This document explains how to use the HSX Query Portal in order to access the CDR.

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Requesting New User Accounts:
HSX asks that each organization contracted to access the CDR identify an Entity Security Administrator (ESA) who will be the only person able to request new accounts. The CDR Query Portal Access Request Form link can be found in the CDR section of https://hie.hsxsepa.org. Once the ESA submits a request form, HSX will create accounts within three business days and schedule training.

While completing the CDR Query Portal Access Request Form, the ESA will be asked what role each requested user holds in the organization. These roles relate to the permissions users have set up within the CDR. More information about the CDR Query Portal User roles can be found in the CDR section of https://hie.hsxsepa.org.

Deactivating User Accounts:
The ESA is the only person who can request that user accounts be deactivated. These requests should be emailed to support@hsxsepa.org within one business day of a user not needing an active account within the organization. HSX Support will confirm with the ESA when accounts have been deactivated, which will be within 24 hours of the request.

Making Changes to Existing User Accounts:
The ESA is the only person who can request other changes to user accounts. These requests should be emailed to support@hsxsepa.org when the need for changes arises. HSX Support will confirm with the ESA when the requested changes have been approved and made.

Password Expiration:
Every 90 days, all users with access to the CDR will be prompted to change their passwords. Users are unable to use the same password to log in more than once.

Account Lockouts:
Users will need to call HSX Support at (855) 479-7372 if they are locked out of their CDR accounts. Six failed attempts to log into an account will automatically lock it.
Audit and Monitoring:
HSX conducts routine audits of users who have access to the CDR in accordance with the HSX Audit and Monitoring Policy, which can be found on https://www.hsxsepa.org/policies.

Examples of inappropriate actions for search that could result in having a user account revoked are as follows:

- Unauthorized access to data for non-permitted purposes such as a licensed professional looking up information on individuals for whom there is no treatment relationship.
- Users looking at confidential information in a non-emergency situation without patient consent.

Any accounts that have not been used for 90 days will be set as inactive. If your organization has user accounts that have not been used within a 90-day period, HSX will notify the organization’s ESA. The ESA will need to confirm whether or not the user accounts should remain active or be inactive.

HSX Support:
If you need assistance, please contact HSX Support at (855) 479-7372 during business hours (8:30 am to 5:00 pm) Monday through Friday or email support@hsxsepa.org.
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Logging in:

1. Go to [query.hsxsepa.org](http://query.hsxsepa.org)
2. Enter the login credentials provided to you by HSX.
3. Click Login.

*Note: If the user is not actively using the CDR for 15 minutes, the user will be logged out of the system.

Logging Out:

1. To log out of the CDR, click “Sign Out” in the upper right corner.
Changing Your Password:

1. Click on your username in the top tool bar.
2. “Settings” will appear from the drop down menu.
3. Click “Settings”.
4. You will be redirected to this screen.
5. Click “Change My Password” on the left side of the screen.
Changing Your Password (cont’d.)

8. Enter current password.
9. Enter your new password once and then enter your new password again to confirm it.
10. Click “Submit”.
11. Your password will be changed.
Forgot Your Password:

1. From the login screen, click “Forgot Password?”. You will be redirected to this screen.

2. Enter your username for your HSX CDR account.
3. Click “Submit”.

An email will be sent to the email address registered with your HSX CDR account.
Forgot Username:

1. From the login screen, click “Forgot Username?”.

You will be redirected to this screen.

2. Enter the email address that is registered to your HSX CDR account.
3. Click “Submit”.

An email will be sent to your registered HSX CDR email containing your username.
How to Conduct a Patient Search:

1. After logging in successfully, you will be redirected to this page.
2. In order to look up a patient, you are required to enter either:
   • First Name, Last Name, Gender AND Date of Birth
   OR
   • Patient ID

*Note: The patient ID is typically the patient’s medical record number (MRN) from a HSX-participating hospital.

Using First Name, Last Name, Gender and Date of Birth for Patient Look-Up:

• Enter the patient’s first name, last name, gender, and date of birth in appropriate fields.
• Click “Submit”.
How to Conduct a Patient Search (cont’d.)

Using First Name, Last Name, Gender and Date of Birth for Patient Look-Up (cont’d.)

- When using first name, last name, gender, and date of birth to search for a patient, all patient demographics must be correct to match with correct patient.
- If any of information is incorrect, the patient will not be found in the CDR.

Using a Hospital MRN for Patient Look-Up:

- Enter the appropriate Patient ID.
- Click “Submit”.

![Patient Search Interface](image-url)

![Advanced Search Interface](image-url)
How to Conduct a Patient Search (cont’d.)

3. When patient information is entered correctly, you will be redirected to this screen.
4. The corresponding patient will appear.
5. Click on the patient’s name to view patient’s clinical information.

6. When you click on the patient’s name, patient clinical information will be displayed in the summary tab.
7. Click on an entry under a category to view more information.

CDR Content Example:

If you want to view Ambulatory Encounters, click “Mar 19 Routine Admission”.

[Image of a patient search interface]
CDR Content Example (cont’d.)

More detailed information about the selected ambulatory encounter for the patient will be displayed.

Viewing Restricted Data:

1. If a patient’s clinical record contains restricted data, you will be notified when you first view the patient’s information.
2. Only Clinical Users, such as Licensed Providers (e.g. MD/DO/NP) or Other Licensed Professionals (e.g. PA-C/MA/RN/LPN/CNA/CNM), have the ability to view restricted data for treatment purposes.
Viewing Restricted Data (cont’d.)

3. The tab with the red “V” and closed lock indicates that there is restricted data within the patient’s record (e.g. Conditions)
4. Restricted data can only be viewed if it is unlocked.

5. In order to view the restricted data, you must click “Unlock Confidential Data” either on the box at the top of the screen or clicking ‘Unlock Confidential Data’ on the left side menu.
Viewing Restricted Data (cont’d.)

6. After selecting to unlock confidential data, a box will appear on the screen. Select “Restricted and Very Restricted Data” and indicate the reason for accessing the restricted data.

7. Click “Save”.

8. The opened lock indicates that the confidential data is unlocked and can now be viewed.
Downloading a Continuity of Care Document (CCD):

1. From the patient’s summary tab, click “Download CCD” from the “Patient Actions” box on the left side of the screen.

3. Enter the Start Date and End Date between which you want to receive information in a CCD from the CDR.
4. Click “Download”.

*Note: Only select users have the ability to download information from the CDR.
Downloading a Summary PDF:

1. From the patient’s summary tab, click “Download Summary PDF” from the “Patient Actions” box on the left side of the screen.
2. In your internet browser, another tab should open with a summary of what’s contained in the HSX CDR for the patient.

*Note: Only select users have the ability to download information from the CDR.
Configuring the Layout of Clinical Information:

1. To change the layout of clinical information that is being displayed in the summary tab, click “Configure Layout” on the left side of the screen.
3. To customize the order of the clinical sections, click and drag the clinical headings to the boxes where you want them to appear on the summary tab when you log in.
4. Click “Submit” to save changes.
Configuring Layout (cont’d.)

1. Putting more than 2 clinical headings in one box will make them appear like a tabbed folder on the summary tab.
2. Once changes are submitted, the configuration will be saved for future use.