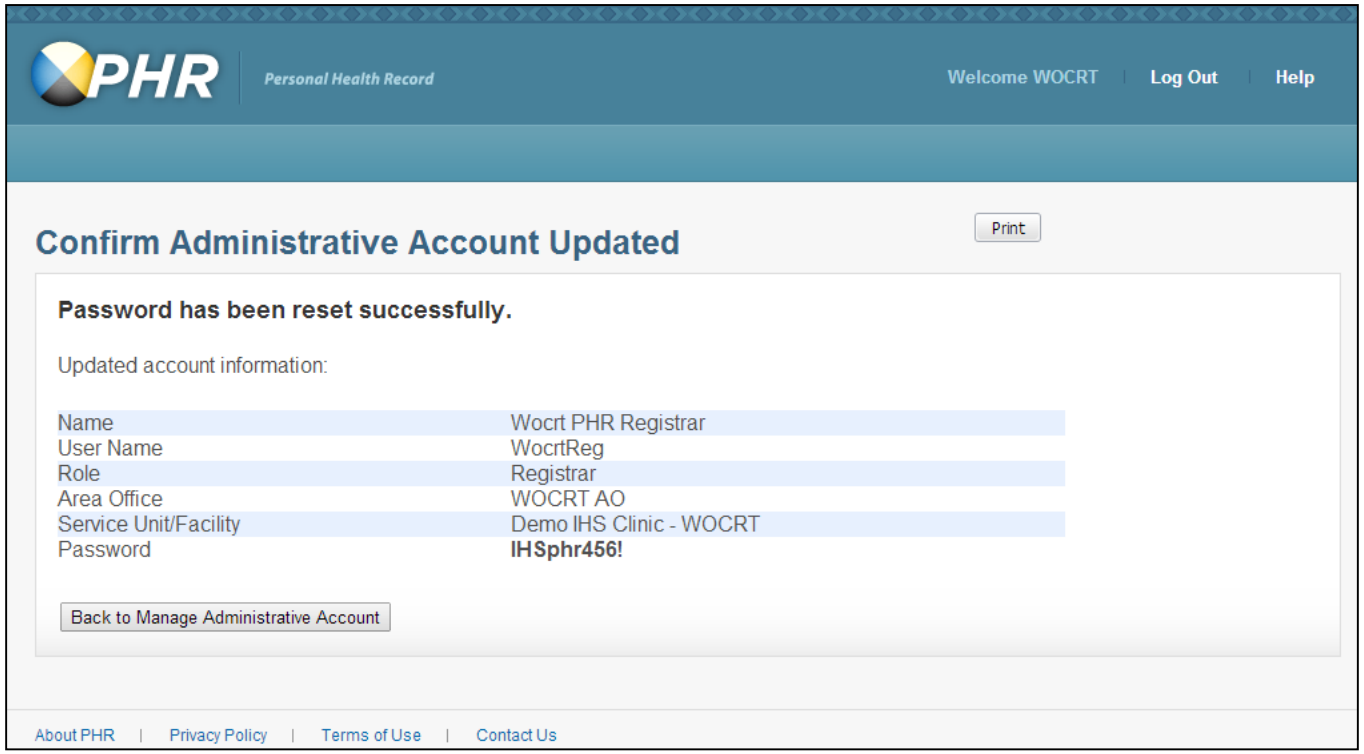
Reset Admin Password

- Items in bold are required.
- Must meet password complexity requirements.



Confirm Admin Password Reset

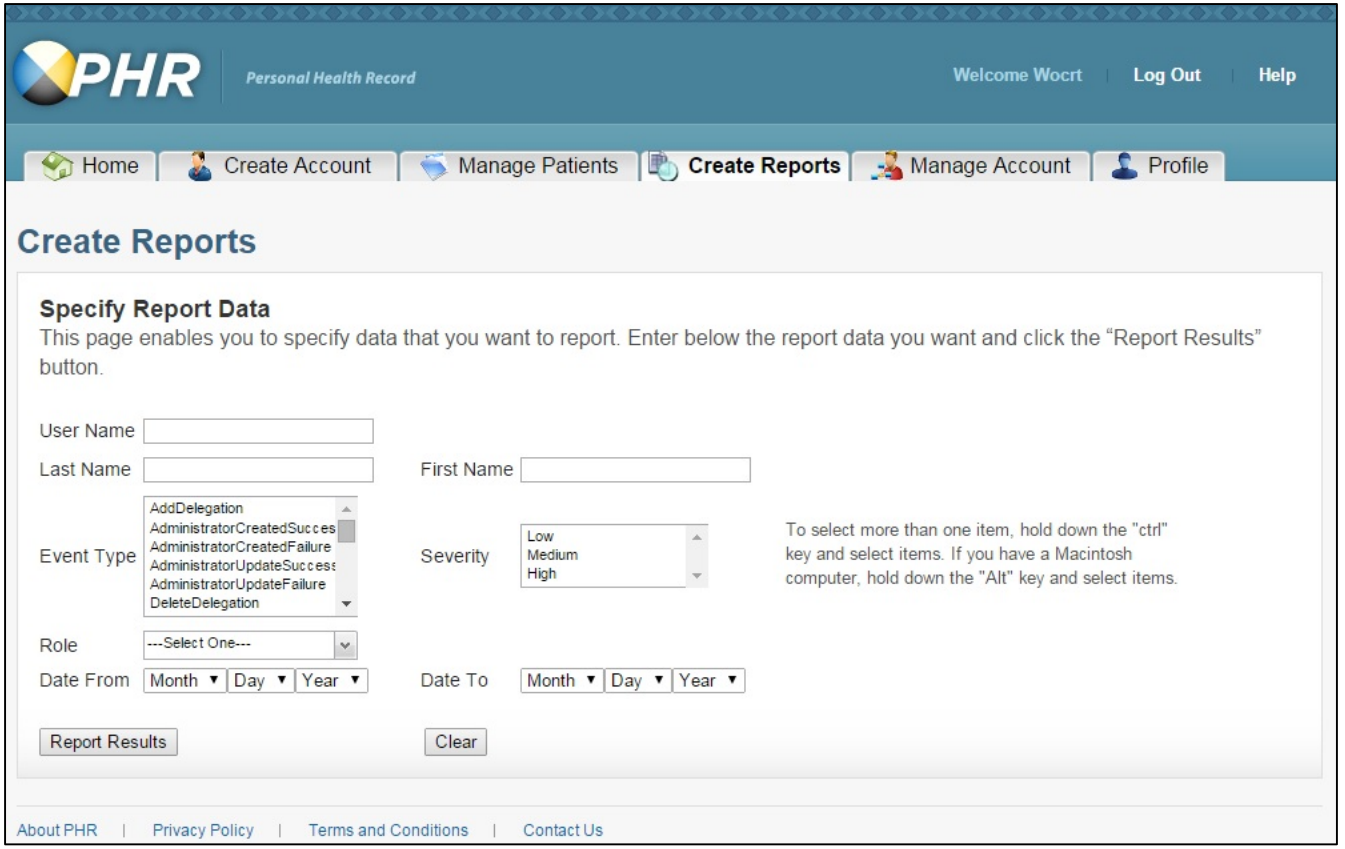
- Ability to print (use caution).
- Best method – personally deliver.



Audits

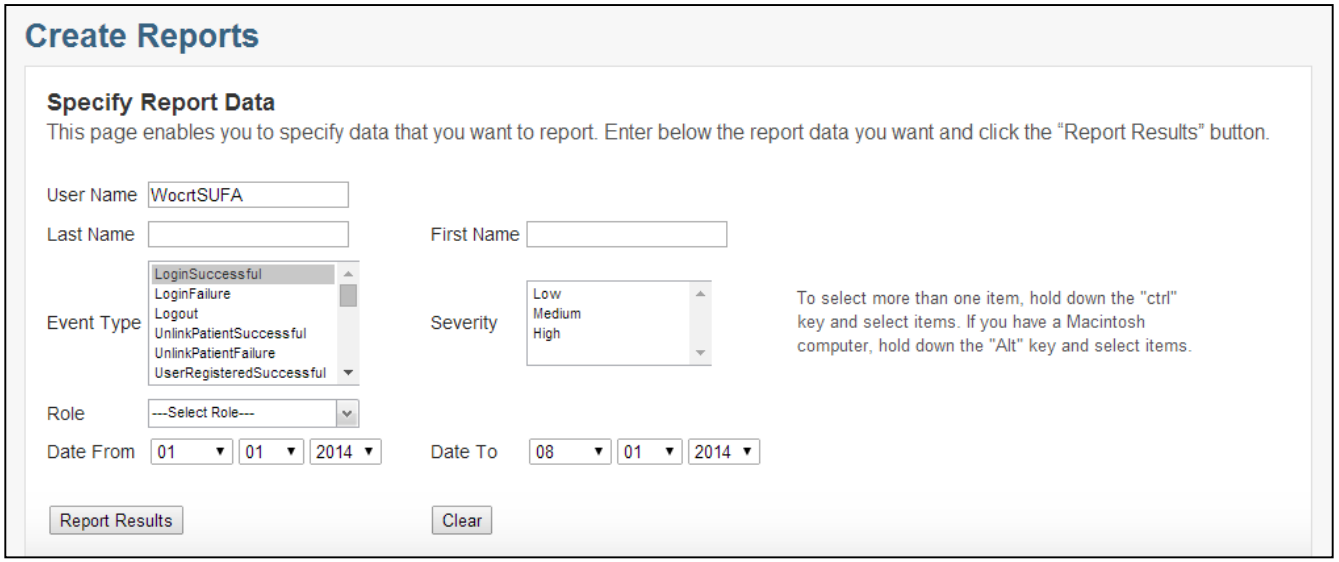
Audit Reports

- **Create Reports** tab.



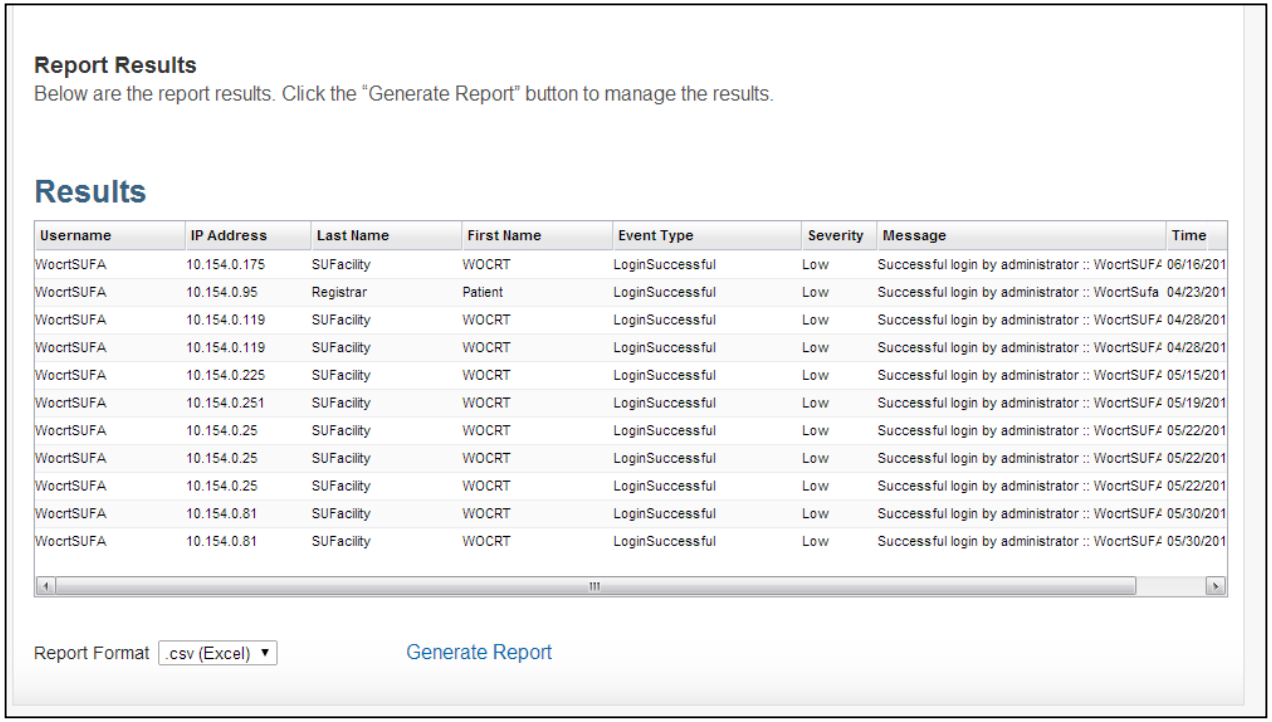
Create Reports Search Criteria

- Enter at least one criteria.
- Multiple to narrow the search.
- Not all reports return results:
  - For example **Event Type** and **Severity** may not match.



Audit Report Results

- Displays below the **Specify Report Data** pane.
- Export/generate report to .csv file.



Report Results

Below are the report results. Click the "Generate Report" button to manage the results.

Results

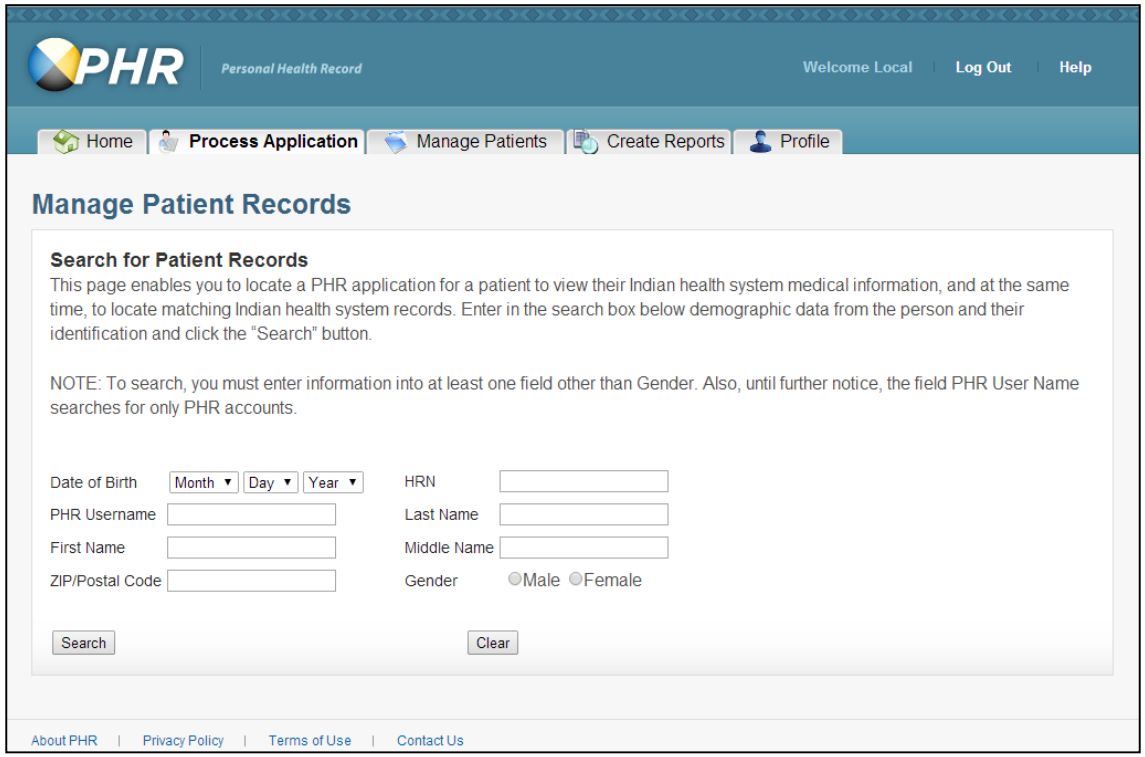
Username	IP Address	Last Name	First Name	Event Type	Severity	Message	Time
WocrtSUFA	10.154.0.175	SUFacility	WOCRT	LoginSuccessful	Low	Successful login by administrator :: WocrtSUFA	06/16/201
WocrtSUFA	10.154.0.95	Registrar	Patient	LoginSuccessful	Low	Successful login by administrator :: WocrtSufa	04/23/201
WocrtSUFA	10.154.0.119	SUFacility	WOCRT	LoginSuccessful	Low	Successful login by administrator :: WocrtSUFA	04/28/201
WocrtSUFA	10.154.0.119	SUFacility	WOCRT	LoginSuccessful	Low	Successful login by administrator :: WocrtSUFA	04/28/201
WocrtSUFA	10.154.0.225	SUFacility	WOCRT	LoginSuccessful	Low	Successful login by administrator :: WocrtSUFA	05/15/201
WocrtSUFA	10.154.0.251	SUFacility	WOCRT	LoginSuccessful	Low	Successful login by administrator :: WocrtSUFA	05/19/201
WocrtSUFA	10.154.0.25	SUFacility	WOCRT	LoginSuccessful	Low	Successful login by administrator :: WocrtSUFA	05/22/201
WocrtSUFA	10.154.0.25	SUFacility	WOCRT	LoginSuccessful	Low	Successful login by administrator :: WocrtSUFA	05/22/201
WocrtSUFA	10.154.0.25	SUFacility	WOCRT	LoginSuccessful	Low	Successful login by administrator :: WocrtSUFA	05/22/201
WocrtSUFA	10.154.0.81	SUFacility	WOCRT	LoginSuccessful	Low	Successful login by administrator :: WocrtSUFA	05/30/201
WocrtSUFA	10.154.0.81	SUFacility	WOCRT	LoginSuccessful	Low	Successful login by administrator :: WocrtSUFA	05/30/201

Report Format .csv (Excel) ▾ Generate Report

Process Patient PHR Applications

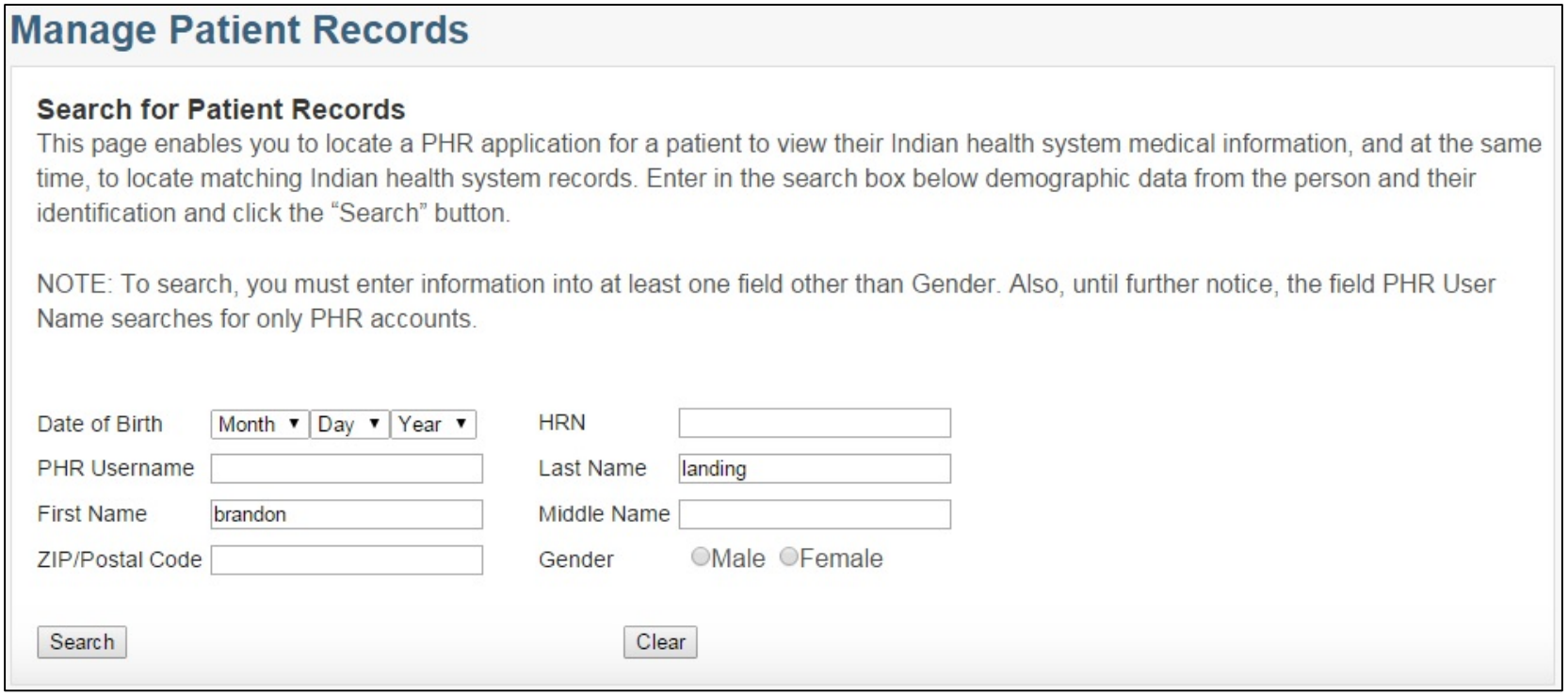
Process PHR Applications

- PHR Registrar only.
- **Process Application** tab.



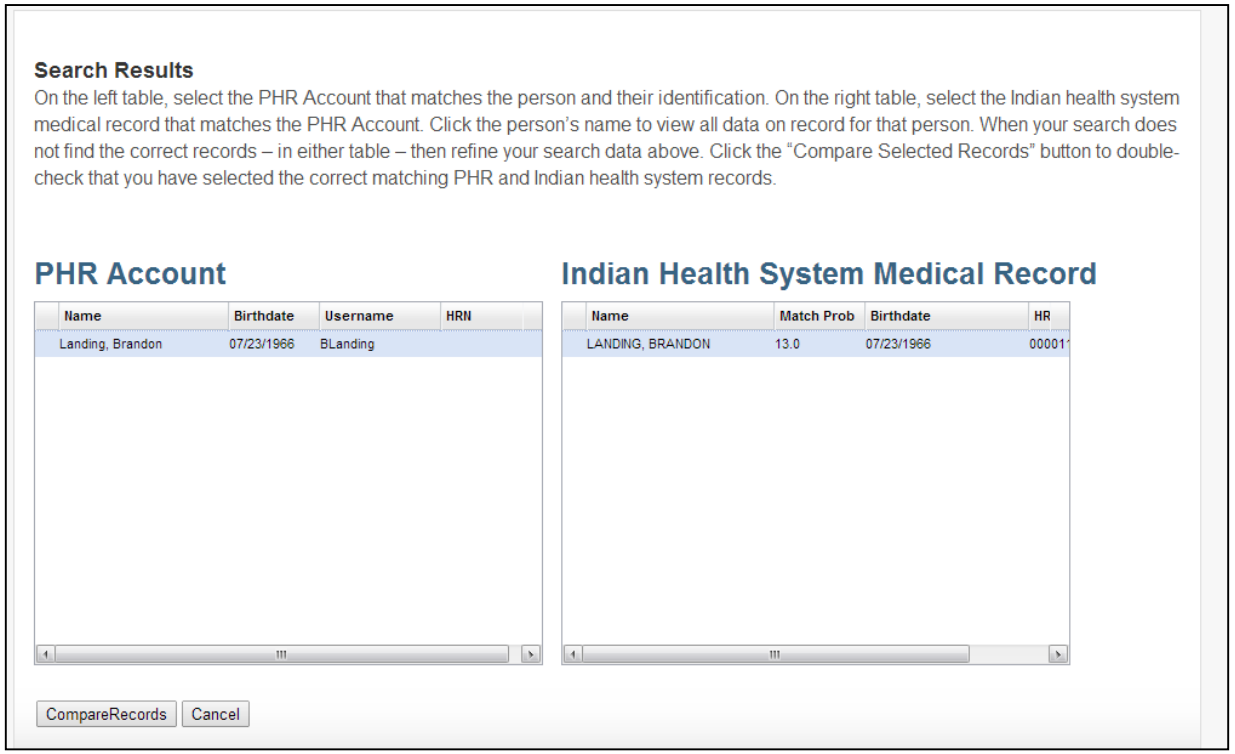
Search for Patient Records

1. Enter search criteria (min: **Last Name** and **First Name**).
2. Click **Search**.



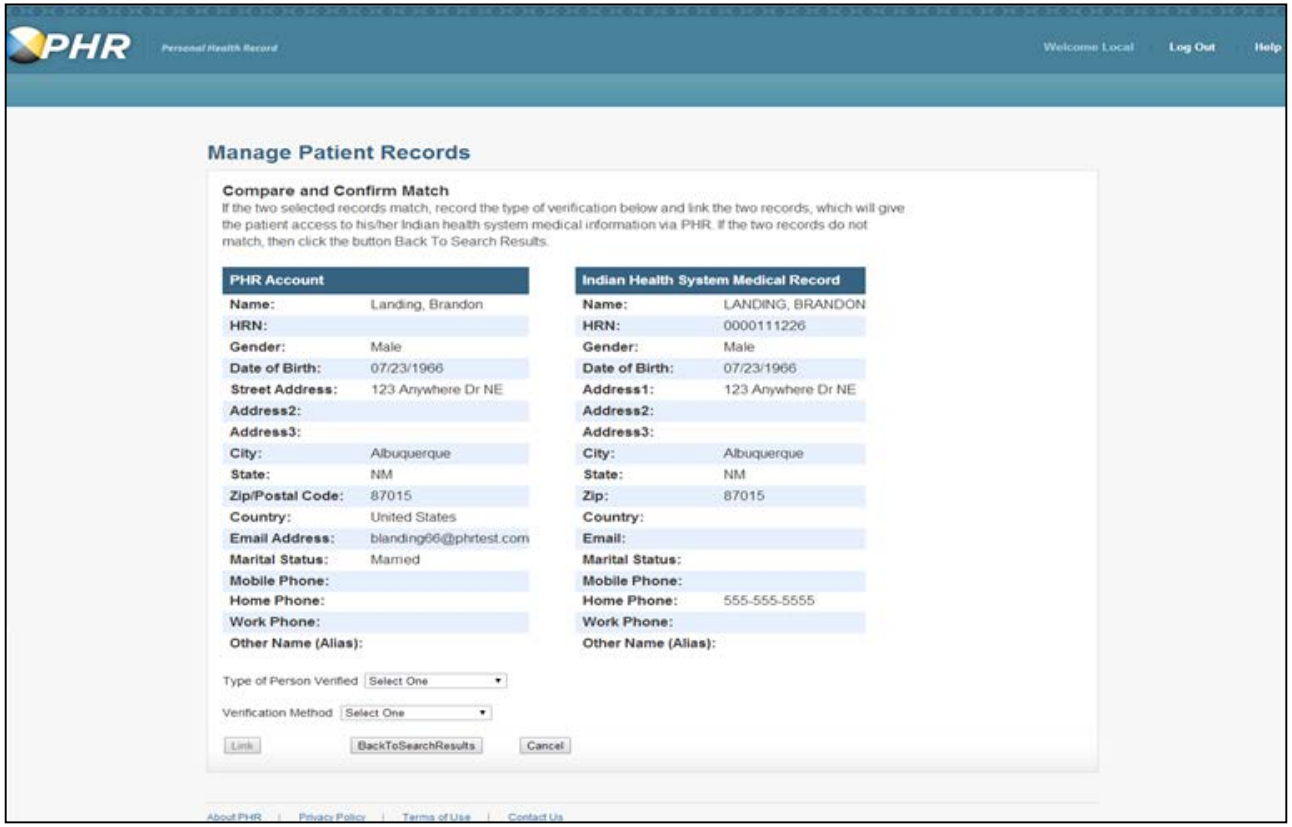
Patient Records Search Results

- Displays Below the **Manage Patient Records** pane.
- Highlight matching records to compare records.



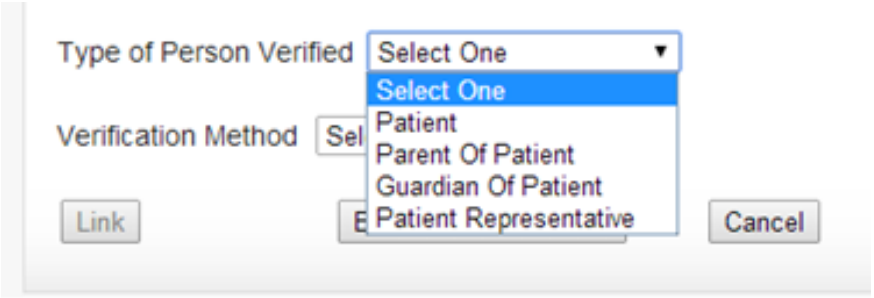
Compare and Confirm Records

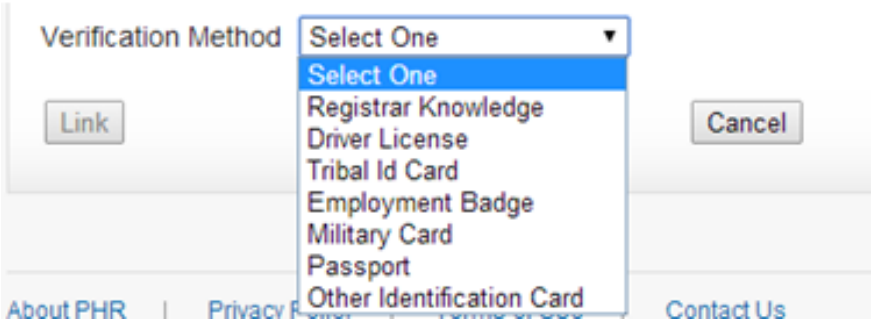
- Verify that records match.



Person and Verification Selection

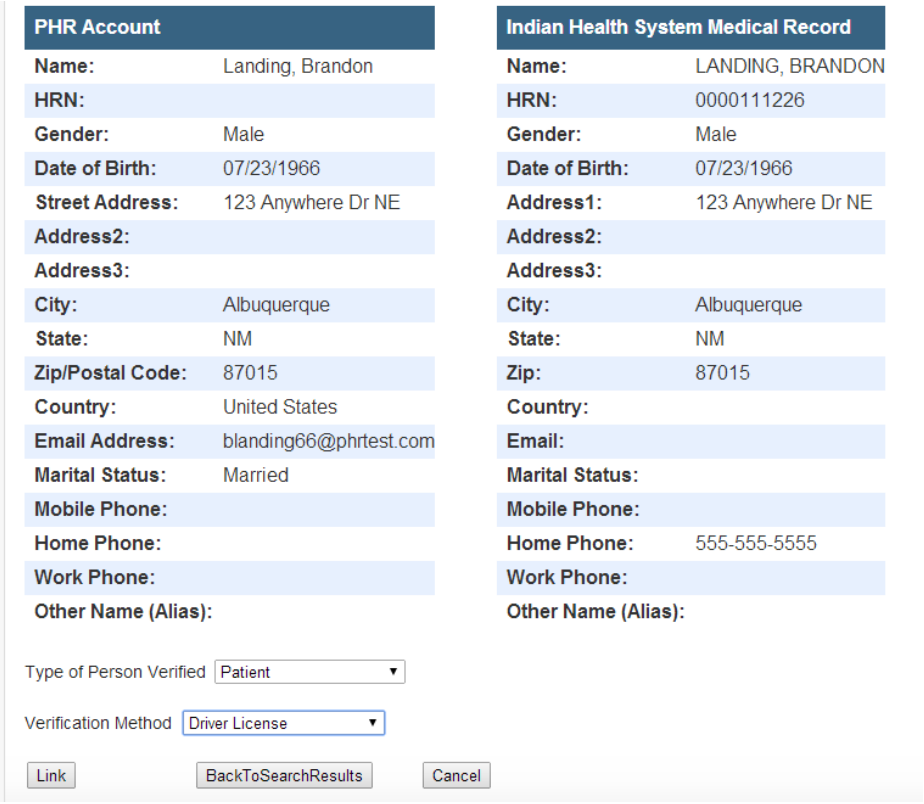
- **Type of Person Verified**.
- **Verification Method**.





Link Records

- Click **Link**.



PHR Account	
Name:	Landing, Brandon
HRN:	
Gender:	Male
Date of Birth:	07/23/1966
Street Address:	123 Anywhere Dr NE
Address2:	
Address3:	
City:	Albuquerque
State:	NM
Zip/Postal Code:	87015
Country:	United States
Email Address:	blanding66@phrtest.com
Marital Status:	Married
Mobile Phone:	
Home Phone:	
Work Phone:	
Other Name (Alias):	

Indian Health System Medical Record	
Name:	LANDING, BRANDON
HRN:	0000111226
Gender:	Male
Date of Birth:	07/23/1966
Address1:	123 Anywhere Dr NE
Address2:	
Address3:	
City:	Albuquerque
State:	NM
Zip:	87015
Country:	
Email:	
Marital Status:	
Mobile Phone:	
Home Phone:	555-555-5555
Work Phone:	
Other Name (Alias):	

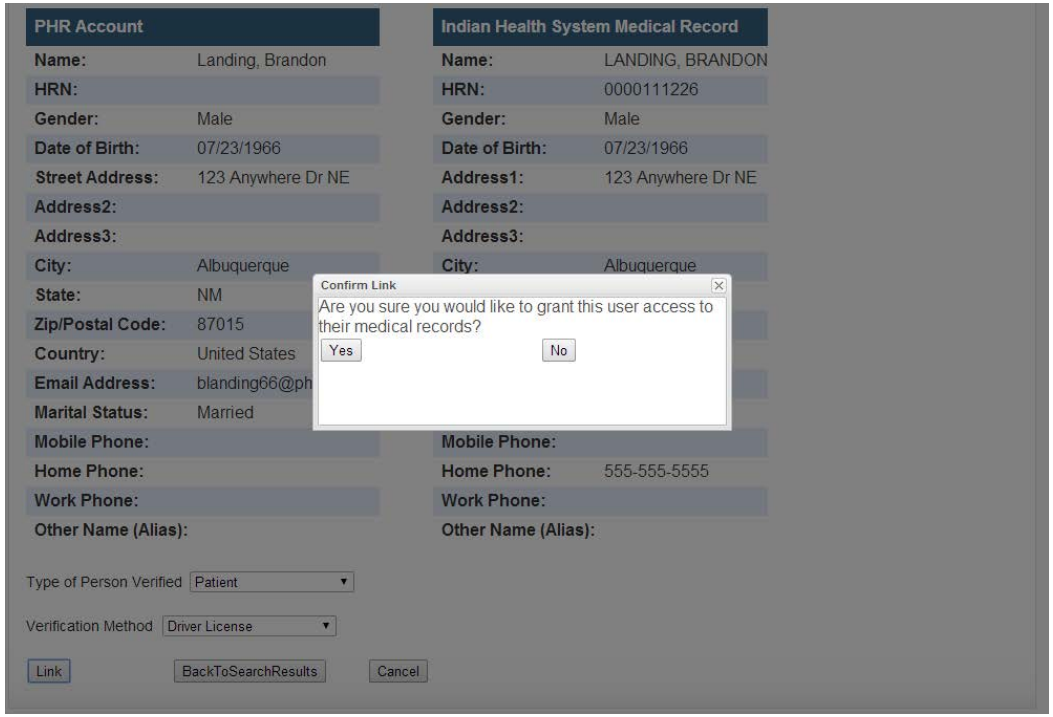
Type of Person Verified: Patient

Verification Method: Driver License

Link | BackToSearchResults | Cancel

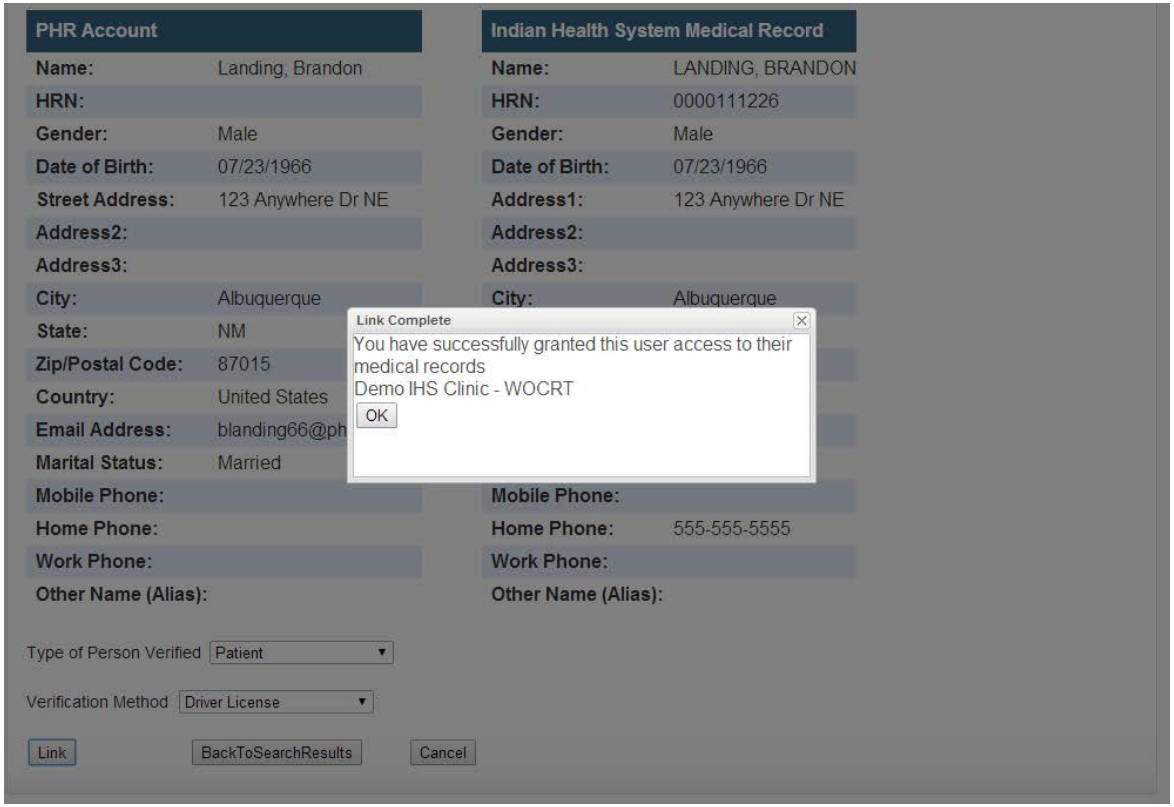
Confirm Link Records

- Click **Yes** to continue.
- Click **No** to return to page.



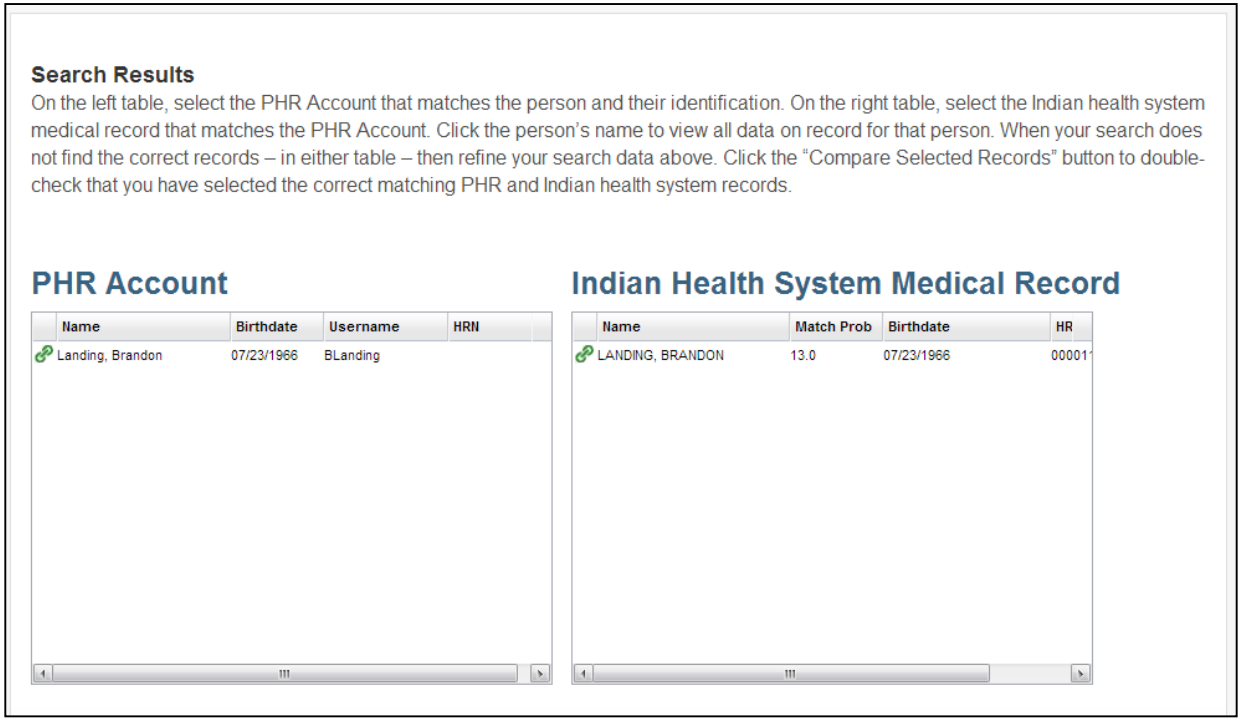
Link Records Complete

- Click **OK** to continue.



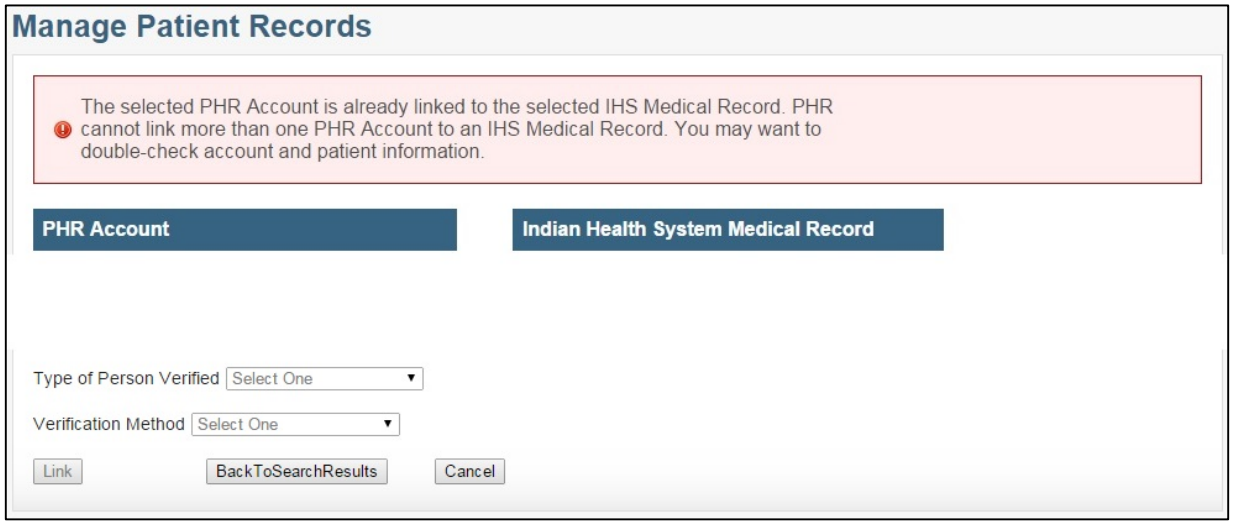
Verify Link Records

- Back to **Search Results**.
- Chain link icons.



Already Linked Message

- Select patient with chain link icon.
- Cannot link records.
- Comparing a linked record and non-linked record:
  - Similar message and cannot link records.



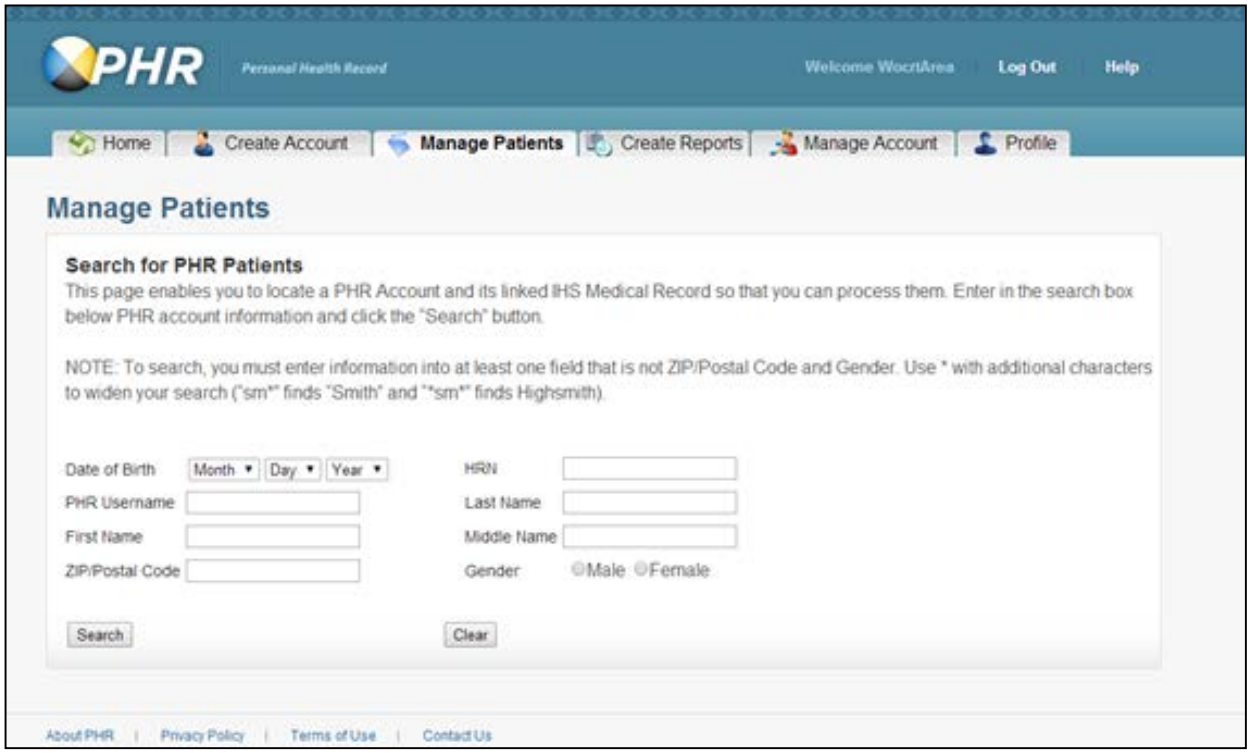
Processing Applications for Minors

- Complete the IHS 810 Form.
- Provider approves access to minor's PHR.
- Register to Use PHR:
  - Already exists – reset password.
- Record minor's username and password:
  - IHS 810 Form.
- Verify identity of approved individual.
- Process application.
- Verify minor's PHR.
- Grant access to minor's PHR.

Administrator Common Functions

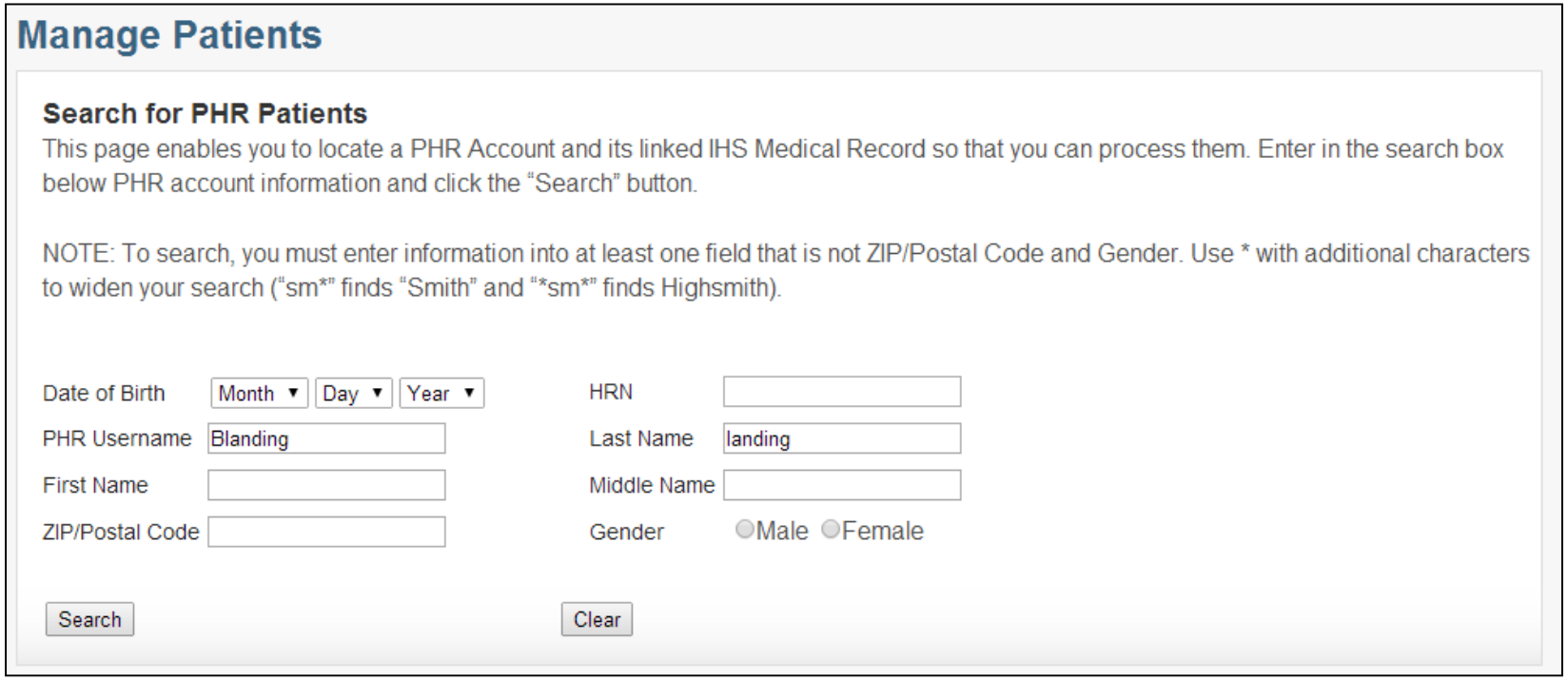
Manage Patient PHR Accounts

- **Manage Patients** tab.



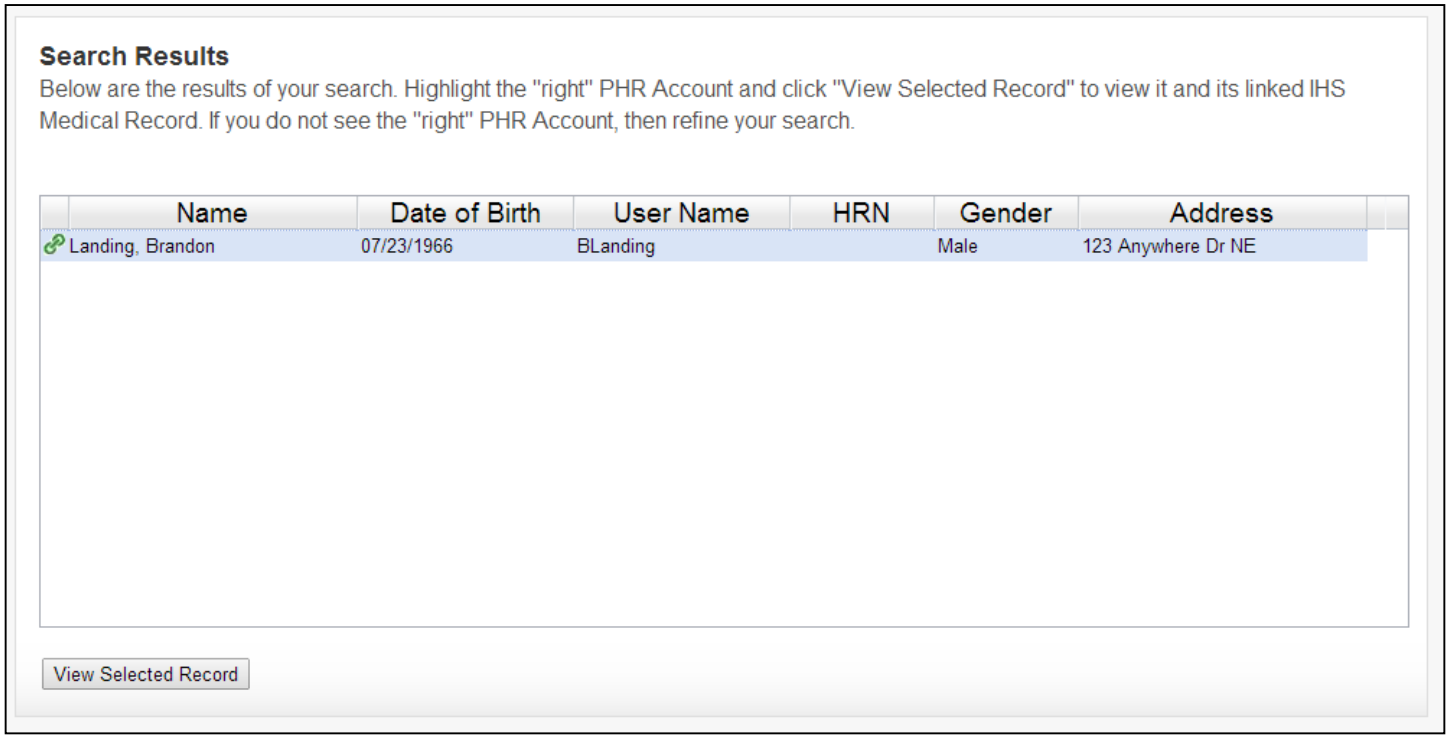
Search Patient PHR Accounts

- Enter search criteria.
- Click **Search**.



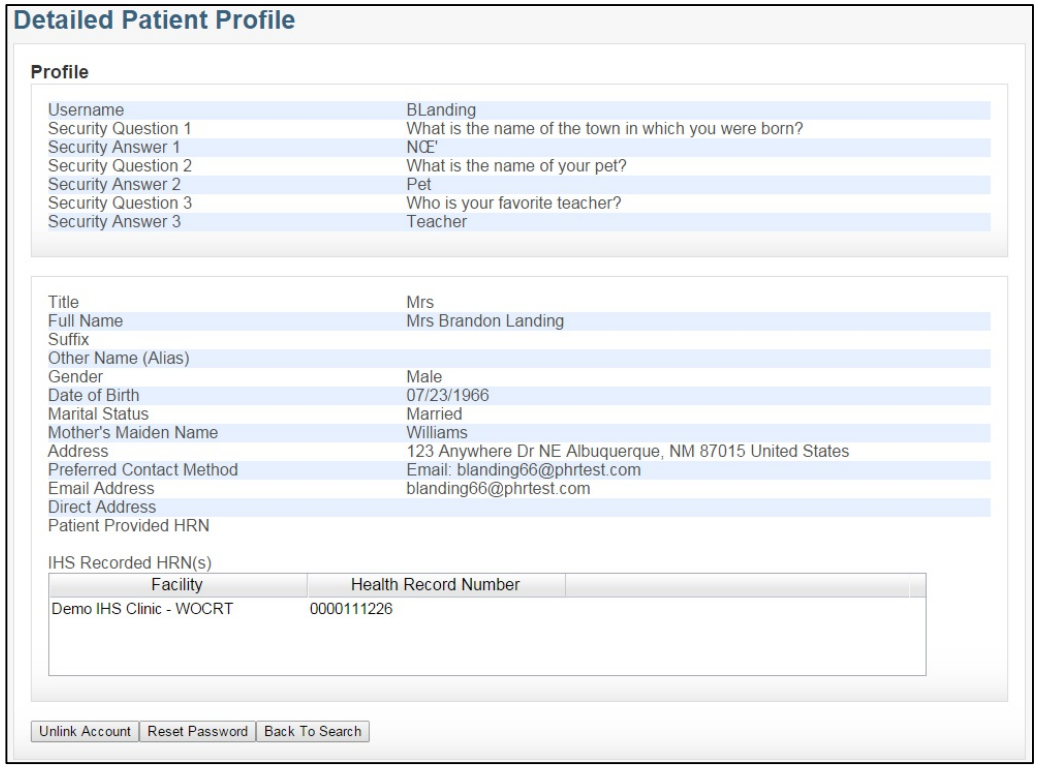
Manage Patients Search Results

- Displays below the **Search for PHR Patients** pane.
- Linked patient – chain link icon.



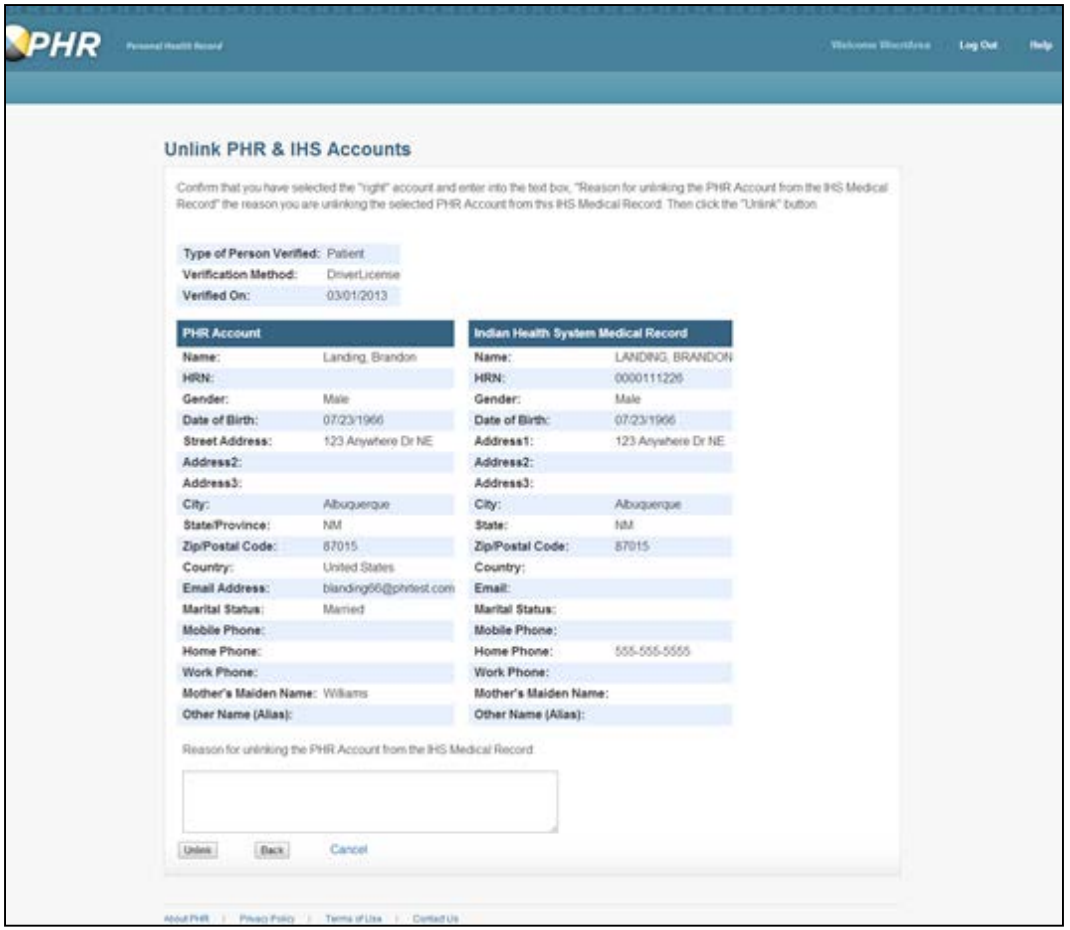
Patient PHR Account Information

- **Unlink Account**.
- **Reset Password**.



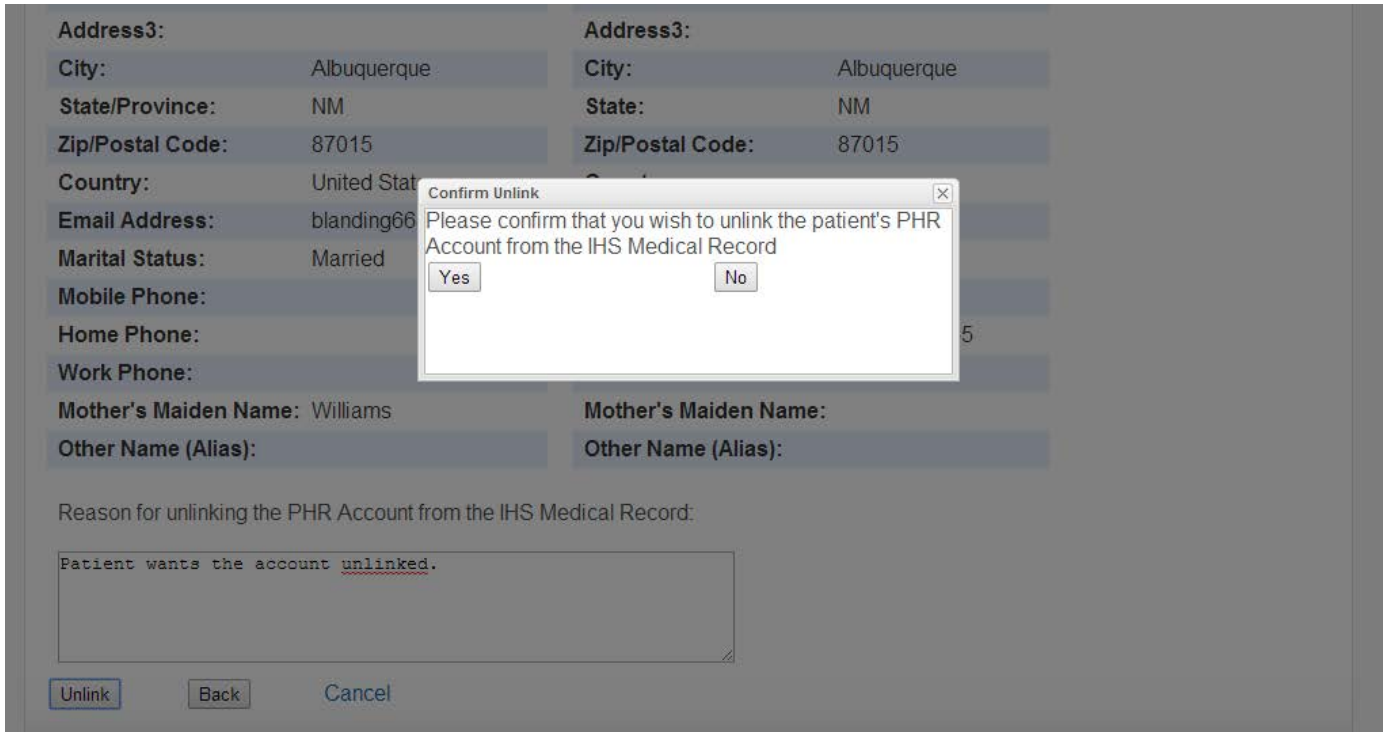
Unlink Patient PHR Account

- Enter reason for unlinking account.

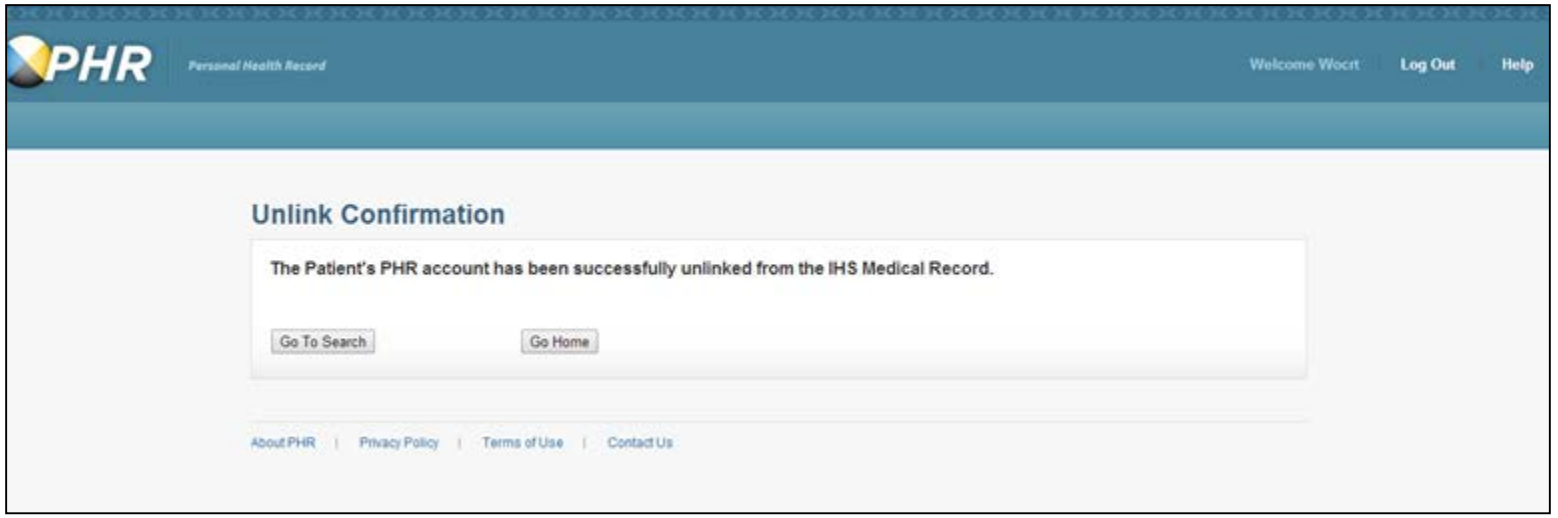


Unlink Account Confirmation

- **Yes** to continue.
- **No** to return to unlink page.

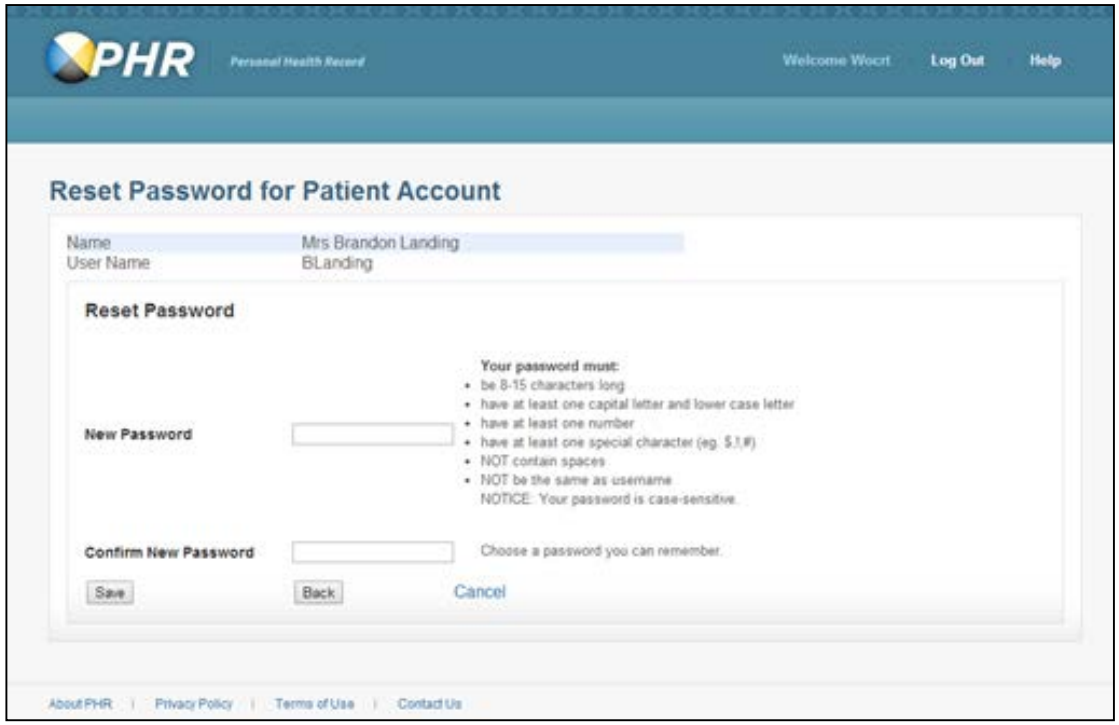


Unlink Confirmation



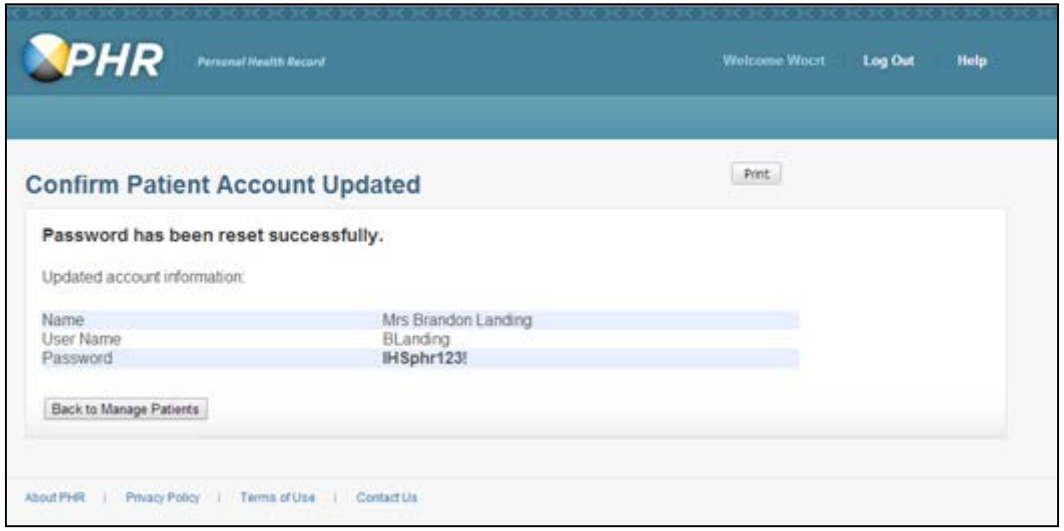
Patient Password Reset

- Items in bold are required.
- Must meet password complexity requirements.



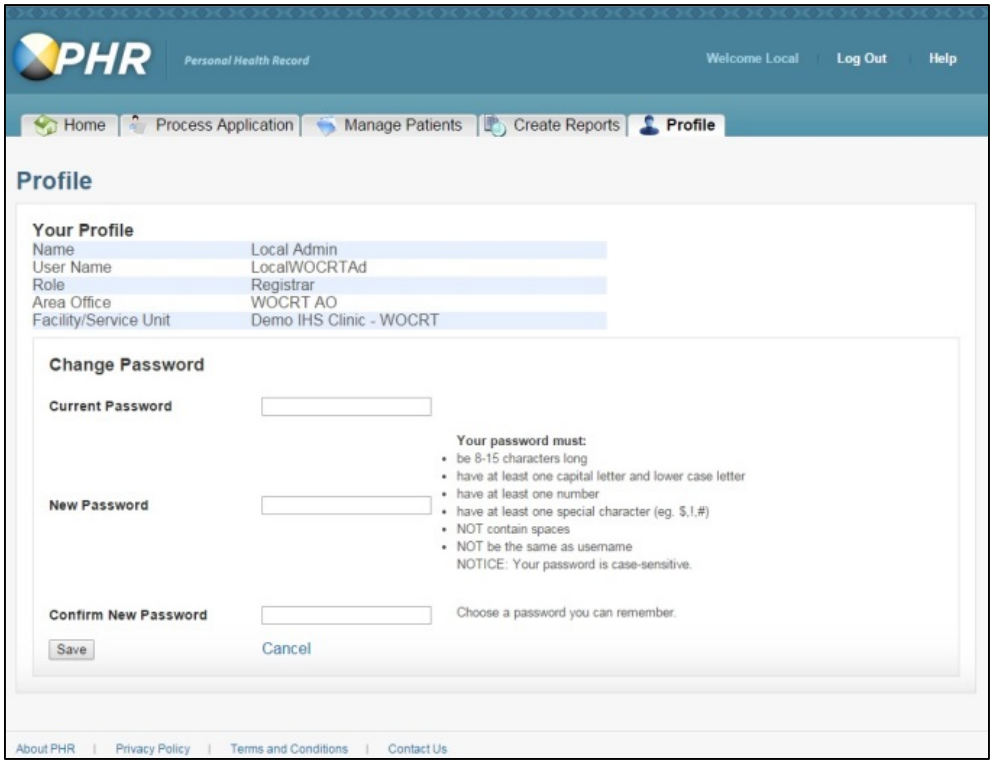
Confirm Patient Password Reset

- Ability to print (use caution).
- Best method – personally deliver.



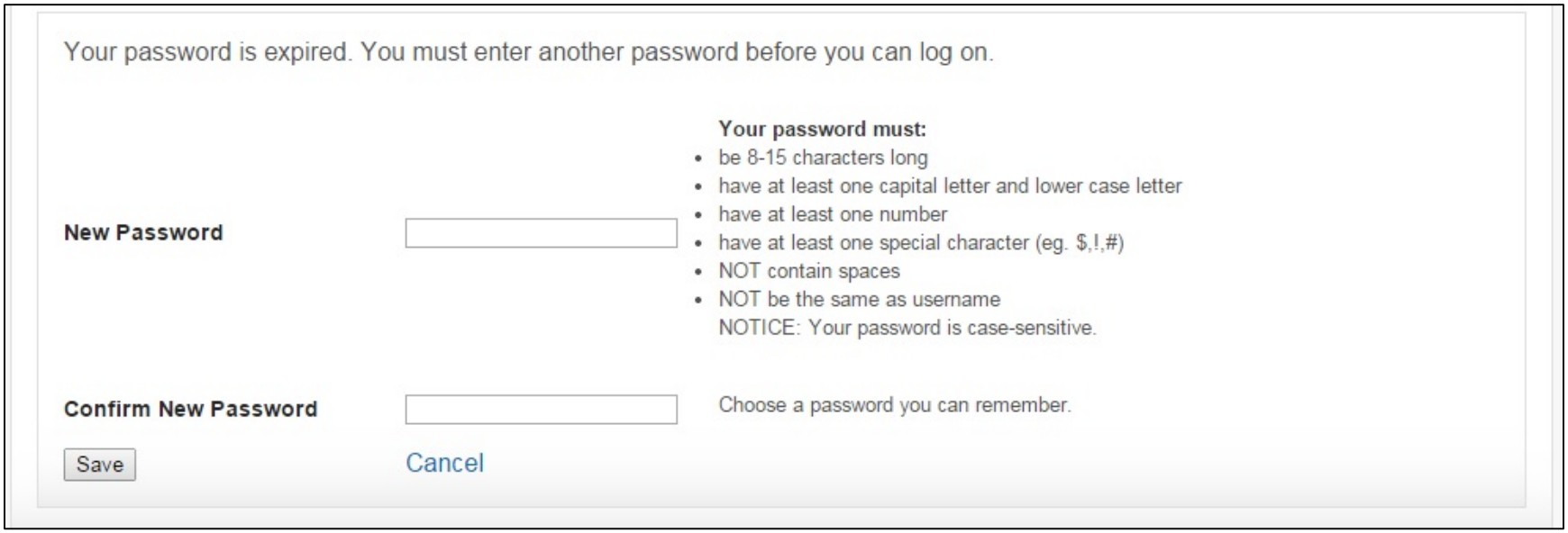
Change Your Admin Password

- Create **Profile** tab.
- Save and log on.



Expired Passwords

- Prompted to change after logon.
- Forgot password:
  - Requires reset by up-level PHR administrator.



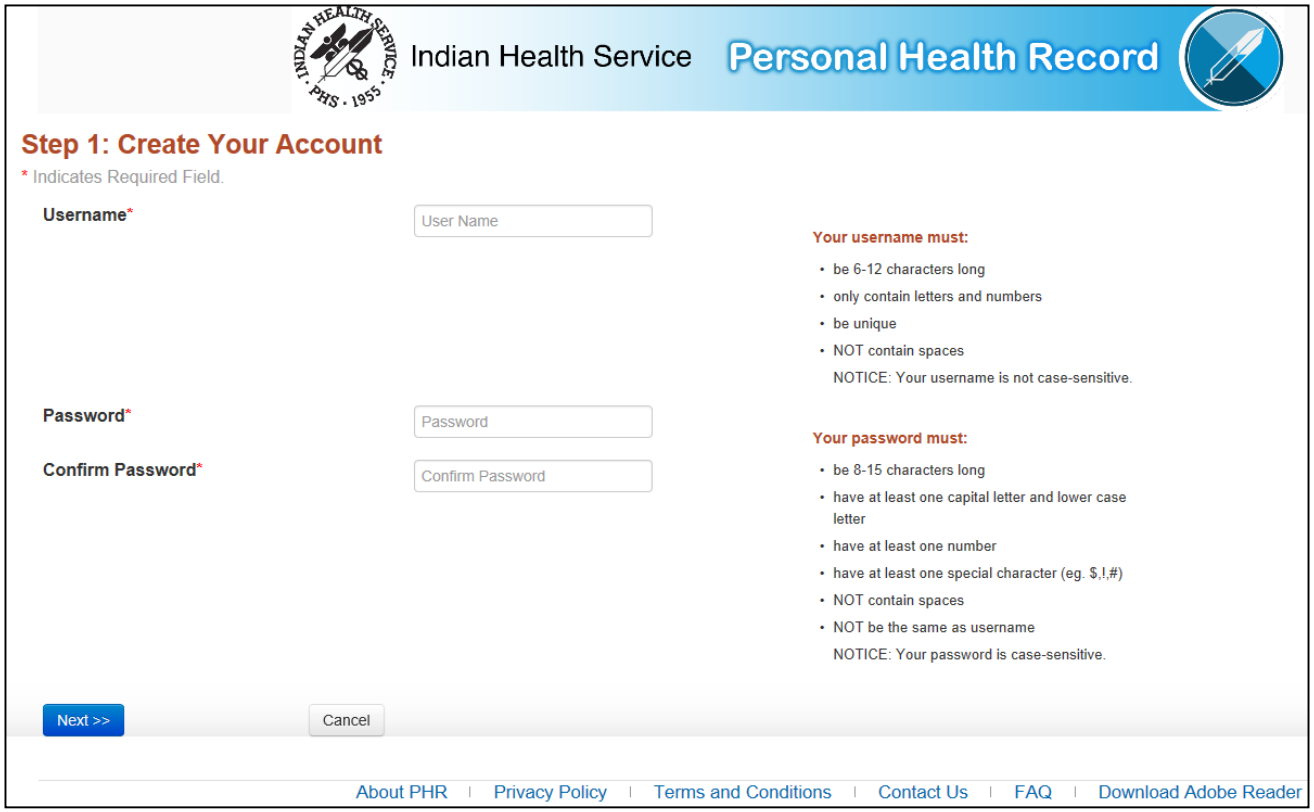
PHR Patient Web Portal Overview

PHR Patient Web Portal

- Location: https://phr.ihs.gov/.
- Register to use PHR or log on.

Register to Use PHR: Step 1

- Create account.

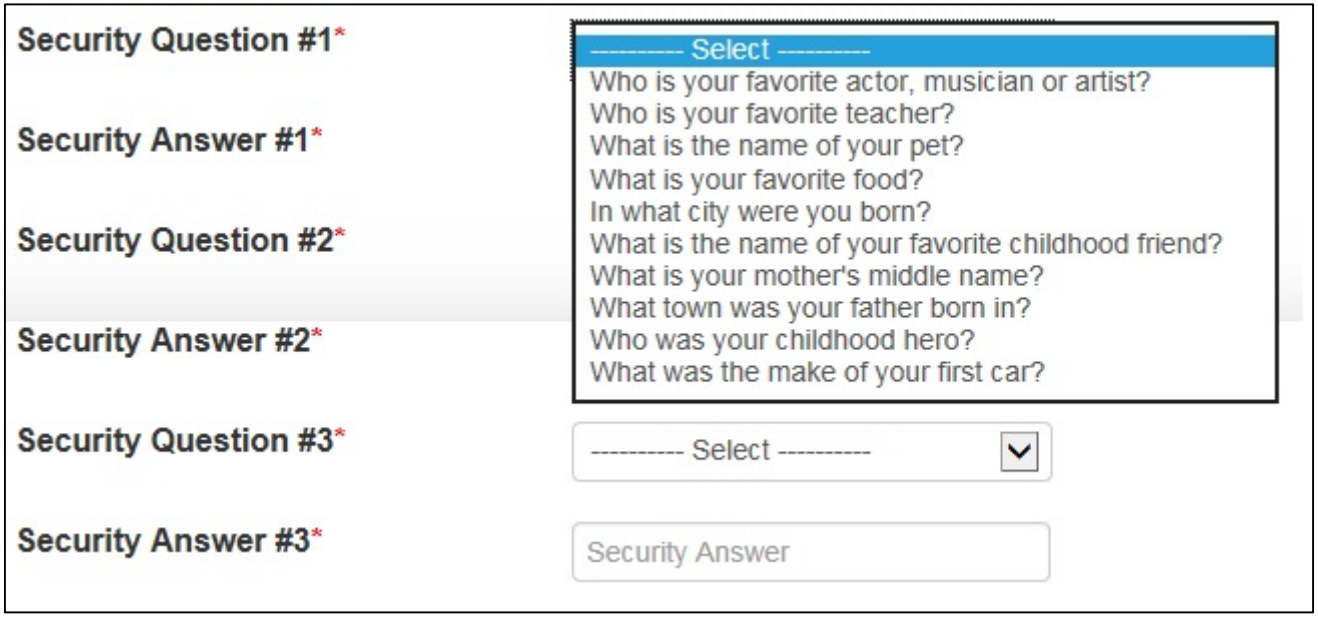


Register to Use PHR: Step 2

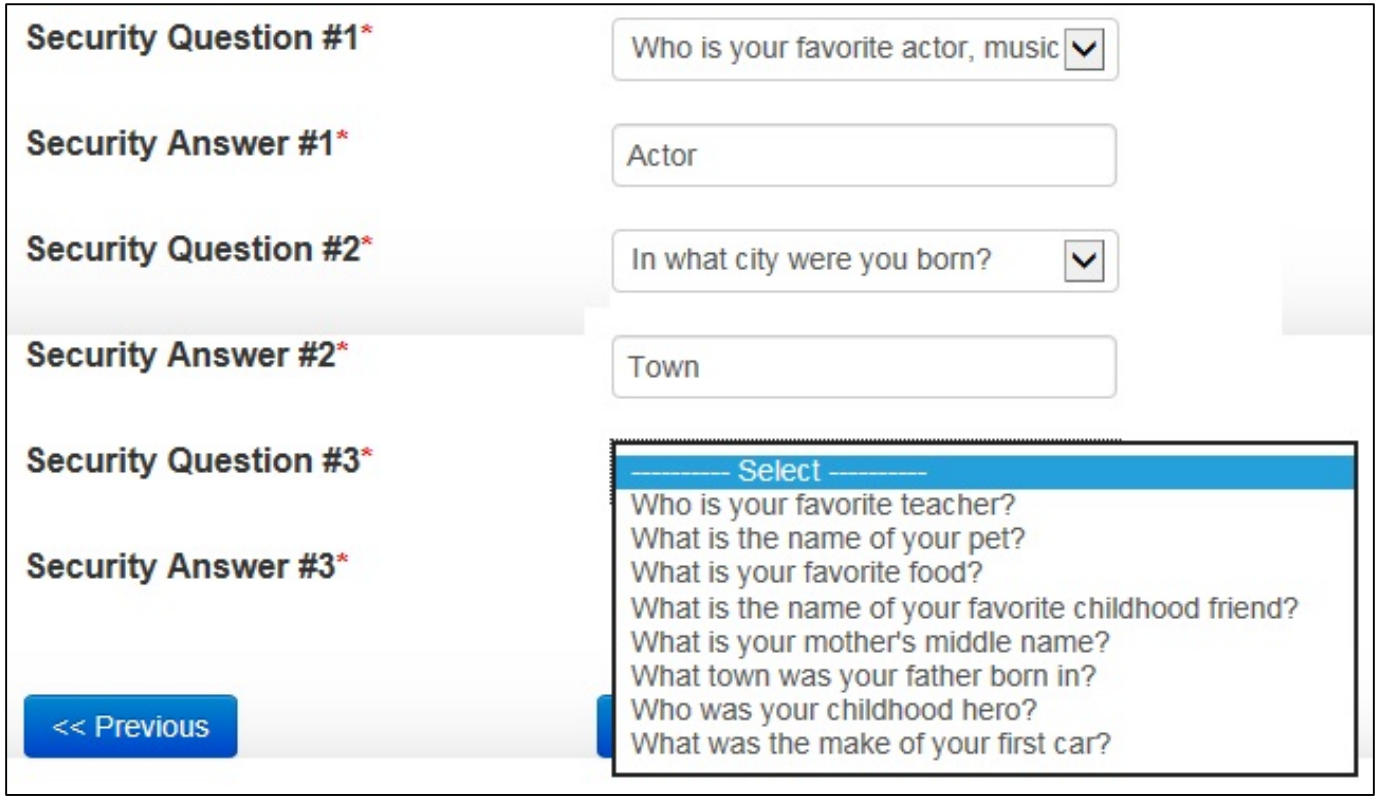
- Security questions and answers.

Security Questions

- Cannot be reused.



Security Questions and Answers



Register to Use PHR: Step 3

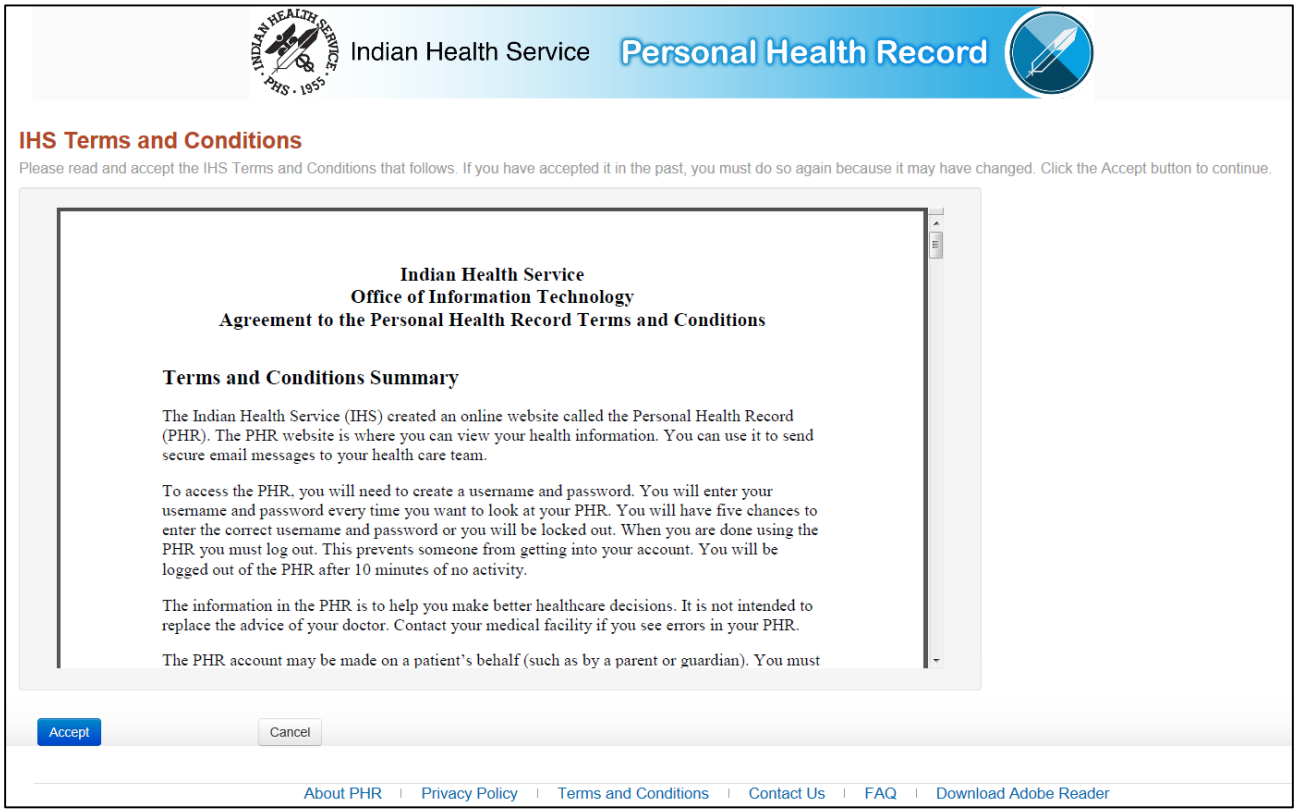
- Enter demographic information.

IHS Web Privacy Policy

- Read and accept.

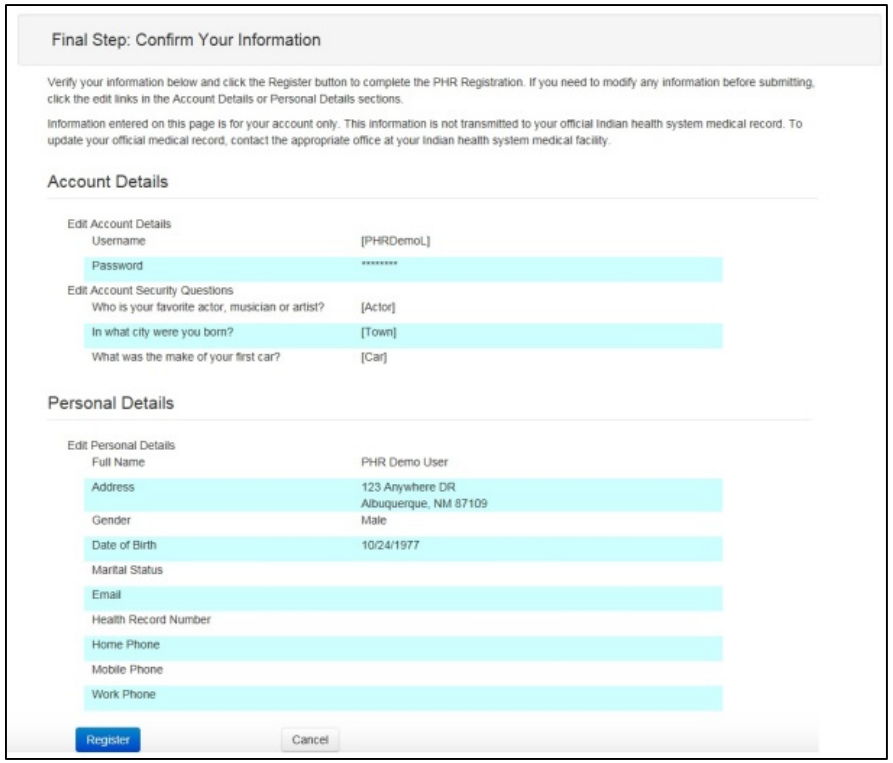
PHR Terms and Conditions

- Read and accept.



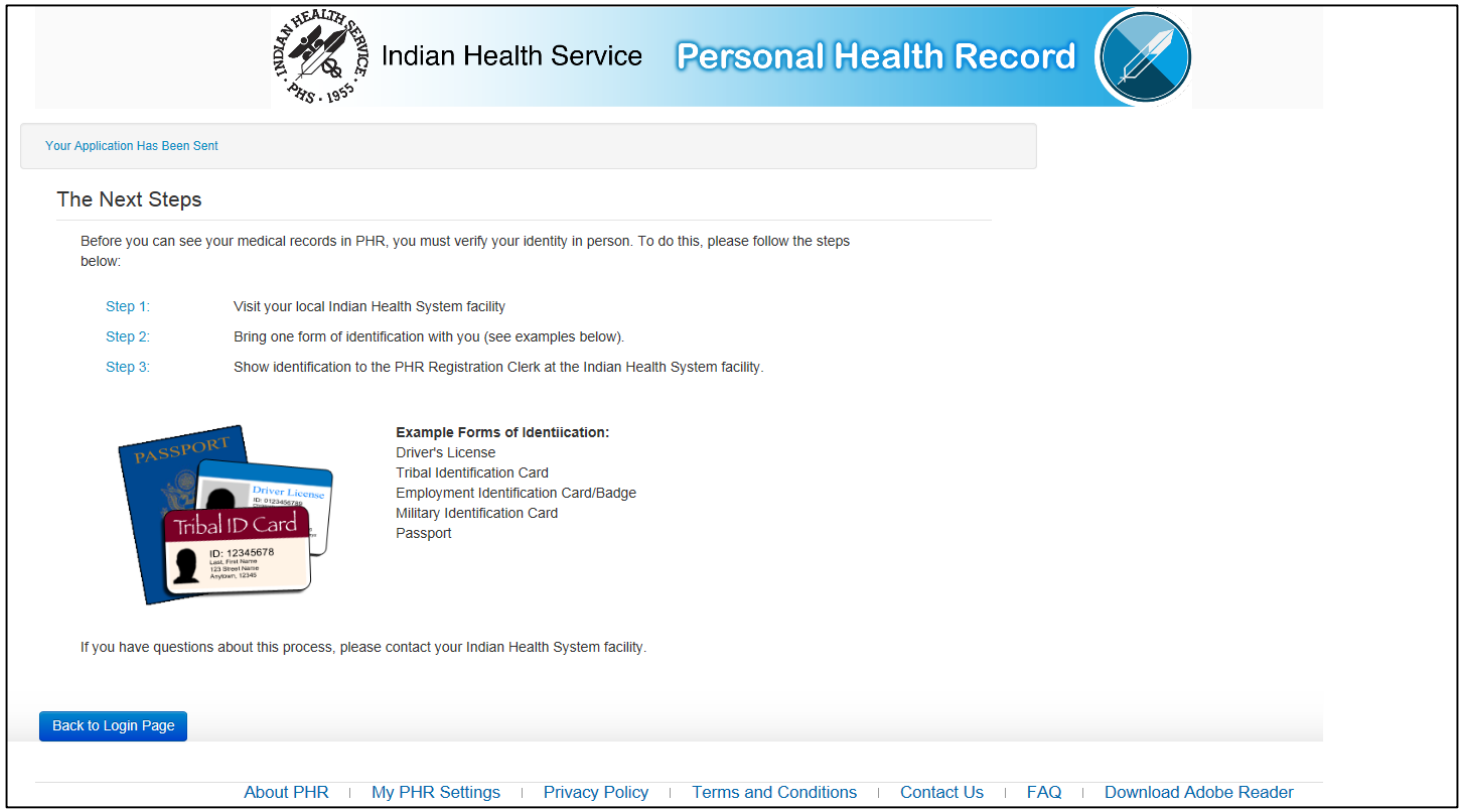
Register to Use PHR Confirmation

- Verify registration information and click **Register**.



Complete PHR Registration

- Registration complete – **The Next Steps**.



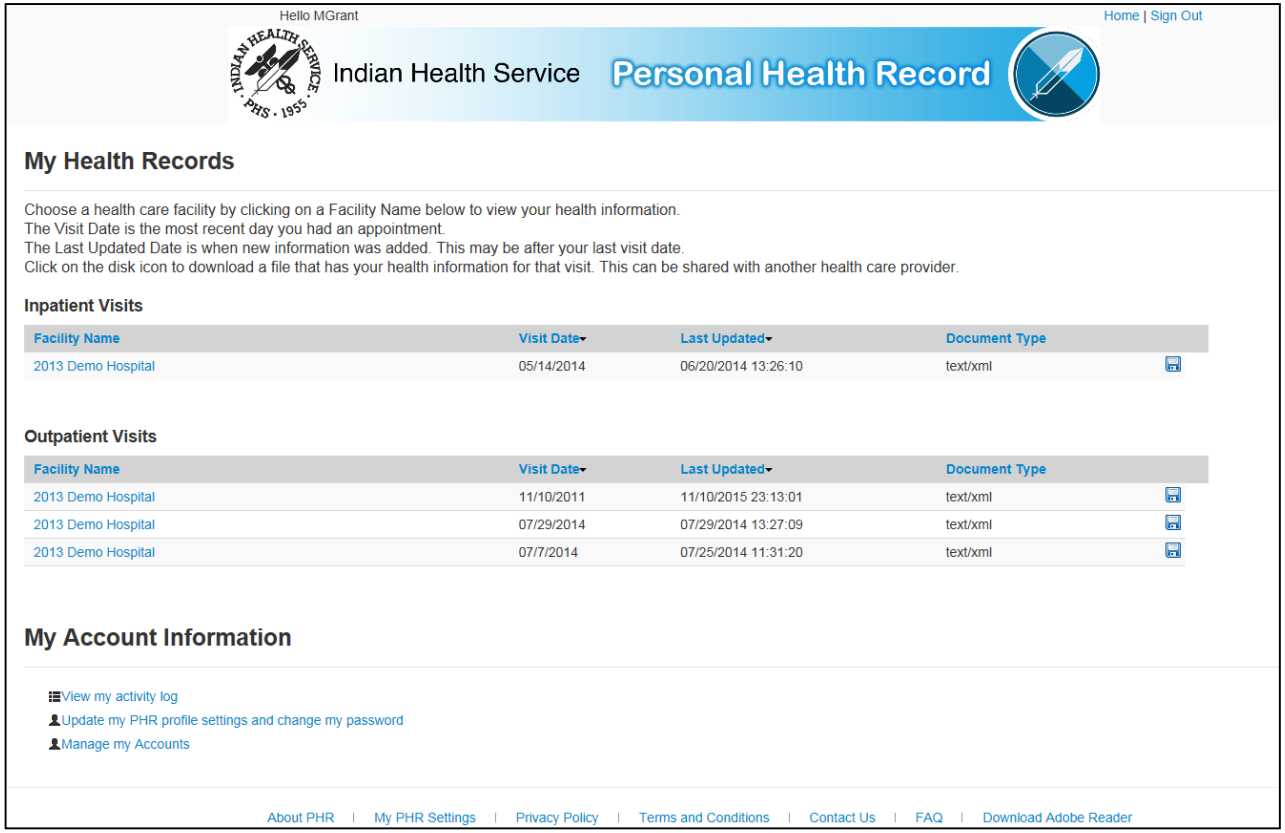
Patient PHR Landing Page

The Next Steps.

- **My Health Records**:
  - Default landing page.
  - Inpatient visits.
  - Outpatient visits.
  - Account information.
- **My Accounts** – if others granted access:
  - Access own account.
  - Other PHR accounts.
  - Manage account access.

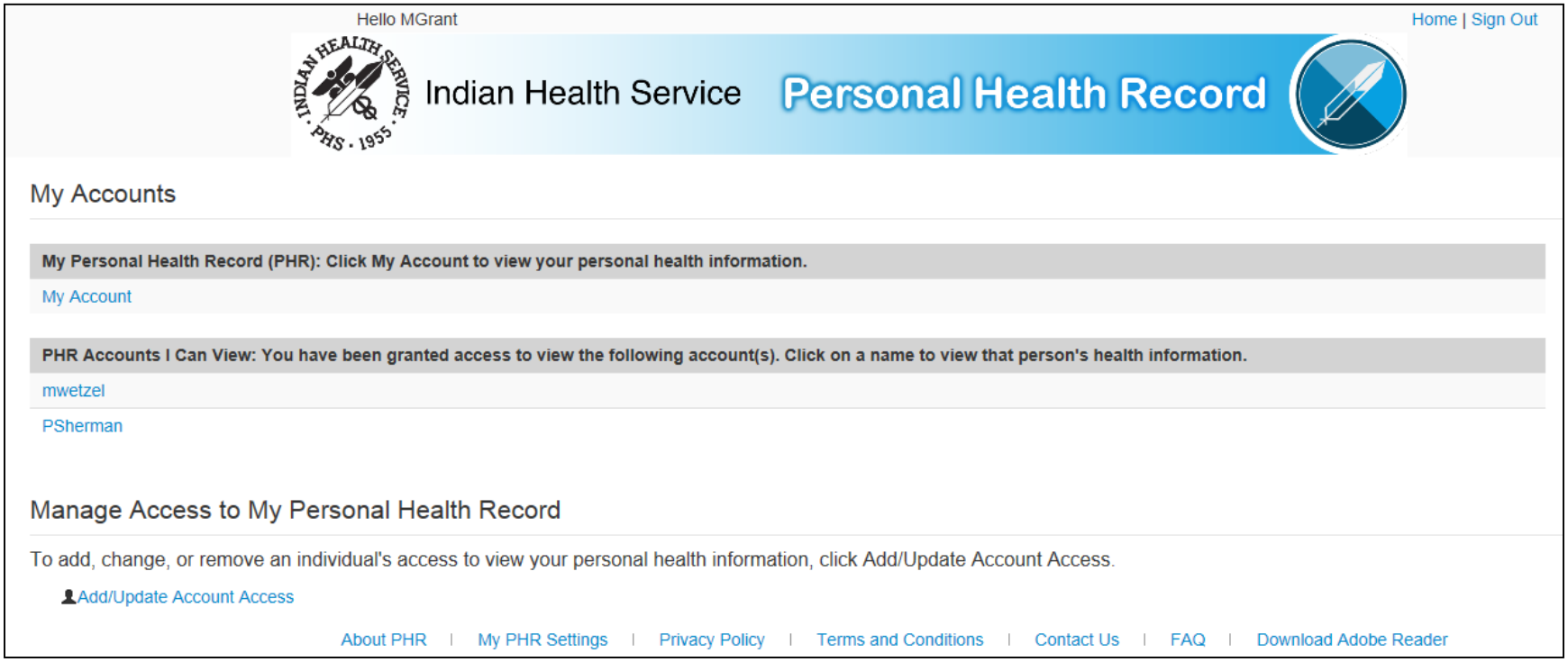
My Health Records Landing Page

- Default (Test Account).



My Accounts Landing Page

- If others granted access (test accounts).



Grant Access to Personal Representatives

Add and Manage Access

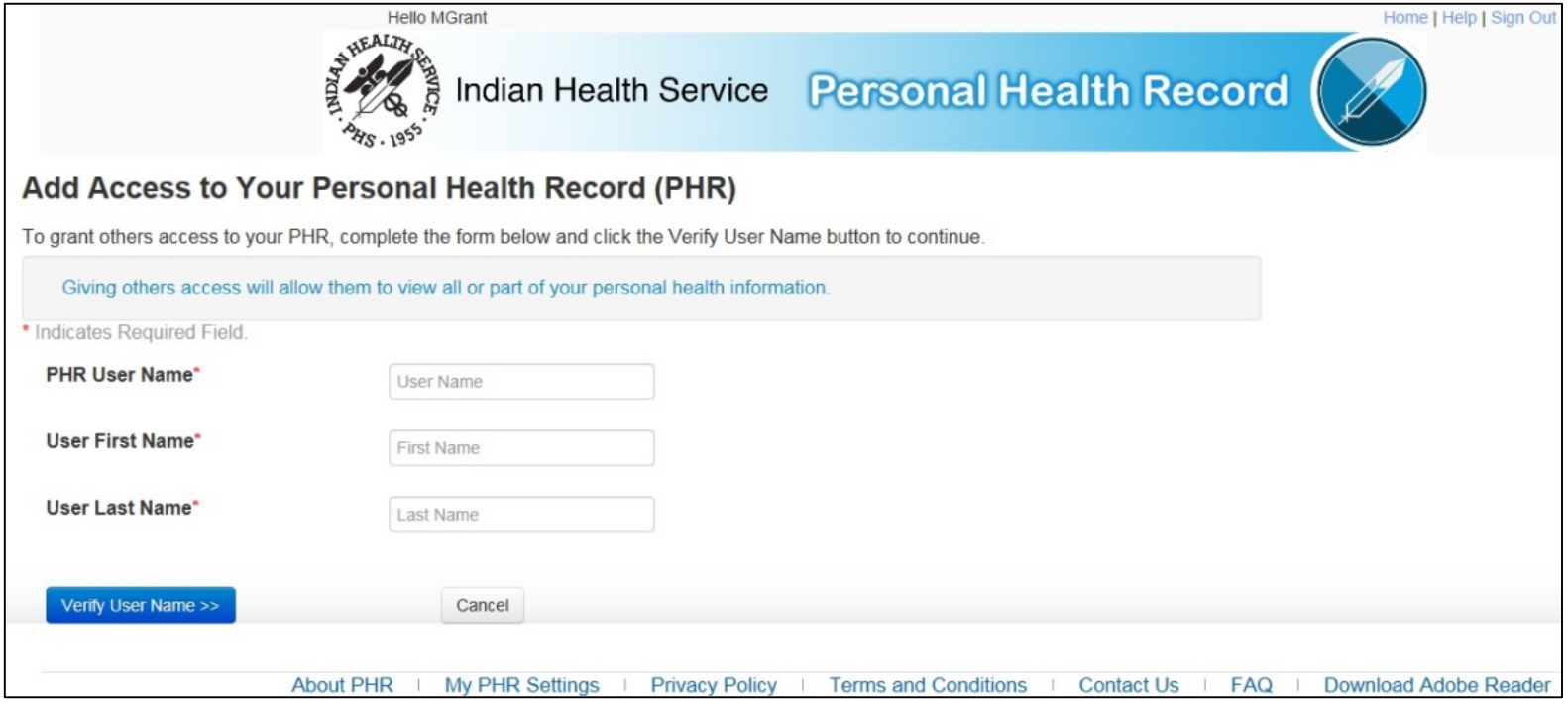
- **Manage My Accounts** link:
  - Bottom of the **My Health Records** page.
- **Add/Update Account Access** link:
  - Bottom of **My Accounts** Page.

Grant Other Users Access

- **Update Access** or **Delete Access**.
- Add PHR access.

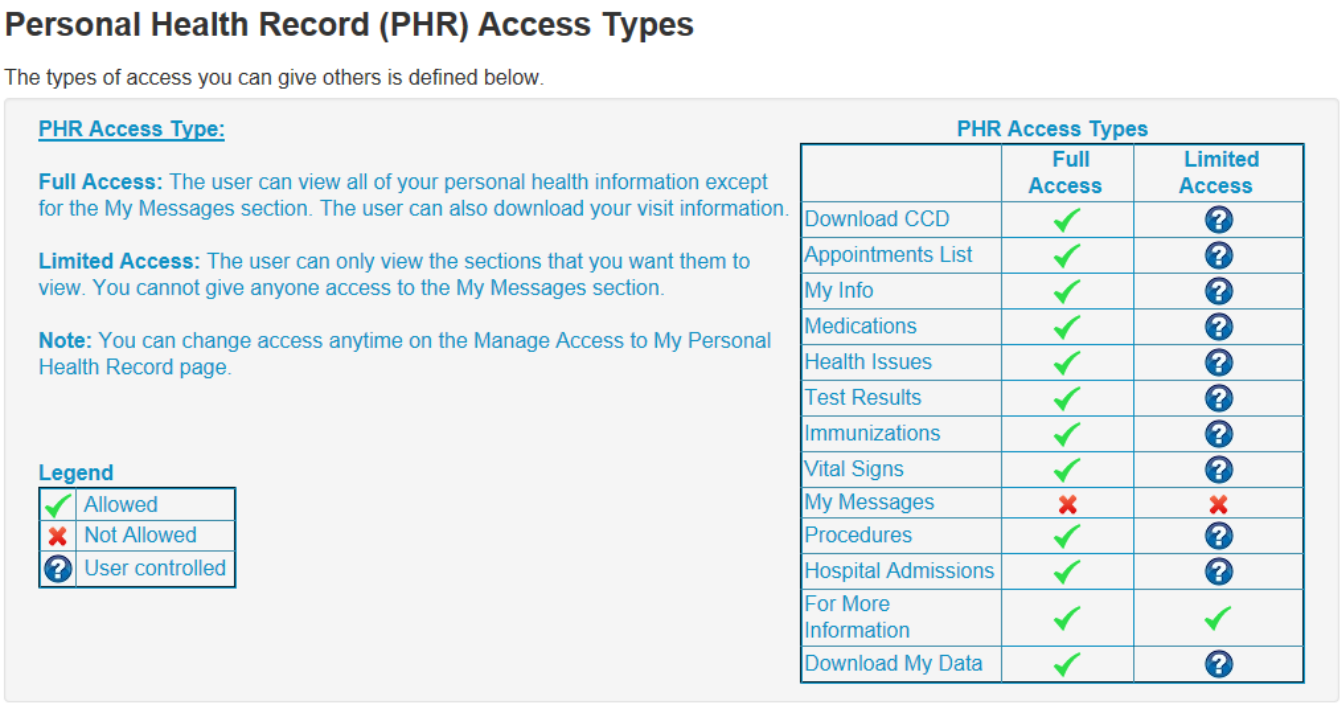
Add Access

- Enter PHR account information of grantee.



Access Type Descriptions

- Full access.
- Limited access.



Personal Health Record (PHR) Access Types

The types of access you can give others is defined below.

PHR Access Type:

Full Access: The user can view all of your personal health information except for the My Messages section. The user can also download your visit information.

Limited Access: The user can only view the sections that you want them to view. You cannot give anyone access to the My Messages section.

Note: You can change access anytime on the Manage Access to My Personal Health Record page.

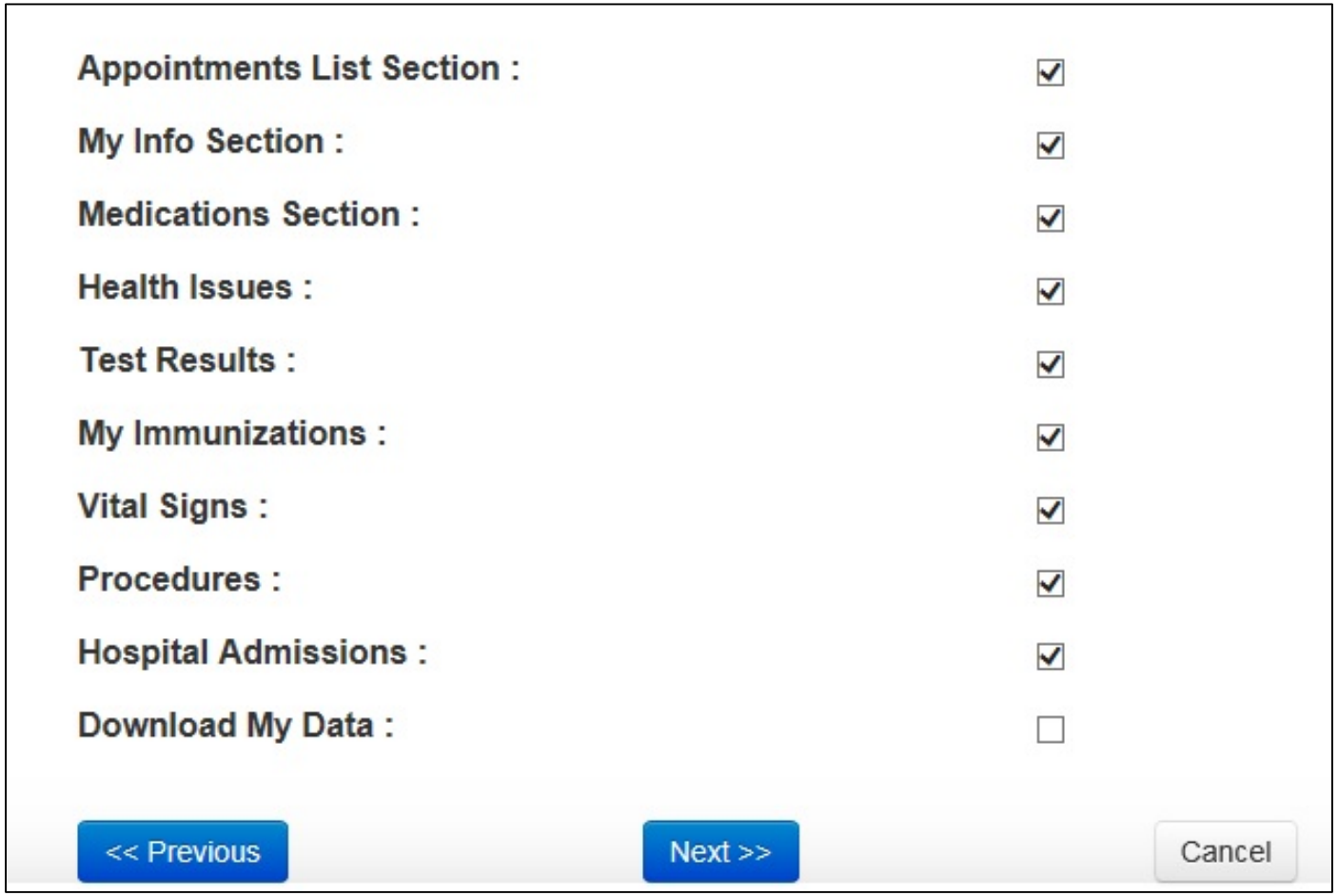
Legend

✓	Allowed
✗	Not Allowed
?	User controlled

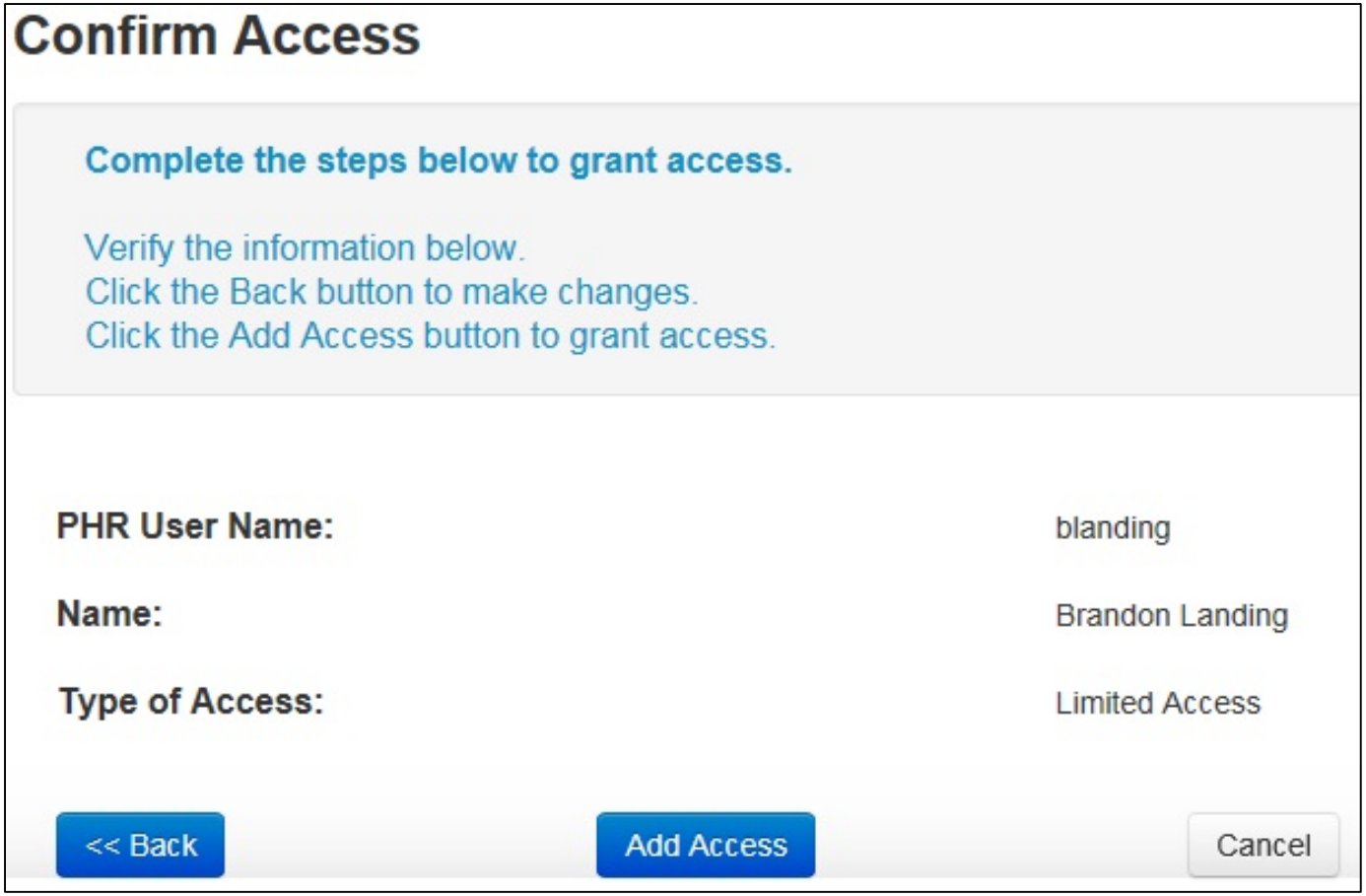
PHR Access Types

	Full Access	Limited Access
Download CCD	✓	?
Appointments List	✓	?
My Info	✓	?
Medications	✓	?
Health Issues	✓	?
Test Results	✓	?
Immunizations	✓	?
Vital Signs	✓	?
My Messages	✗	✗
Procedures	✓	?
Hospital Admissions	✓	?
For More Information	✓	✓
Download My Data	✓	?

Limited PHR Access Sections



Confirm Access



Manage Access

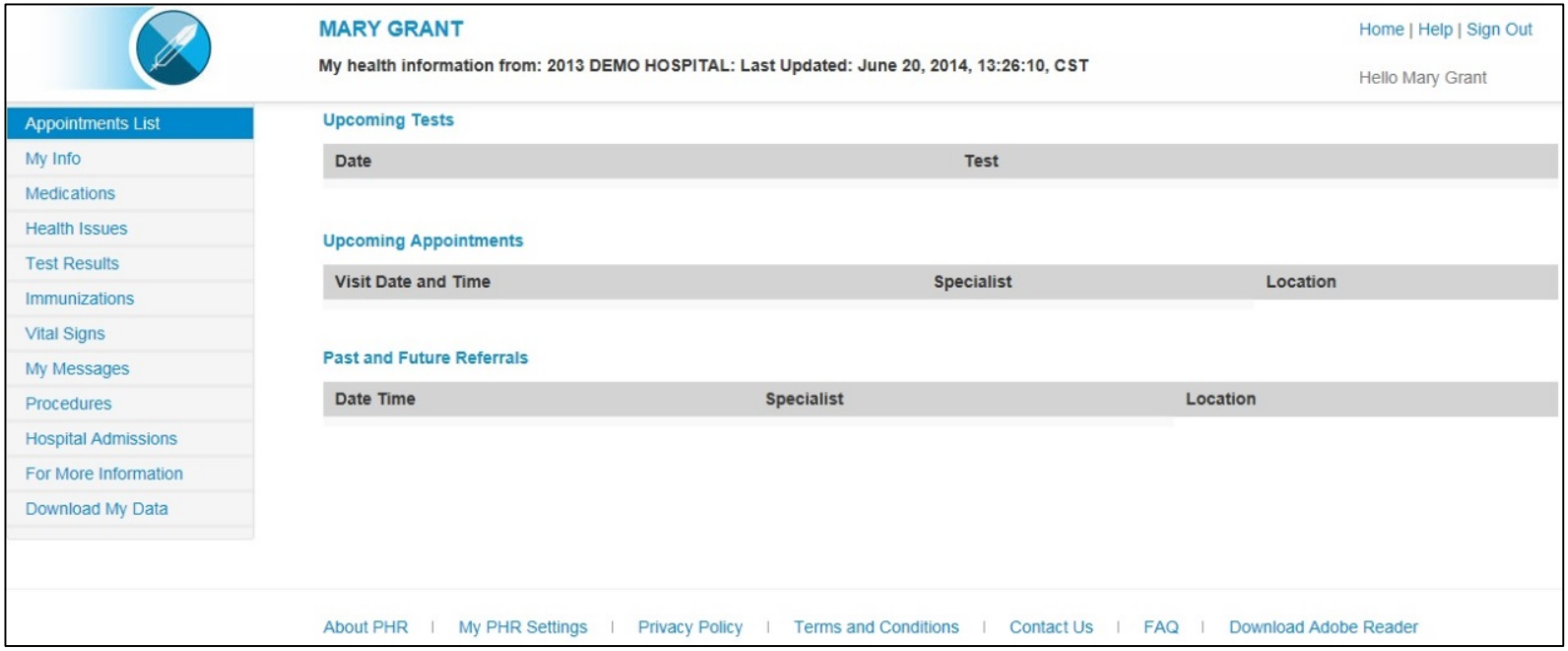
Granting PHR Access

- Registered users.
- Verified users.
- Access can be updated at anytime.
- No limitations to the number of granted users.
- Cannot access **My Messages** for other users.
- **Download My Data is** disabled by default.

Visit Information Details

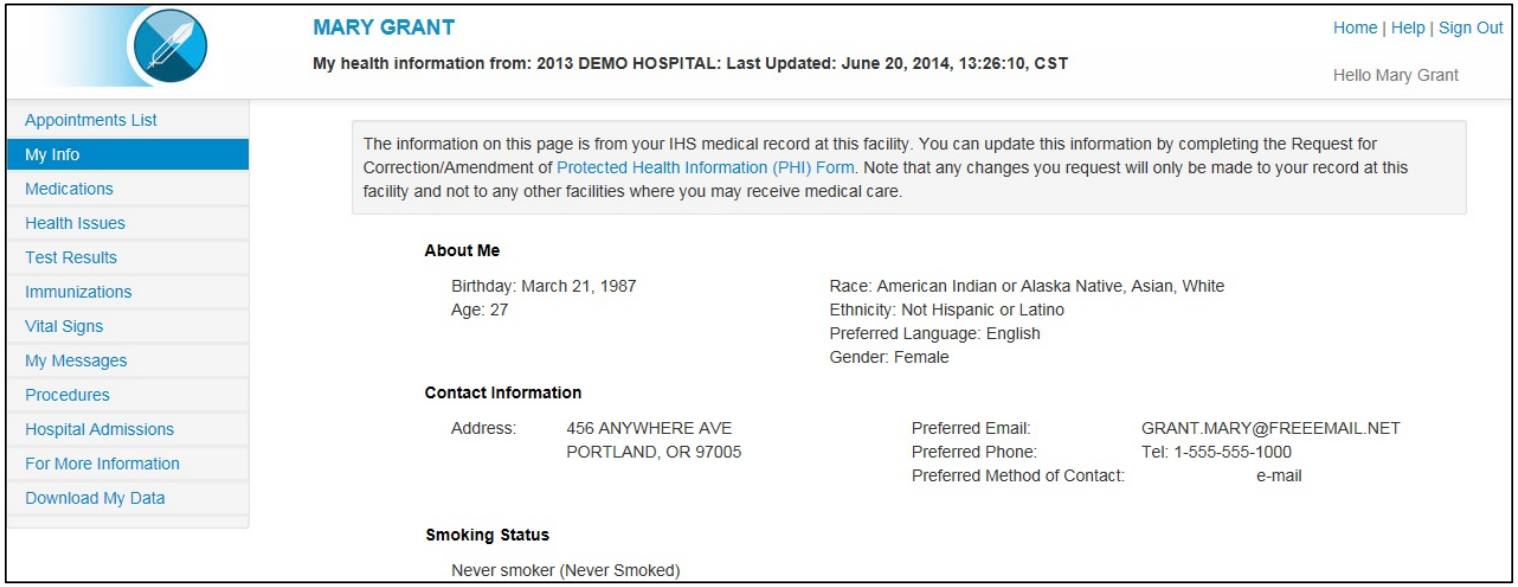
Appointment List

- Select **Visit** from **My Health Records** page.
- **Upcoming Tests**, **Upcoming Appointments**, **Past and Future Referrals** (test account).



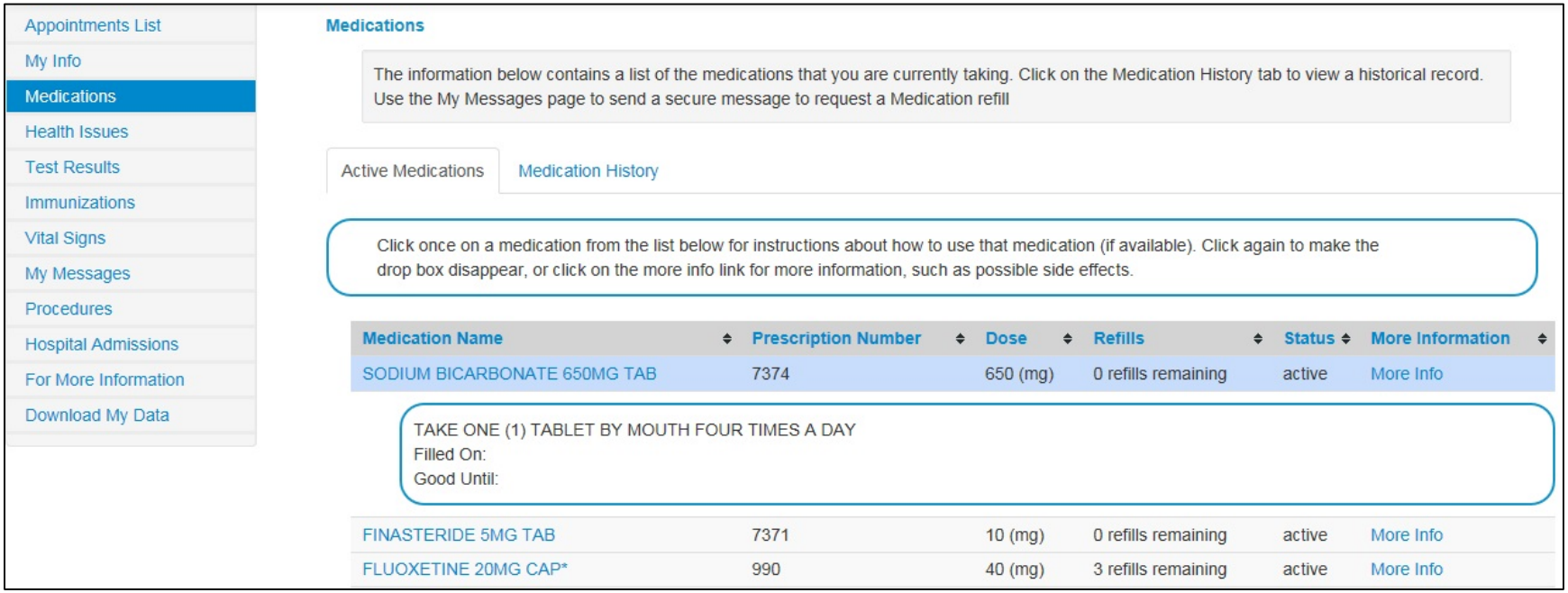
My Information

- Demographics (test account):
  - **About Me, Contact Information, Smoking Status, Allergies, Activities of Daily Living, My Care Team, My Visit Facility Address, My Visit Date.**



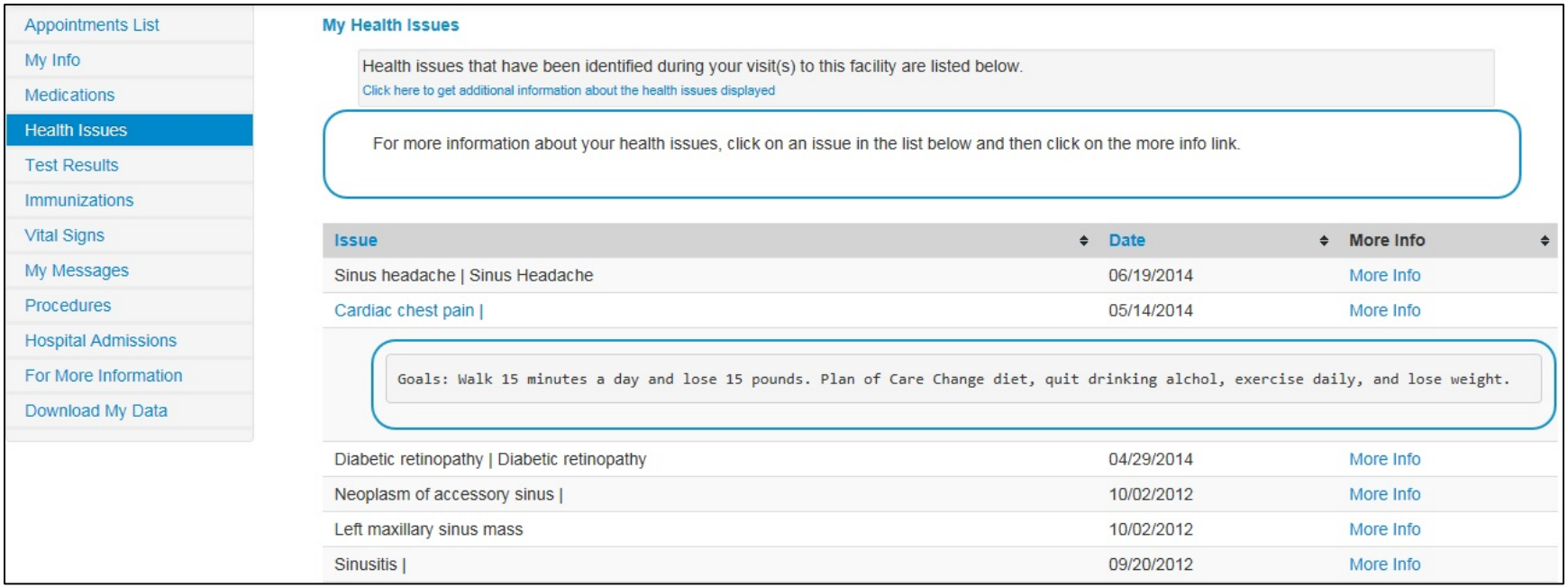
Medications

- **Active Medications** tab (test account).
- **Medication History** tab (test account).



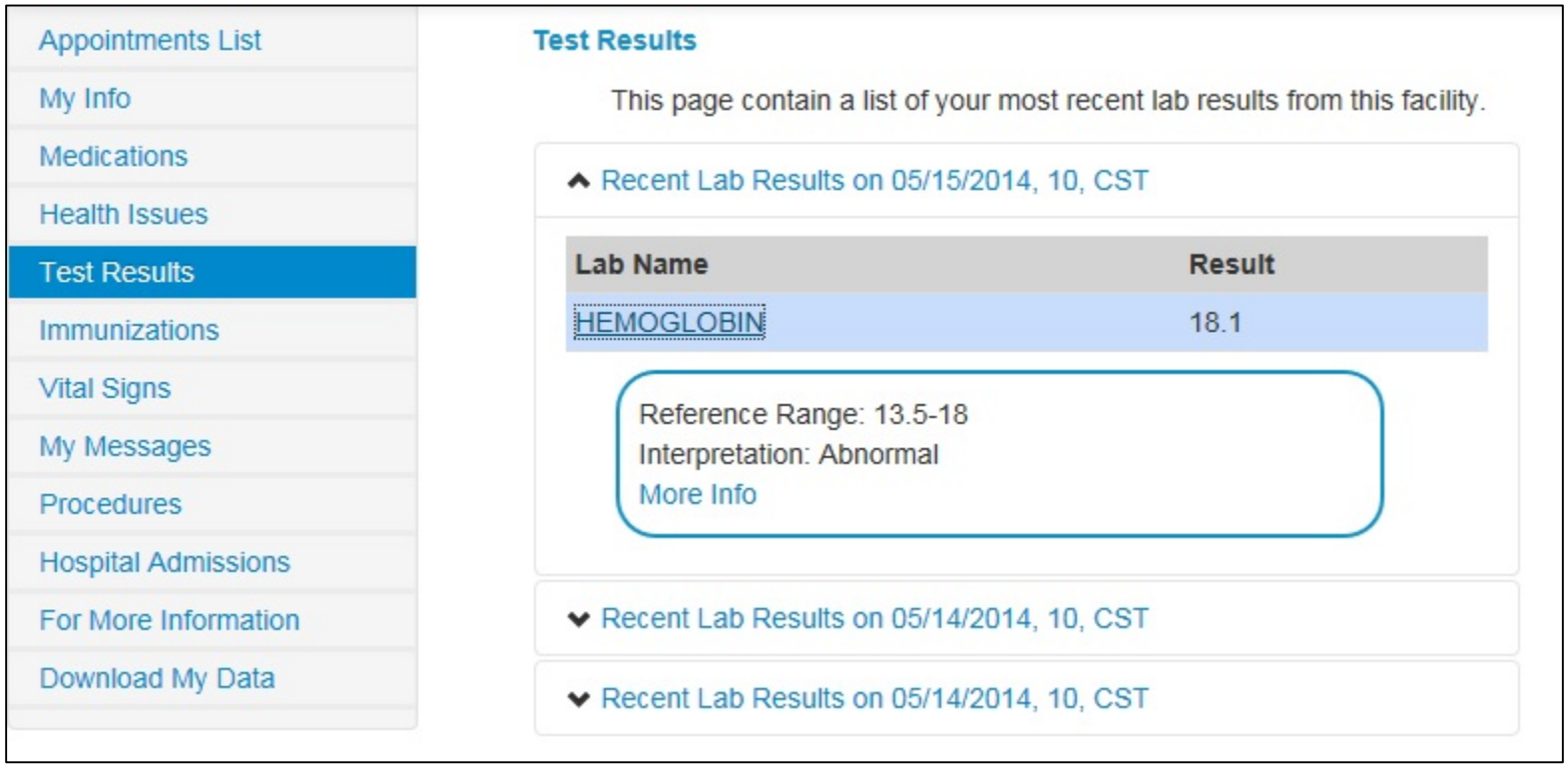
Health Issues

- Problem List (test account).
- Visit Diagnosis/Problem List (test account).



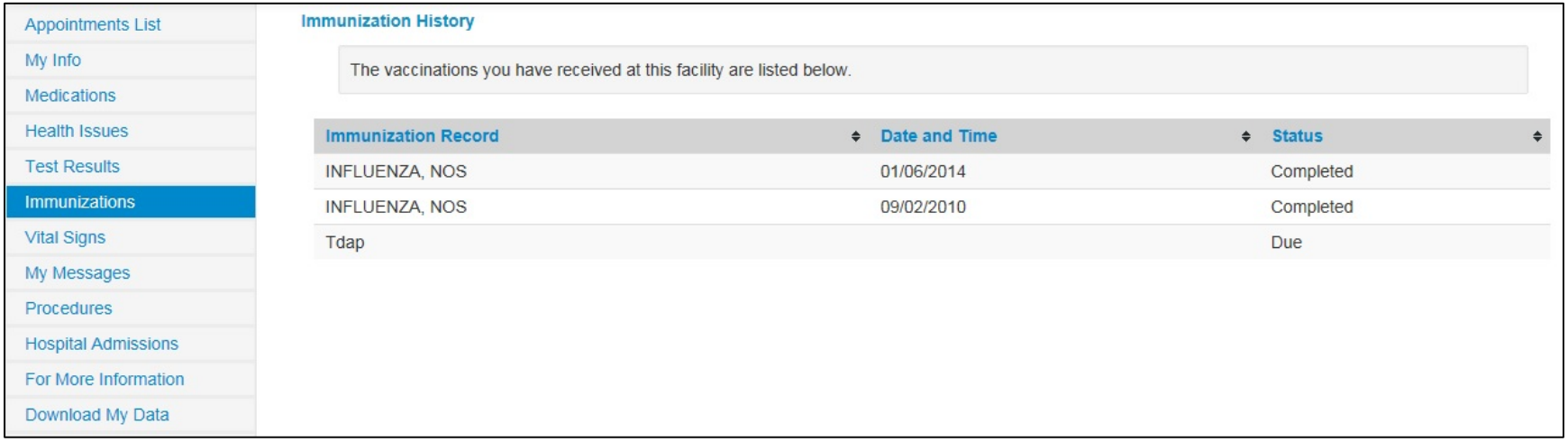
Test Results

- Most recent resulted lab results (test account).



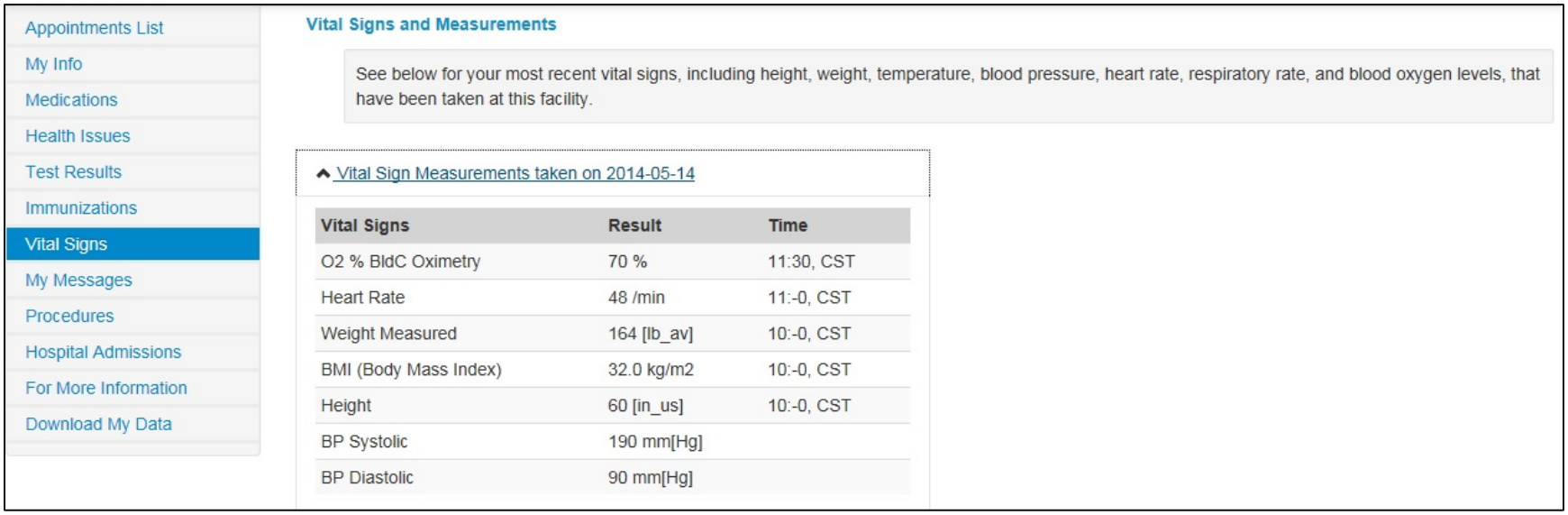
Immunizations

- List of Vaccinations (test account):
  - Received and Historical.
  - Service Unit/Facility Record.



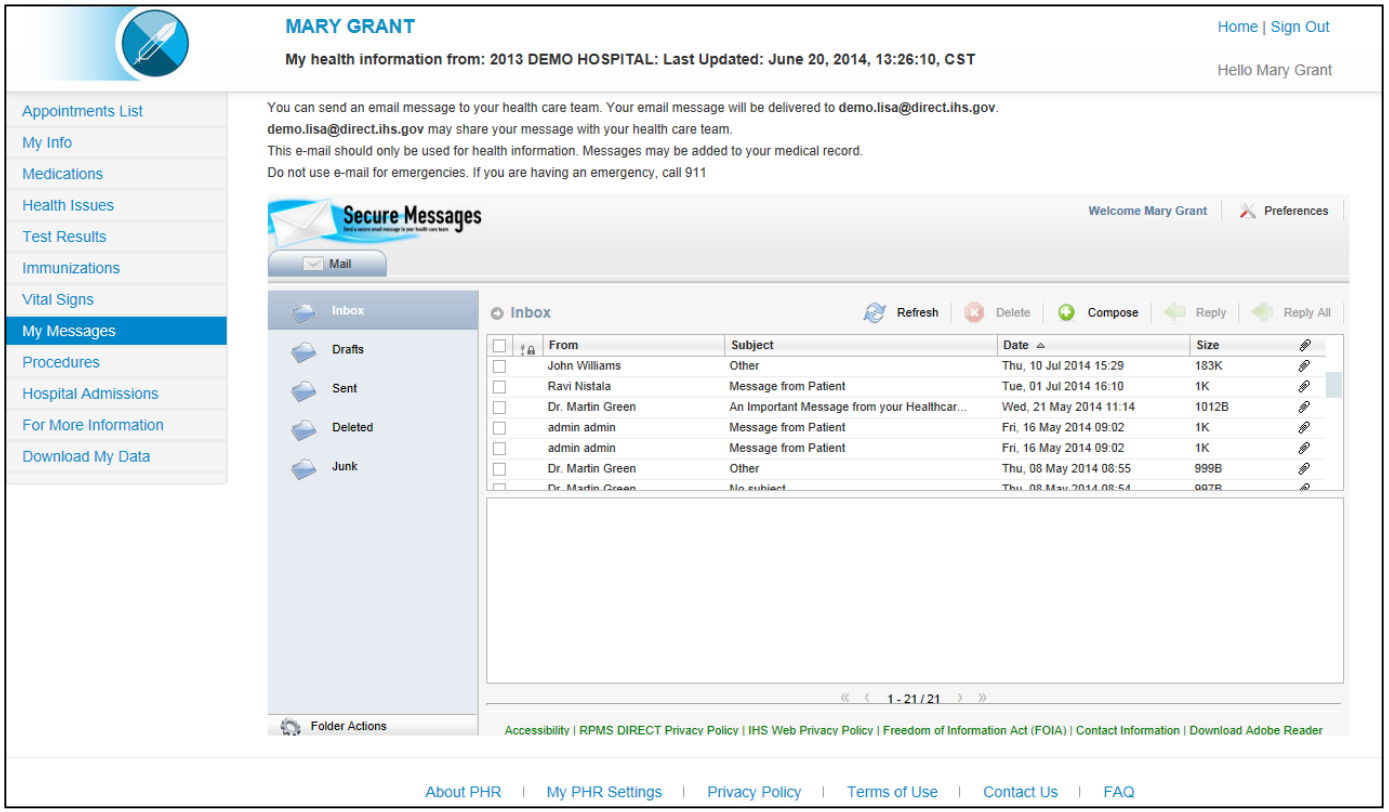
Vital Signs

- **Vital Signs and Measurements** (test account):
  - Height, weight, temperature, blood pressure, etc.



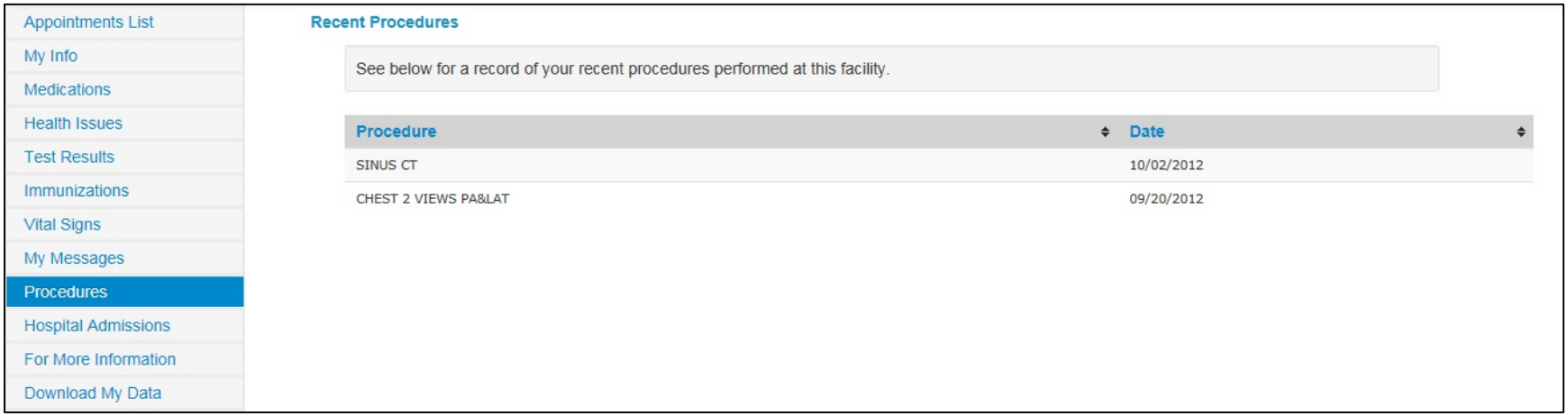
My Messages

- Patient access to RPMS DIRECT (test accounts).



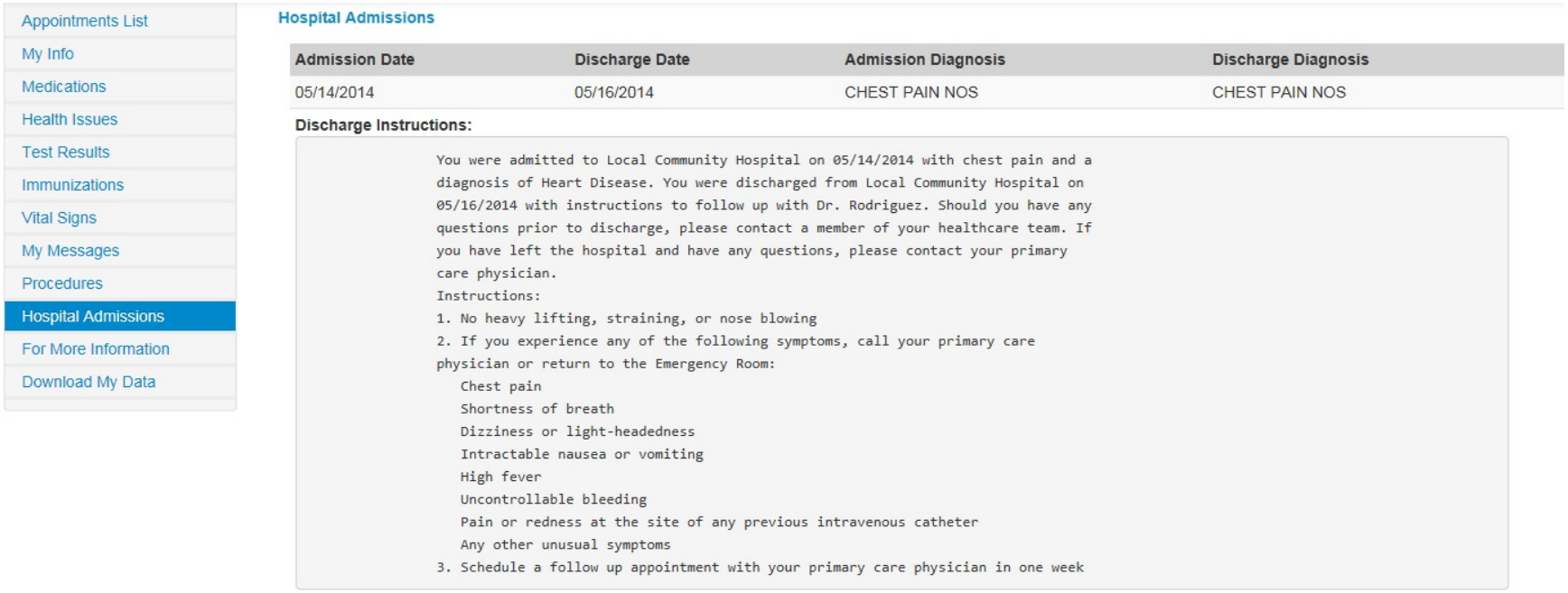
Procedures

- Facility Procedure Record (test account):
  - Received and Historical.



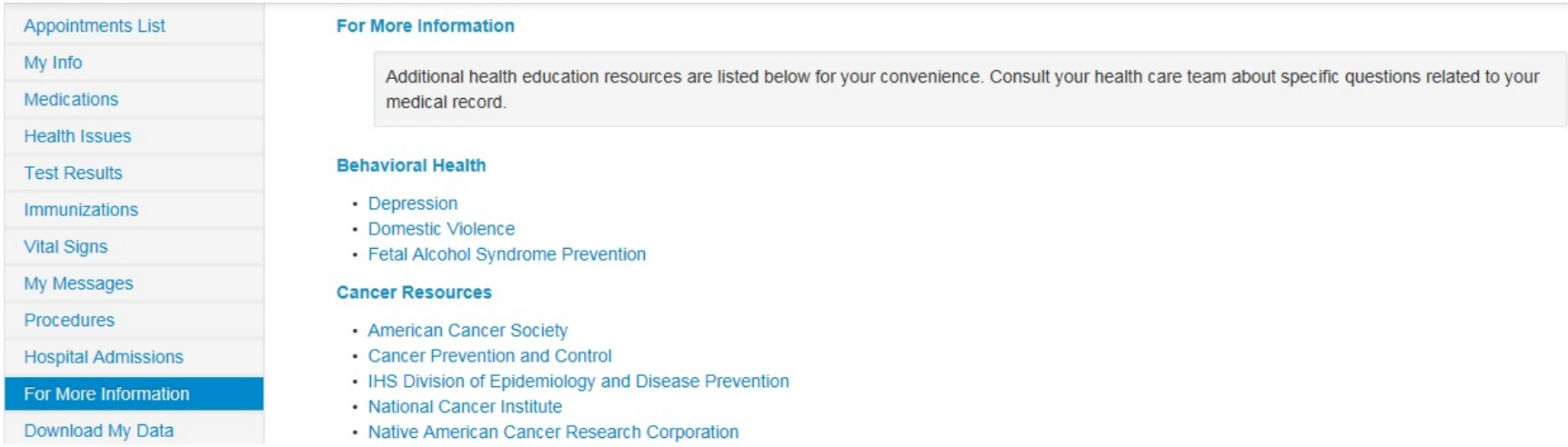
Hospital Admissions

- Inpatient visit only (test account).



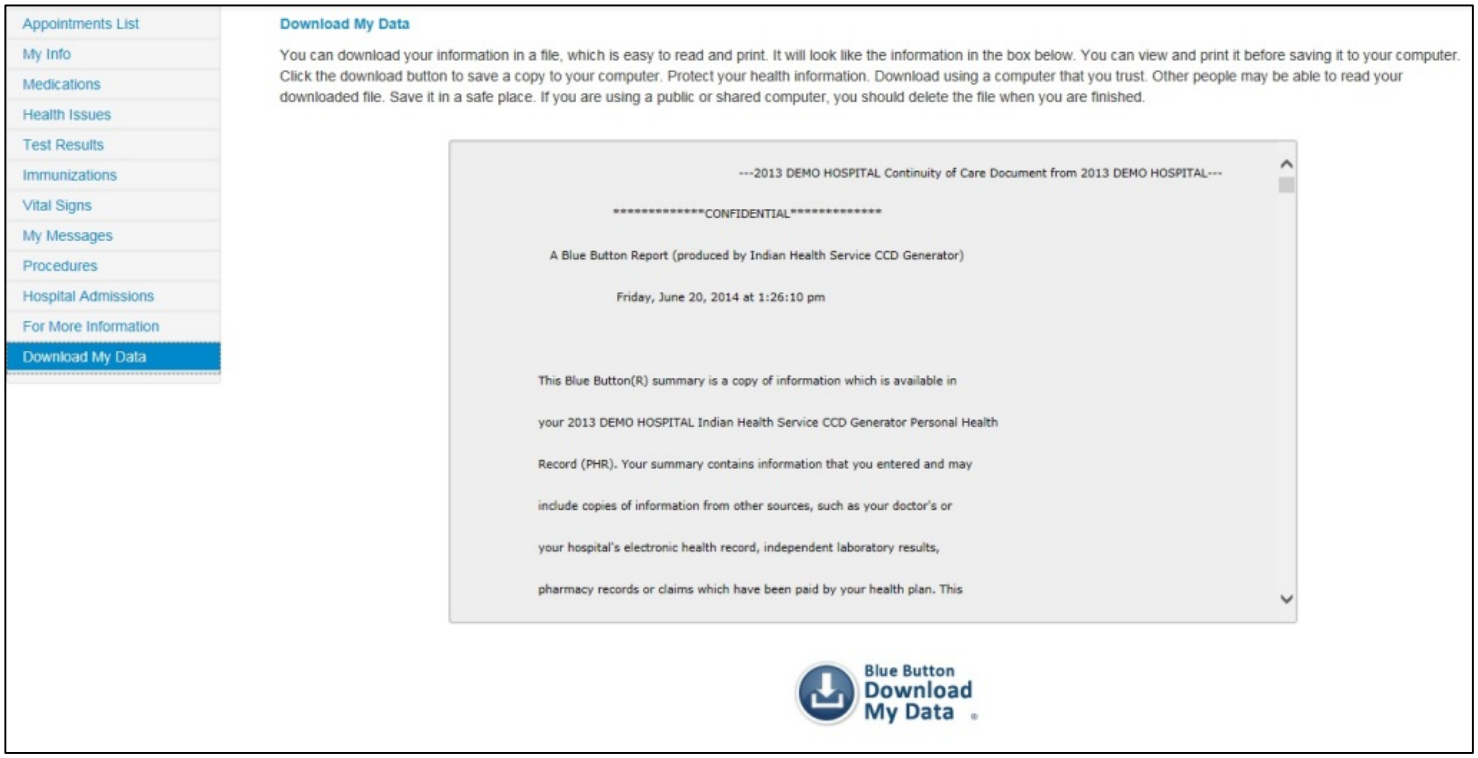
For More Information

- Additional learning resources.
- Consult health care team.



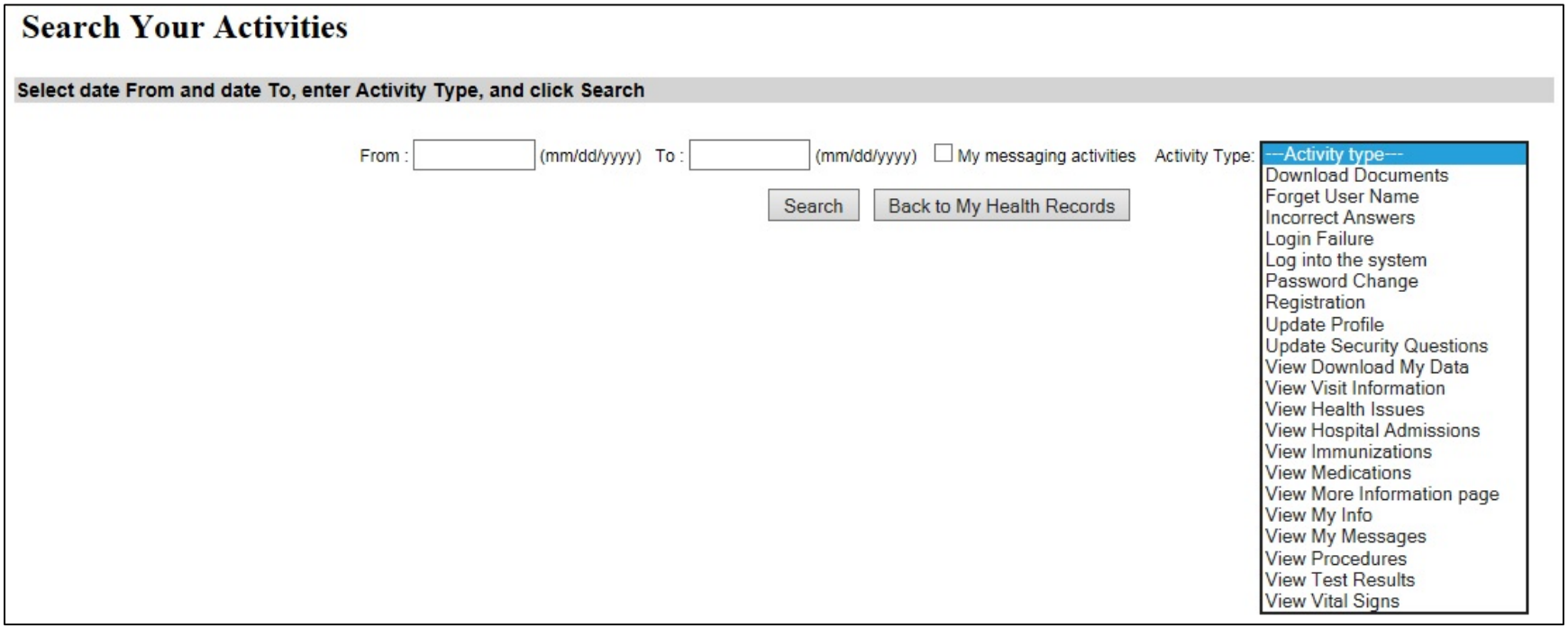
Download My Data

- Human readable text format (test account).



PHR Activity Log

- View **My Activity Log** link (My Health Records page).
- Search PHR activities (test account).

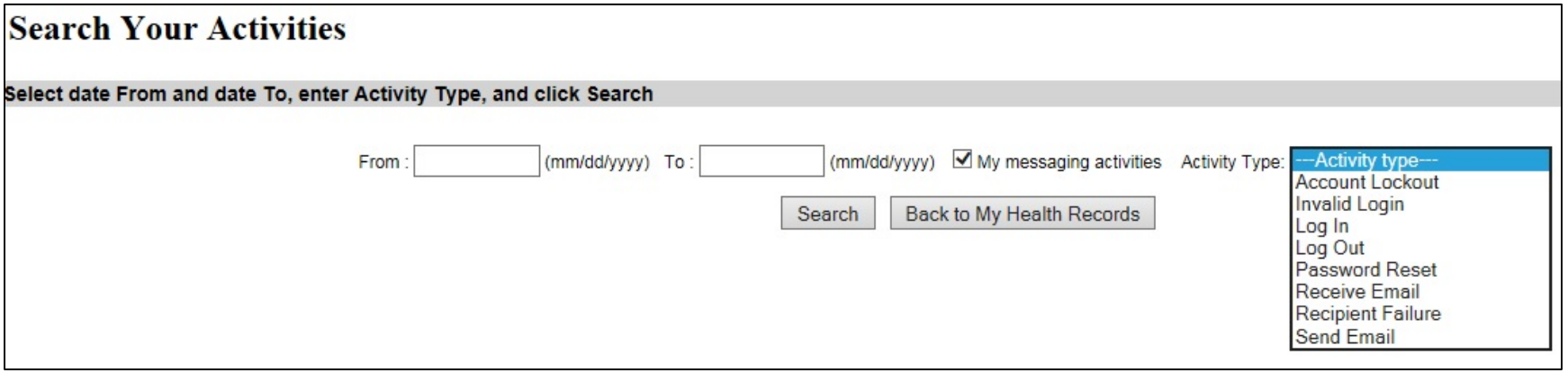


Search Activity Type

- Search results (test account).
- Download report.

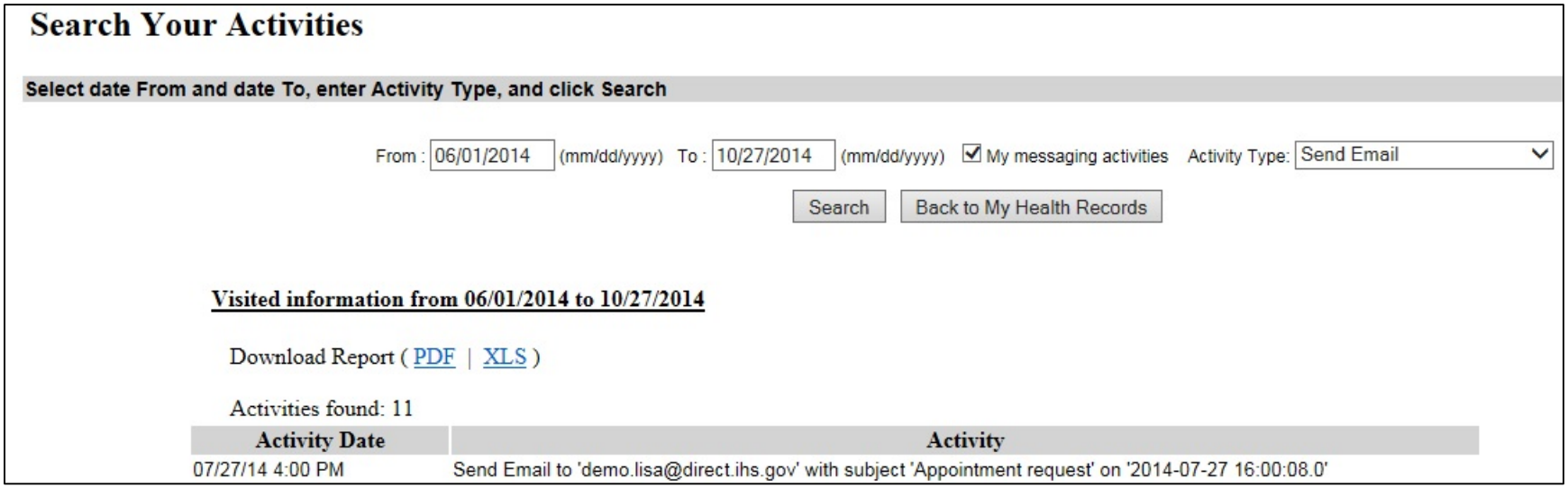
My Messaging Activity Log

- Search **My Messaging Activities** (test account).



My Messaging View Activity Type

- Search Results (test account).
- Download Report.



Other PHR Patient Functionality

- Update PHR profile settings.
- Update PHR password.
- Update PHR security questions.
- Change/remove access permissions.
- View other PHR accounts.
- Download raw visit information (XML).
- Help (user manual and FAQ).

Anticipated User Questions

- Is my information safe?
- Can I view my child's information?
  - Not at this time.
- I do not see my latest visit?
- How do I correct my information?
  - Protected Health Information (PHI) Form.
- How often is my PHR updated?
- Is the information in the PHR my complete IHS medical record?
  - No, some services, tests, and medical advice are marked as sensitive.
- Can I assess the PHR from my mobile device?
- I am a caregiver with access to someone else's PHR. Can I send a message to their healthcare team?
  - Not at this time.
- Other frequently asked questions can be found on the PHR FAQ page.

Patient Access (VDT) Measures

Meaningful Use Stage 2

- Eligible Provider Patient Electronic Access – VDT:
  - Measure A.
  - Measure B.
- Eligible Hospital Patient Electronic Access – VDT:
  - Measure A.
  - Measure B.

EP Patient Electronic Access Measures

- Measure A:
  - More than 50 percent of all unique patients seen by the EP during the EHR reporting period are provided timely (available to the patient within four business days after the information is available to the EP) online access to their health information.
- Measure B:
  - More than five percent of all unique patients seen by the EP during the EHR reporting period (or their authorized representatives) view, download, or transmit to a third party their health information.

EP Denominator and Exclusions

- IHS Measure Exclusion:
  - Case Management (clinic code 77), Laboratory Services (clinic code 76), Radiology (clinic code 63), Pharmacy (clinic code 39), and Emergency Room (clinic code 30) visits are excluded.
- Denominator:
  - The number of unique patients with one or more face-to-face visits with the EP as primary provider during the EHR reporting period, where the visit has a Service Category of A, S, O or M. Search for all visits up to the last day of EHR reporting period.
  - Exclusions: Any EP who: Conducts 50 percent or more of his or her patient encounters in a county that does not have 50 percent or more of its housing units with 3Mbps broadband availability according to the latest information available from the FCC on the first day of the EHR reporting period may exclude only the second measure.

http://www.broadbandmap.gov

EP Measure A Numerator

- Document either:
  - Patient education (Administrative Functions-Personal Health Record (AF-PHR)).

  or:

  - PHR handout was provided in the Patient Registration package before or during the report period.

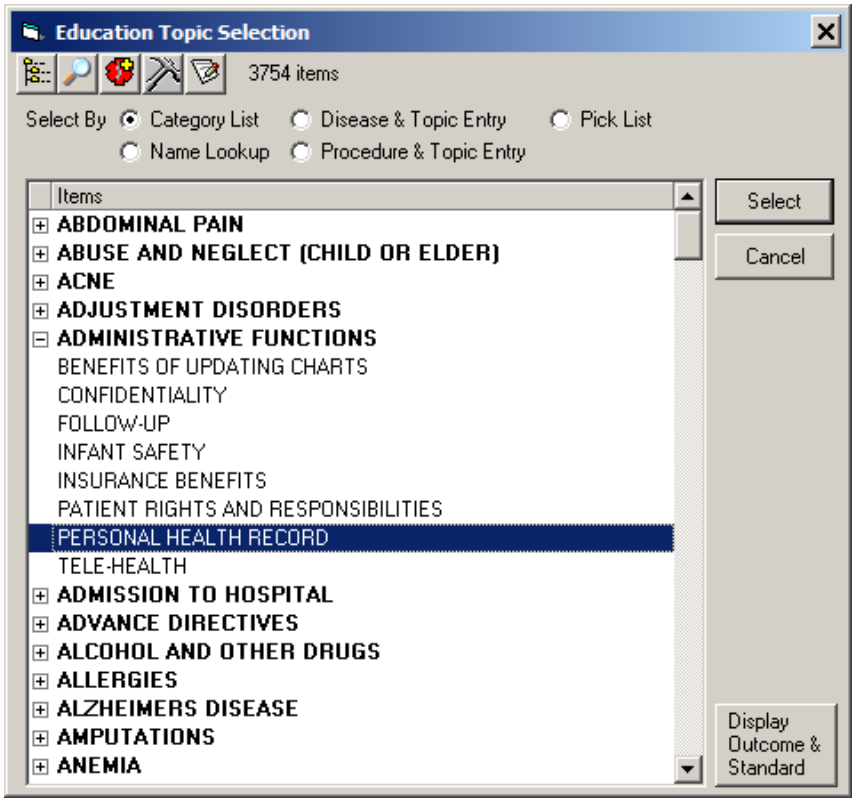
and:

- CCDA is updated (this should happen automatically every 24 hours).

  A CCDA receipt confirmation from the HIE is logged within four business days of the visit (original document) or four business days of the date/time last modified (information is updated, lab results update etc.).

PHR Education Topic

- Personal Health Record Education Topic EHR entry.



PHR Access Handout

The Personal Health Record (PHR) is a website where you can view your health information. Your PHR is at:

https://phr.ihs.gov

You need to have access to the Internet or a data connection to use the PHR. You also need to sign up for your PHR.

What can you do with PHR?

- View your lab results
- Learn about your medications.
- Keep track of your health issues.
- View a list of your medications.
- Save a copy of your health information.
- Send an e-mail message to your health care team.
- Make sure the information in your medical record is correct.
- View a record of your immunizations.
- Share your health information with a caregiver or family member.

Is your health information safe?

Yes, your health information is secure. Be cautious when viewing or downloading your health information to a public computer. Always log out when you are finished looking at your PHR.

PHR Personal Health Record

RPMS

PHR Personal Health Record

https://phr.ihs.gov

EP Measure B Numerator

- The number of patients who have logged into their PHR.
  - Details:
    - RPMS sends EHR reporting period date range and Patient ID from denominator and queries API BPHRMUM (located in namespace BPHR).
    - API BPHRMUM returns: Patients recorded as having access to PHR and Date PHR accessed.

EH Patient Electronic Access Measures

- Measure A:
  - More than 50 percent of all unique patients discharged from the inpatient or emergency departments of the eligible hospital or CAH (POS 21 or 23) during the EHR reporting period have their information available online within 36 hours of discharge.
- Measure B:
  - More than five percent of all patients (or their authorized representatives) who are discharged from the inpatient or emergency department (POS 21 or 23) of an eligible hospital or CAH view, download or transmit to a third party their information during the EHR reporting period.

EH Denominator and Exclusions

- Denominator:
  - Count the number of unique patients discharged from an eligible hospital inpatient or emergency department during the EHR reporting period. A hospitalization is defined with a Service Category of H. An emergency department visit defined as clinic code of Emergency Department-30 AND a Service Category of A. Search for all discharges up to the last day of EHR Reporting Period.
  - Exclusions: Any eligible hospital or CAH that is located in a county that does not have 50 percent or more of its housing units with 3Mbps broadband availability according to the latest information available from the FCC on the first day of the EHR reporting period is excluded from the second measure.

http://www.broadbandmap.gov

EH Measure A Numerator

- Document either:
  - Patient education (Administrative Functions-Personal Health Record (AF-PHR)).

  or:

  - PHR handout was provided in the Patient Registration package before or during the report period.

and:

- CCDA is updated (this should happen automatically every 24 hours).

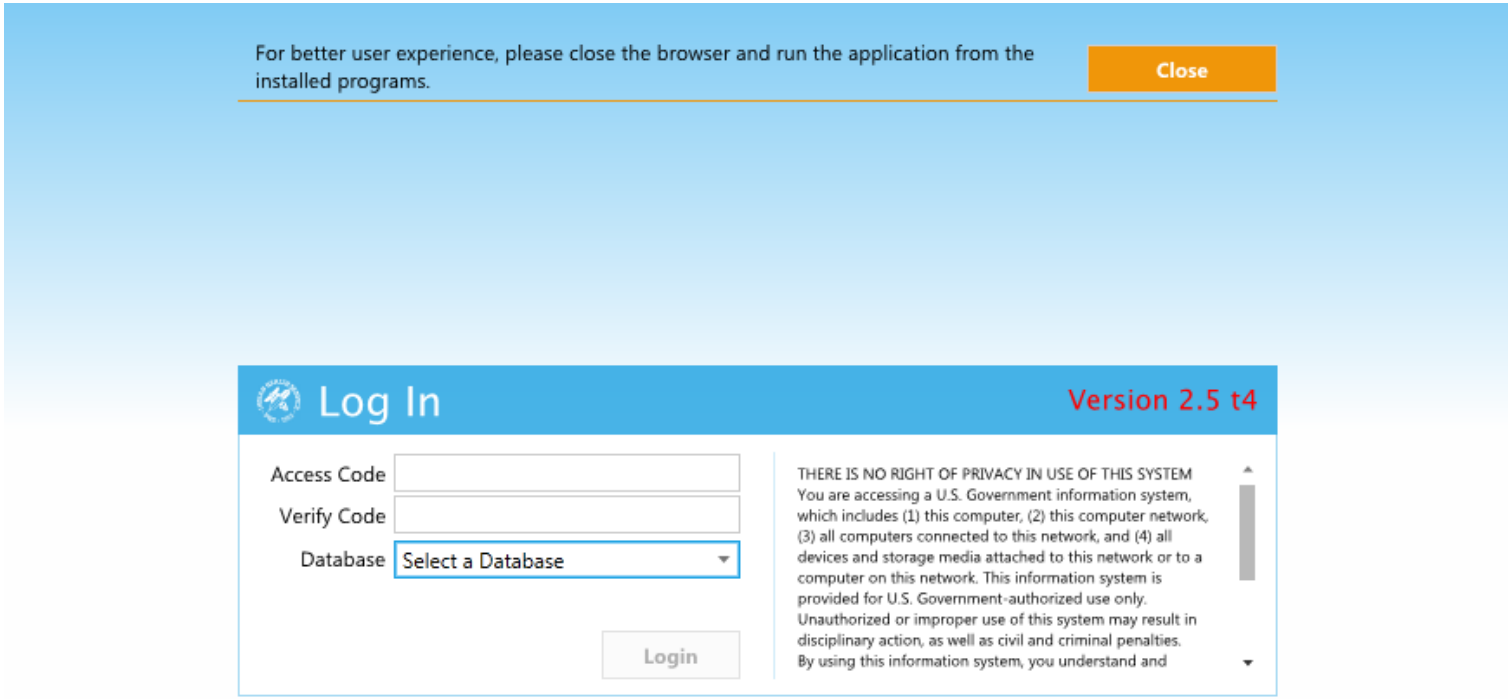
  A CCDA receipt confirmation from the HIE is logged within four business days of the visit (original document) or four business days of the date/time last modified (information is updated, lab results update etc.).

EH Measure B Numerator

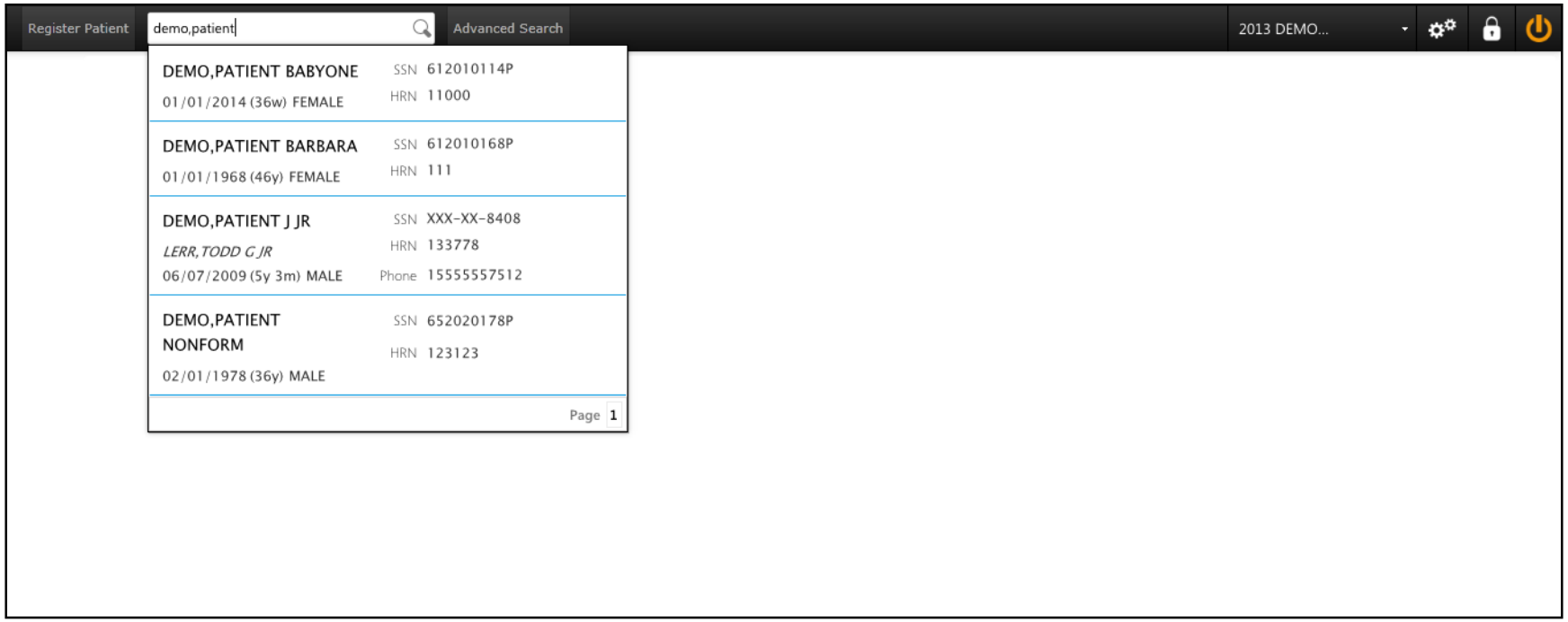
- The number of patients who have logged onto their PHR.
  - Details:
    - RPMS sends EHR reporting period date range and Patient ID from denominator and queries API BPHRMUM (located in namespace BPHR).
    - API BPHRMUM returns: Patients recorded as having access to PHR and Date PHR accessed.

EHR Patient Access Update

- BMW Web Browser Client.

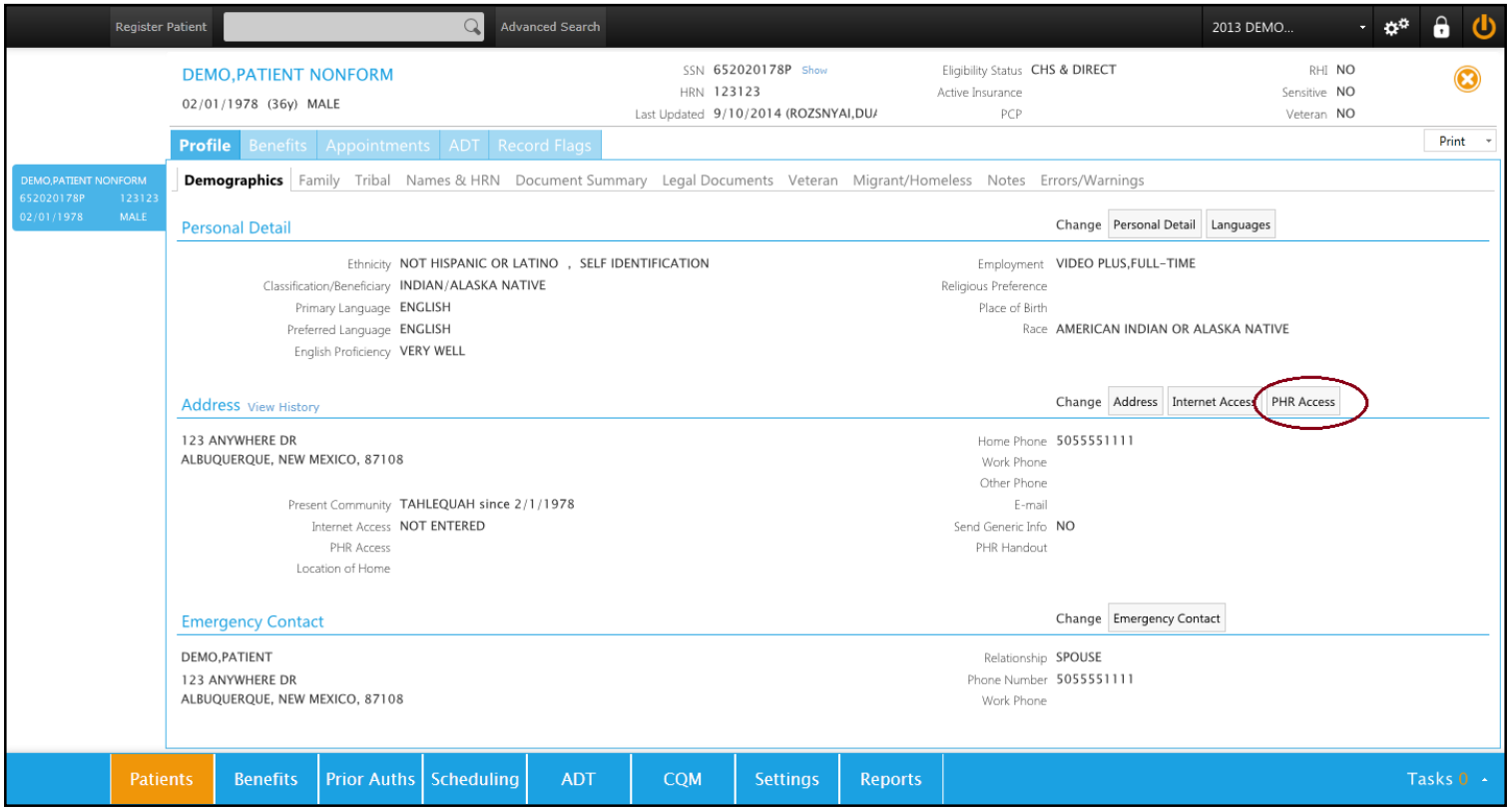


BMW Patient Search



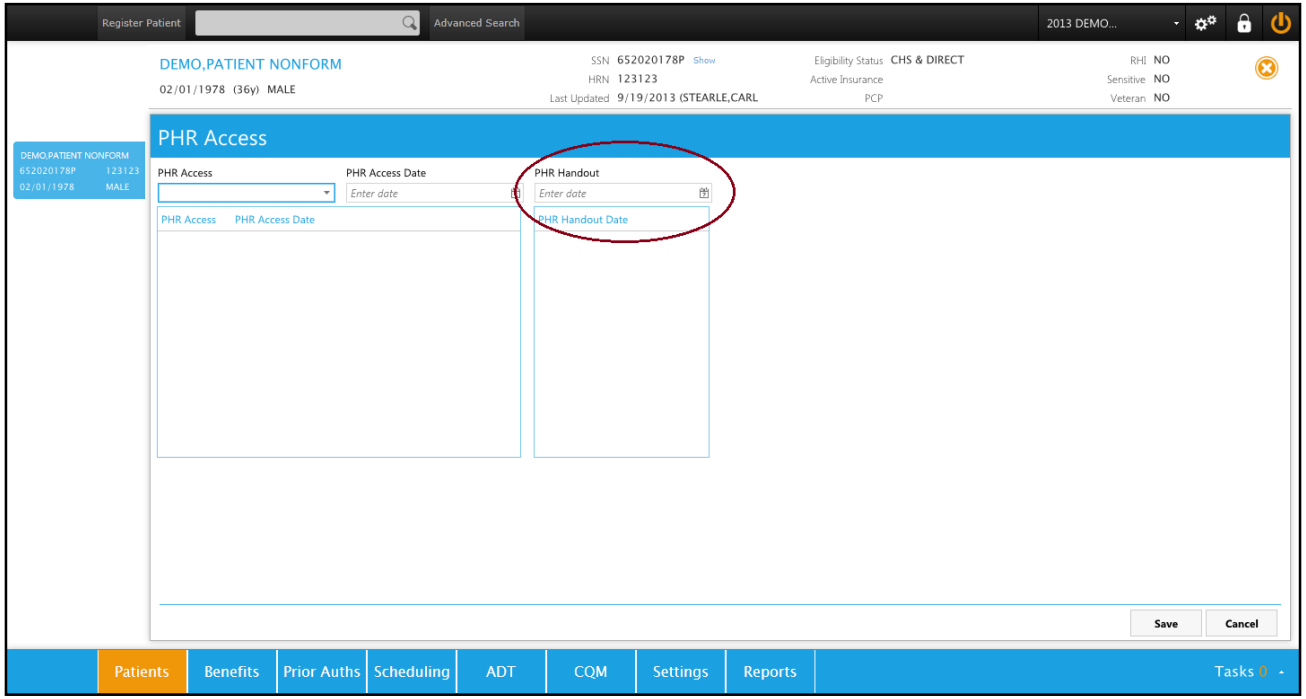
Patient Access

- Click **PHR Access**.



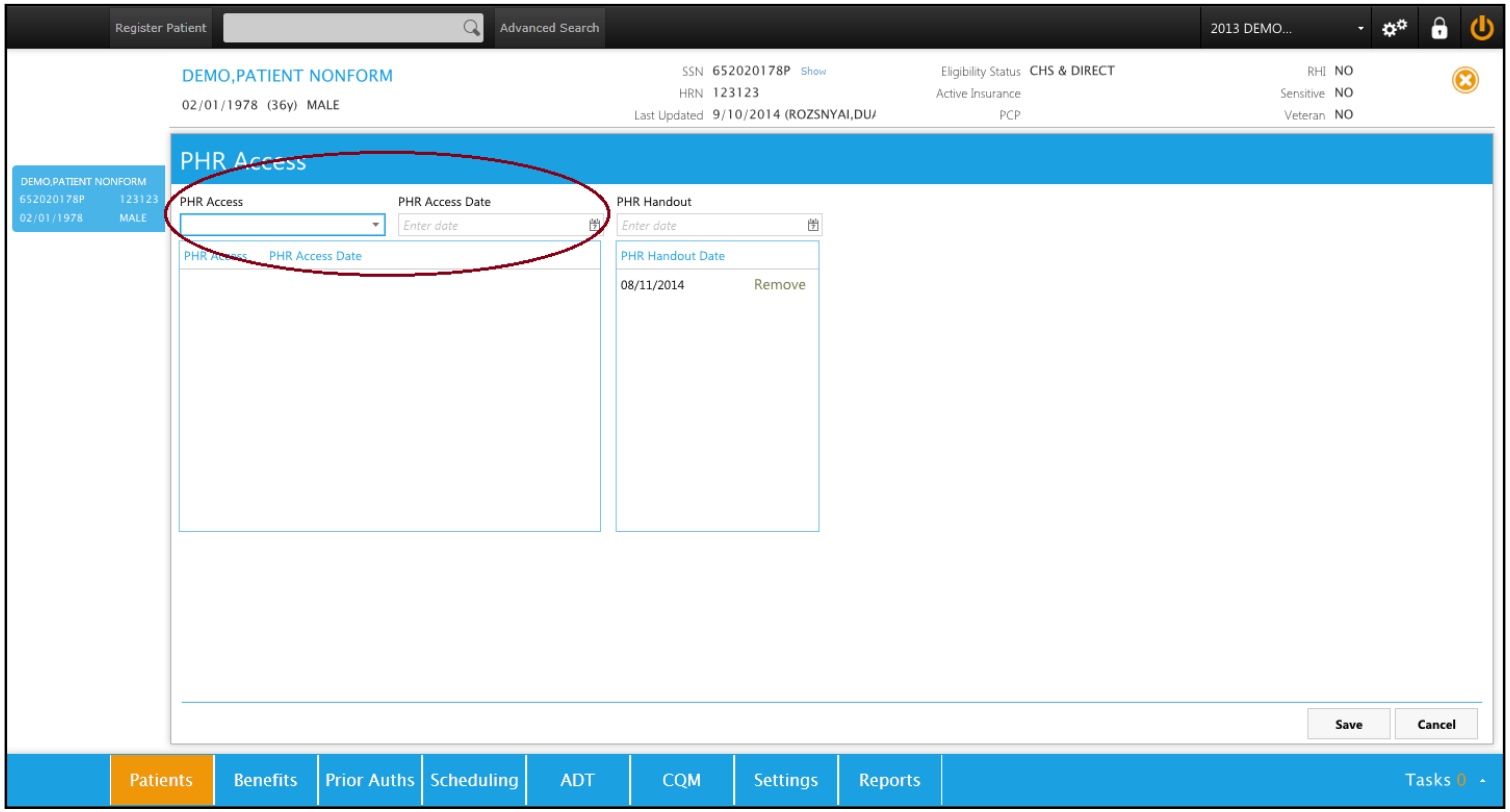
Record PHR Handout

- Numerator of Measure A.
- Enter **PHR Handout Date** and click **Save**.



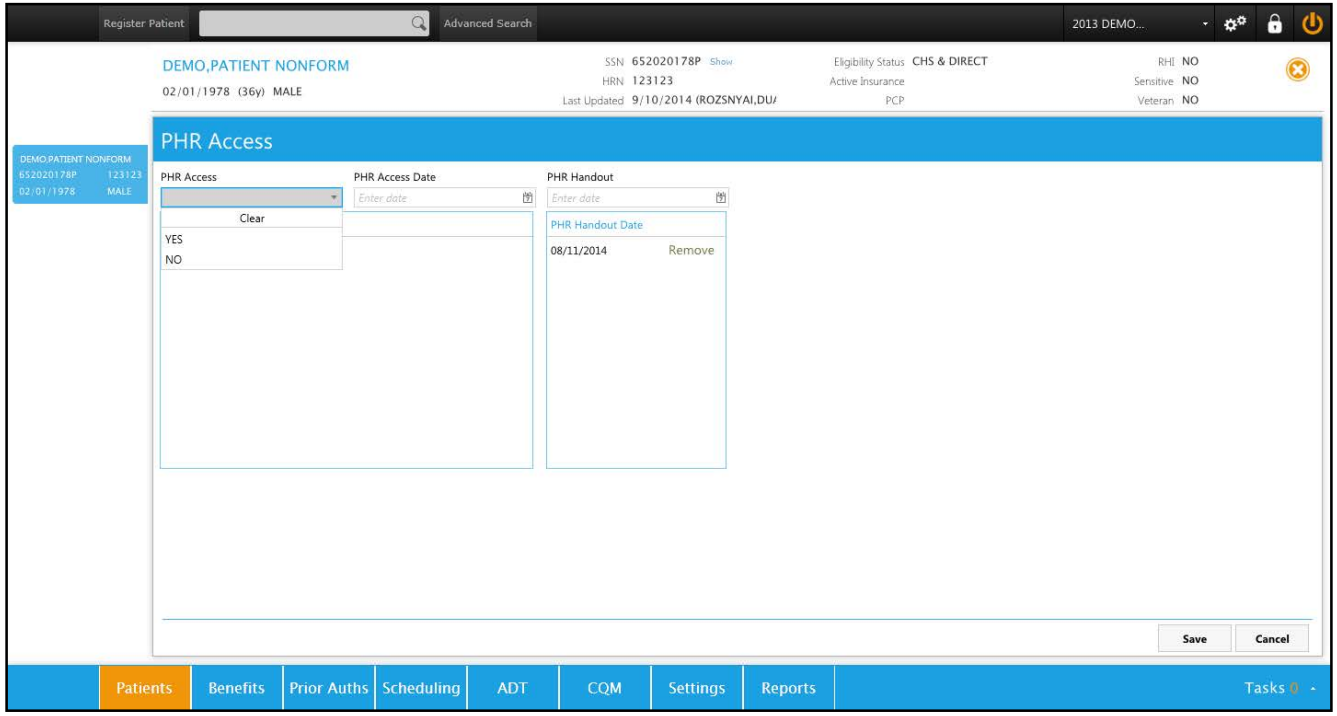
Record PHR Access

- Numerator of Measure B.

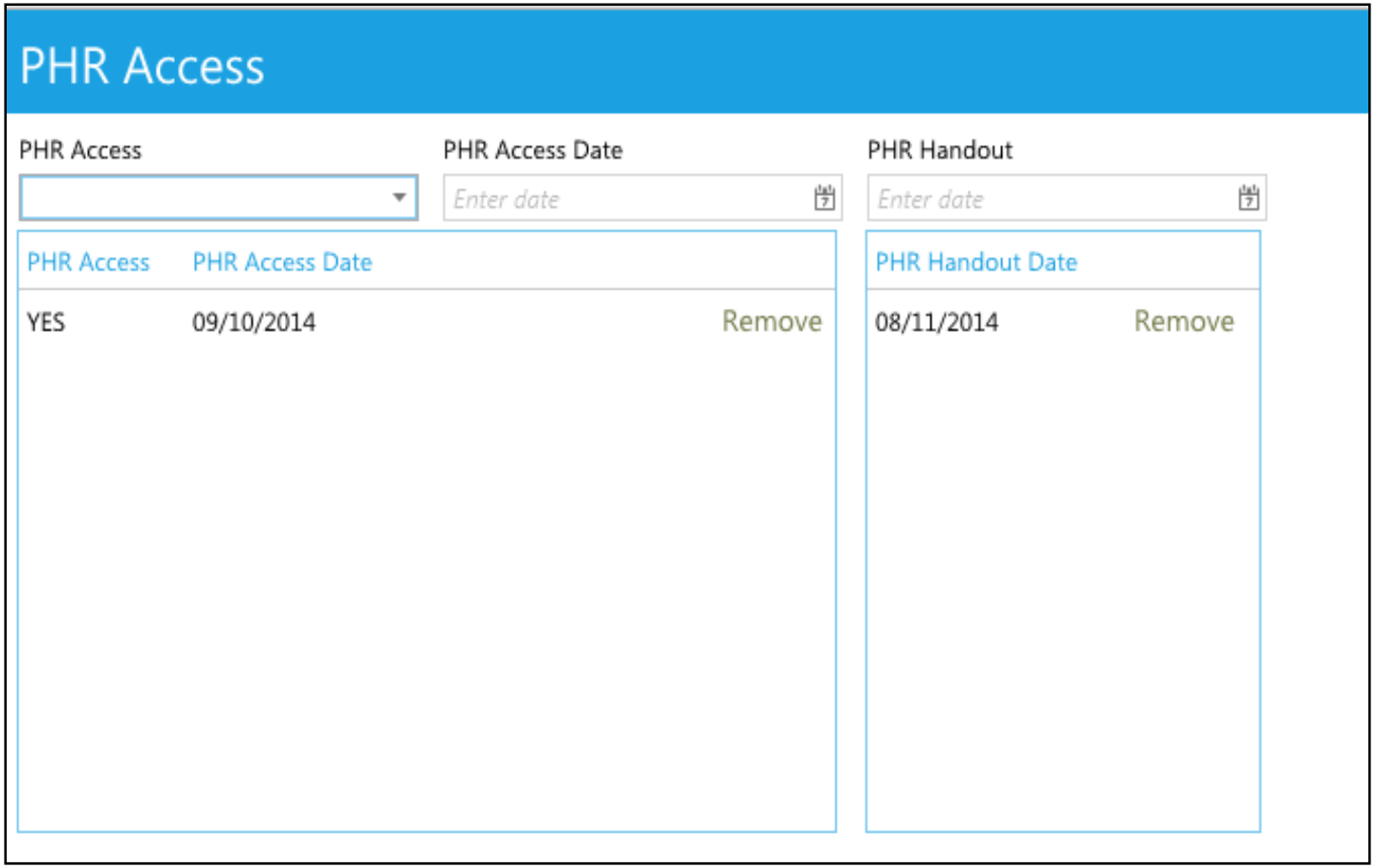


PHR Access Options

- Select **Yes** or **No** for PHR access.
- Enter **PHR Access Date** and click **Save**.



Patient Access Completed Entries



Questions and Discussion