PointClickCare®

Patient Search
User Guide

Version 2.1 | August 2024

Patient Search allows authorized users to access medication and clinical histories to improve direct patient care for individuals in non-routine care settings, such as shelters, medical surge sites, and other alternate care sites. It can also be used to support public health activities, including epidemiological assessments, contact tracing, and clinical case augmentation.

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1 Patient Search

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2 Who Will Use This Guide?

Patient Search User: this role can access the Patient Search application to query for and view clinical documents and medication fill history for patients during a declared emergency.

Other Important User Roles:

System Administrator: this role can create and manage Events during an emergency, adjust configuration settings using the Administrator Dashboard, retrieve reports, and perform User, Organization, Facility, and Source Management functions for all Organizations.

Event Administrator: this role can create and manage Events during an emergency for all Organizations.

Organization Administrator: this role can manage Events during an emergency and manage Users and Facilities/Locations within their own Organization, create new subordinate Organizations, and manage the Users and Facilities/Locations in those Organizations.

Organization Manager: this role can manage Users and Facilities/Locations within their own Organization.

Auditor: this role can generate Reports for user activity at a global level within the system.

Emergency Census User: this role can access the Check-In and Check-Out screens to register individuals who have arrived at an alternate care facility and discharge them upon their departure.

Missing Persons User: this role can access the Missing Persons application to upload search lists.

Executive Sponsor: this role has the legal authority over system implementation in your state or jurisdiction.

3   Resource Hub

The Resource Hub can be accessed by clicking on the question mark icon in the page header and contains "**Guide Me**" User Walkthroughs and "**Help Me**" Quick Start Guides. The options displayed when a User clicks through the Resource Hub will depend on the page from which the User is accessing it and the roles assigned to the user.
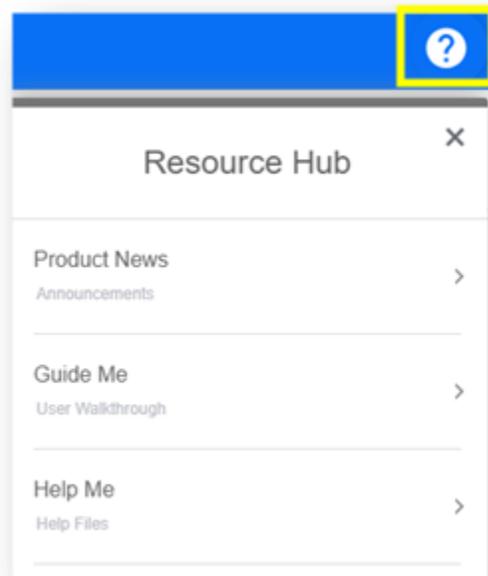
"**Guide Me**" User Walkthroughs provide step-by-step instructions for Patient Search Users on the bottom-right corner of the page.
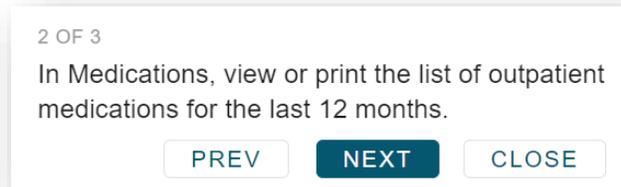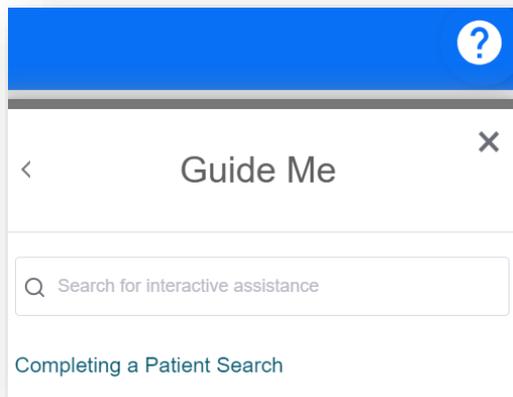
At the end of the instructions, a link to the "**Help Me**" Quick Start Guide is also provided.

Click **Documents**, select 1 or more records, then click **Request Documents**.

Click a document to view or print the patient's clinical information.

Learn more: Completing a Patient Search Quick Start

PREV   CLOSE

"**Help Me**" Quick Start Guides display the steps to complete a function on a linked pdf.

Help Me

Search for answers

Completing a Patient Search Quick Start

View All Help Resources
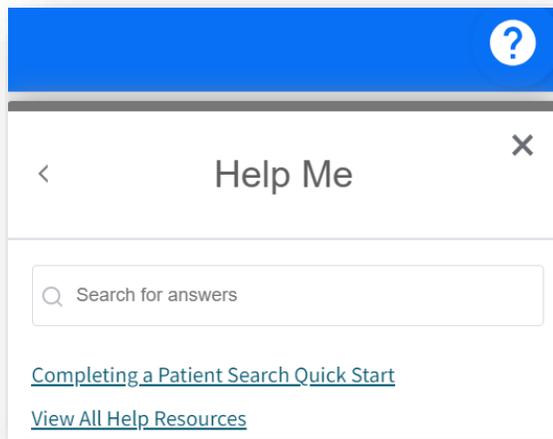
PointClickCare®
Completing a Patient Search Quick Start

This quick start guide provides the steps to complete a patient search. You can search for patients to view and print a list of outpatient medications for the last 12 months and view clinical documents.

Step	Action	Application View
1.	**Searching for a Patient** 1. Complete the patient information. NOTE Complete all the fields for the best search results. 2. Click **Search Patient**.	
2.	**Viewing and Printing Medications** 1. Click Medications. 2. View or print the list of outpatient medications for the last 12 months.	
3.	**Accessing Documents** 1. Click Documents. 2. Select 1 or more records. 3. Click **Request Documents**. 4. In Retrieved Documents, click a document to view or print the patient's clinical information.	
4.	**Viewing and Printing Clinical Documents** 1. Scroll to view the information in the clinical document. 2. Navigate to a specific section in the document by clicking a link at the top of the page.	

Note: Users will have to enter an email address on the landing page before accessing Quick Start Guides.

4   User Access

4.1   First Time Login

There are two environments: STAGE, which is used for training, and PRODUCTION, which is used for actual response. The steps for access are the same for both environments, though your system administrator may restrict access, particularly when the PRODUCTION site is not activated for a response. To access Patient Search, your Administrator must create a user account for you in the STAGE or PRODUCTION environment, or both. Once your account has been created, you will receive an email notification like the one below. The [ORGANIZATION] and [link] will vary based on your Executive Sponsor. Within the email, select the hyperlink provided.

> Your [**ORGANIZATION**] account has been created; your username is [username]. To log in, click the link [link] and complete the steps to finish setting up your account.
> If the link above is not clickable, please copy and paste the URL into your browser's address bar. This link is valid for the next 1 hour(s). If the above link has expired, you can click Forgot Password on the Login screen [link] to receive a new link.
> Sincerely,
> The Team at [**ORGANIZATION**]

> [**!**] **Tip!** Make sure that the system email address no-reply@ainqapps.com will populate to your inbox, so that emails do not end up in your junk/spam folder. The link is only valid for an hour. If the link expires, follow the Password Reset process in section 4.2.

Create a password, noting password requirements:

Passwords must contain a minimum of 10 character(s), 1 number(s), 1 lowercase letter(s), 1 uppercase letter(s), and 1 symbol(s).

Once you have successfully created your password, you will be directed to the login page. Enter your username and new password where indicated. When finished, select "Login."
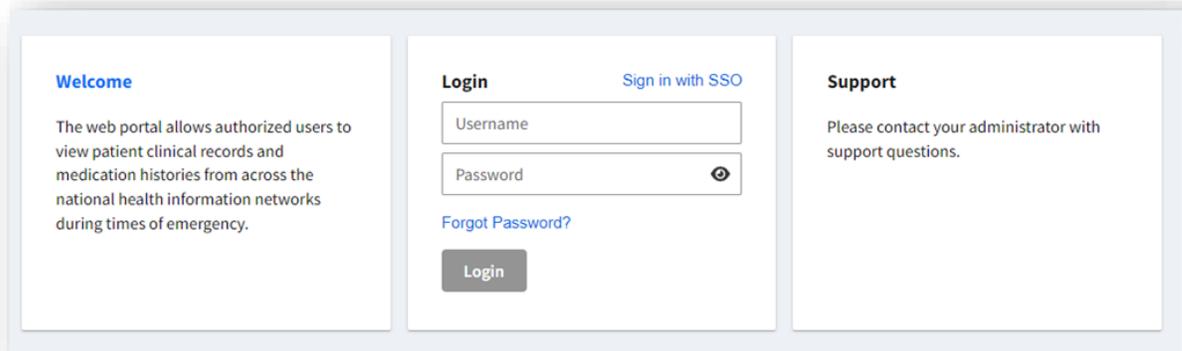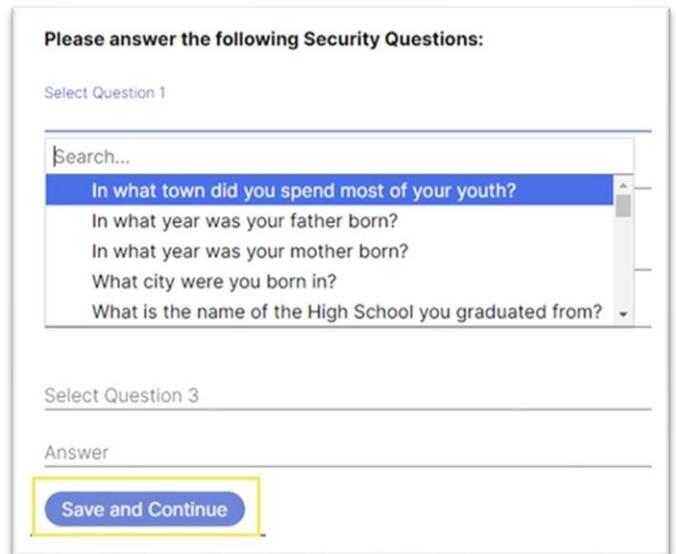

You will then be directed to the Terms of Use. Please read the Terms of Use for information regarding appropriate legal uses of the system (also available in Appendix A). To navigate to the next page, select the "I Agree" button at the bottom of the page. You will be required to re-review and agree to the Terms of Use if your account gets reactivated after being inactivated or when the Terms of Use language has been updated.

You will be directed to the Security Questions Page. Select three security questions from the drop-down options and enter your responses into the "Answer" field. Once completed, select the "Save and Continue" button. These security questions will be used if you forget your password in the future and need to reset it.

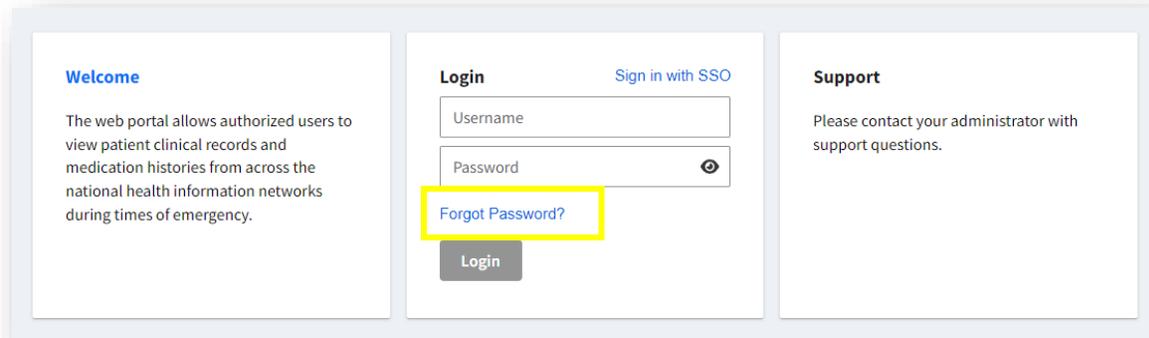**Note:** Answers to the security questions are case sensitive.

4.2   Password Reset

To reset a forgotten password, navigate to the homepage. Select the "Forgot Password" button on the login screen.

Enter your username where indicated and select "Request Password."

You will receive an email titled "Request to Reset Password." Select the hyperlink within the email.

This will bring you to a page asking for the answer to one of the security questions you set up during the account creation process. Type in your answer. When finished, select "Next."

Tip! If a User forgets the answers to their security questions, an Administrator can reset their account. Resetting a user account allows the user to choose new security questions.

If you successfully answer the security question, you will be redirected to the Set Password screen, where you can create a new password. When finished, select "Submit."
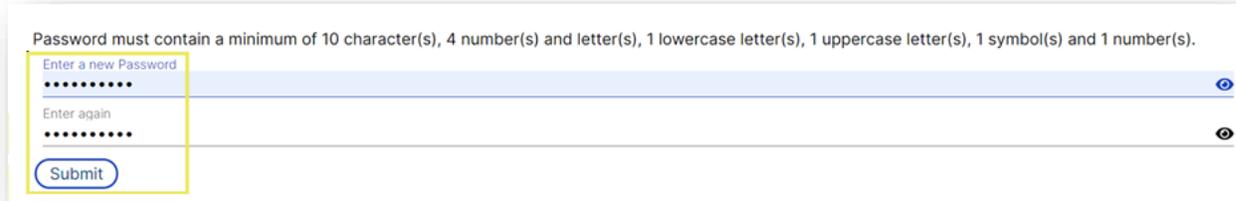
After selecting "Submit," you will be redirected to the login screen where you can enter your new password along with your username.

The Password Reset workflow is available for users who have forgotten their password, but still know their username. If you forget both your username and password, please contact your Administrator for assistance.

4.3   Password Expiration

Passwords for Administrators roles will expire after 90 days. Passwords for all other roles will expire after 60 days. Users will receive emails beginning seven days prior to expiration. Once the password expires, the users will not be able to log in until the password is reset by clicking the "forgot password" workflow.

5   Patient Search

5.1   Accessing Patient Search

Once logged in, you will land on a Dashboard displaying the application(s) available to you based on your role(s). Click on the "Patient Search" box to go to the application.
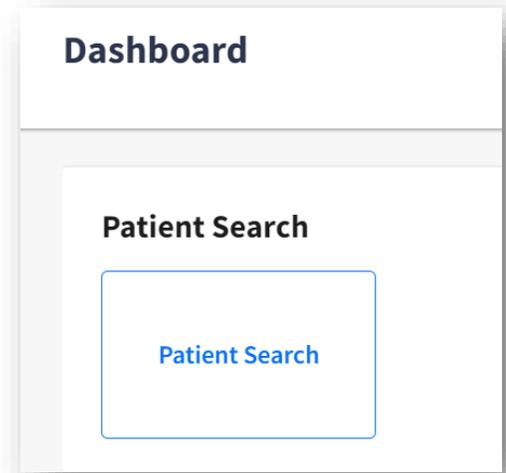
You can also navigate to Patient Search by selecting "Patient Search" from the apps icon ("Waffle Menu") in the top-right corner of the screen.

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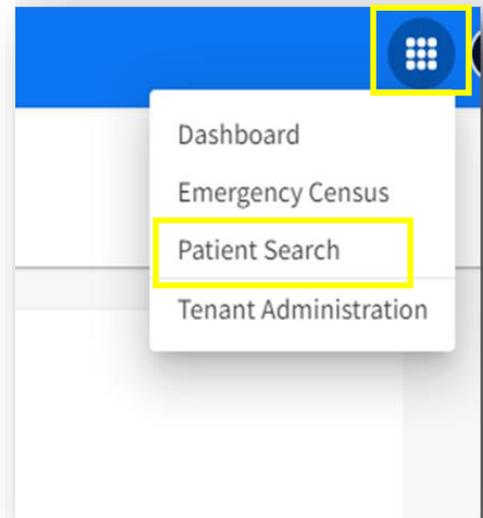
5.2   Alternate Care Facility (ACF) Selection

Once you navigate to Patient Search from the Dashboard, you will be asked to select the Alternate Care Facility (ACF) where you are located. Your organization may use terms such as Alternate Care Site (ACS) or Medical Shelter instead of ACF. If you do not see your location or facility, contact your Administrator.

Choose one of the suggested ACF locations, or search for the desired ACF using the search bar at the top of the list. After you have selected the ACF, select "Continue" at the bottom of the page.

> ⚠ **Note:** If you have selected the incorrect ACF and clicked "Continue," logout and repeat the process to select the correct ACF.

If you log in and there are no available or active ACFs, you will receive a "No active locations available" message and should contact your Administrator if you believe there is an issue.

Alternate Care Facility

🔍 Search...

No locations available.

Please ensure the locations are active and associated with an active emergency event.

Continue
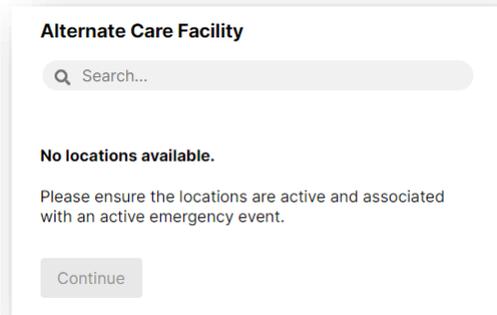
If an Administrator enters Address, Point of Contact, Email, Phone, and Comments information while creating the Alternate Care Facility, that information will be displayed when you click on the location icon located next to the ACF name located at the top right of the screen.

📍 Montgomery County - Garrison Highschool

Address:
3406 Garrison
Point of Contact:
Email:
Phone:
Comments:
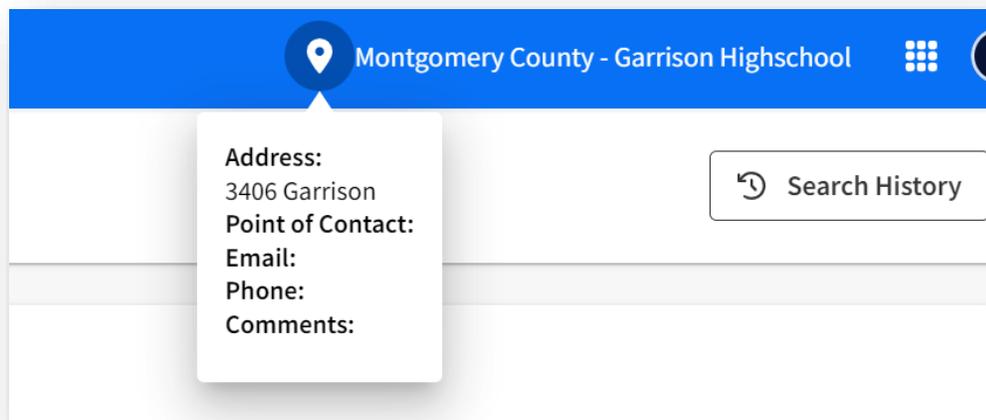
🕓 Search History

5.3   Search for a Patient

On the Patient Search Homepage, you can search for a patient's clinical information from the national health information networks and the last 12 months of medication fill history through Surescripts ®.

To search for a patient, enter all available patient demographic information into the appropriate Patient Search fields. At minimum, you are required to enter Last Name, First Name, Date of Birth, and Gender in order to perform a Search. **To get the best matching results, enter as much demographic information on the patient as possible**. It is recommended that you enter Last Name, First Name, Date of Birth, Gender, City, State, and ZIP Code for the national health information networks and Surescripts ® to match a patient and return a result. Searches with only the minimum required fields are not likely to return any results.

If you leave any required field empty, you will receive the following error message prompting you to fill in the missing information. You will not be able to complete a search without the required fields.

When you are finished entering all available demographic information for the patient, select "Search Patient"

After selecting "Search Patient" the system will send the patient search query to the national health information networks (see section 6.1: National Health Information Networks for more information).

While the system performs this search, you will see a spinning icon titled "Retrieving Data." Please allow up to 2 minutes for the search results to be returned.

Note: If you do not find any patient matches, check that you entered the patient demographics correctly and/or enter additional demographic information.

If demographic information needs to be added or changed, or if you want to search for a new patient, select "New Search" to return to an empty Patient Search table to begin a new query.

If your organization has a valid National Provider Identifier (NPI), you will first see the "Medications" tab, which includes data returned from the Surescripts® network. You can toggle to the "Documents" tab to see the results returned from the national health information networks.

> **Note:** Search results are cached for 24 hours. If a Patient Search User enters the exact same information in the Patient Search fields, a new query will not be sent and the system will respond with the same results that were returned during the initial search. Any change to the information entered in the Patient Search fields will result in a new query. See section 5.10 (Search History) below for more information.

5.4   Retrieve Medication History

If there is a successful match on the Surescripts® network to your patient's demographic information, medication history will display in the Medications tab. Surescripts® displays the previous 12 months of fill history of each medication, along with instructions when provided by Surescripts®. If you click the name of the "Prescriber," available contact information will display.

Certain medications may be missing from the list on the medications tab. As a best practice, you should check documents for any medications that may appear there as well (see sections 5.6 and 5.7 on querying for and retrieving documents below).

5.5   Print Medication List

You can print the list of medications by selecting the print (🖨) icon located at the top right of the medications tab.

5.6   Clinical History

If you toggle to the "Documents" tab, while the system performs the patient query, you will see a spinning icon titled "Retrieving Results" on the right-hand side of the screen.

Please allow up to 2 minutes for the search results to be returned. Patient Search will display "Success" if a response is received.

If no results are returned because there isn't a patient match, a "No results were found for this patient." message will be displayed. It will display a time out message if no response is received.

Note: Source organizations use varying matching algorithms, so it is important to input as much demographic information as possible to ensure the highest likelihood of a match. If you have patient information that was not entered during the initial search, search again using all known information to improve your chances of returning results.

If no results were returned because of an error, a "We're unable to retrieve results at this time. Please try searching again." message will be displayed. If you try searching several times and receive this same error, contact your Administrator for additional assistance.
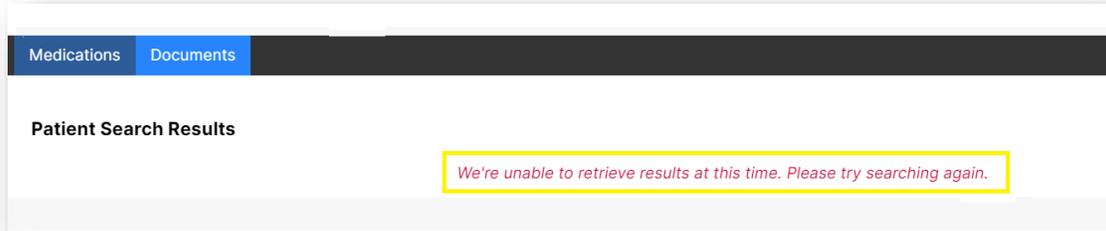
If there is a successful match, the responding source organizations will be listed under Patient Search Results.

Search results will continue to populate as matches are retrieved. You may sort the results by Patient, Date of Birth (DOB), Gender, Address, Phone, and Source by using the arrows at the top of each field.
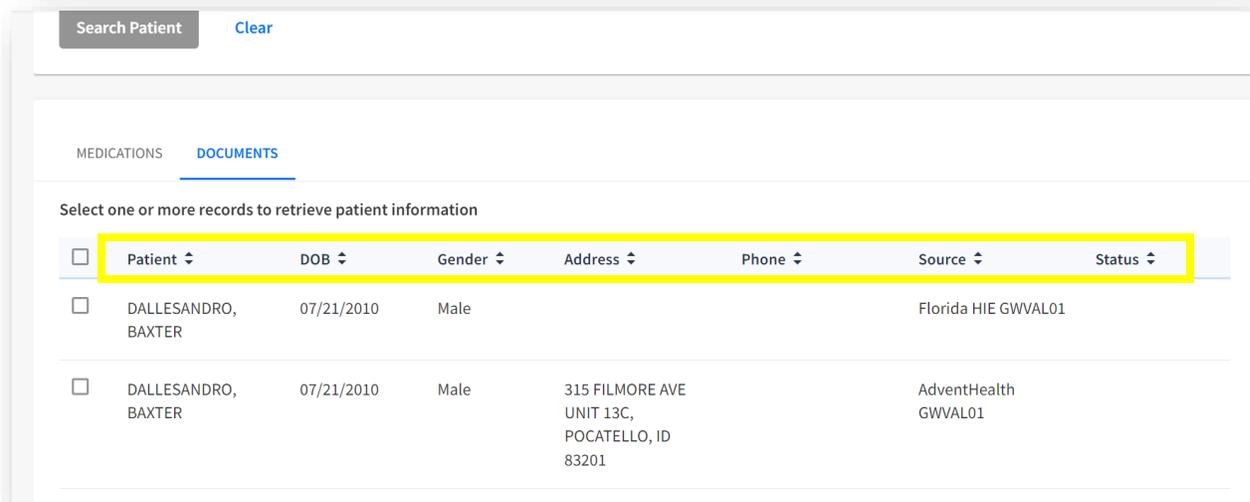
From the results listed, select the patient record(s) that best fits the patient demographic information entered. For added accuracy, attempt to get as much information from the patient as possible about their recent healthcare visits to verify the most up-to-date data.

Refer to the "Source" column to identify the facility returning the patient records if you are searching for a specific encounter.

You may unselect the patient records by clicking on the "Clear Selection" on the top left corner.
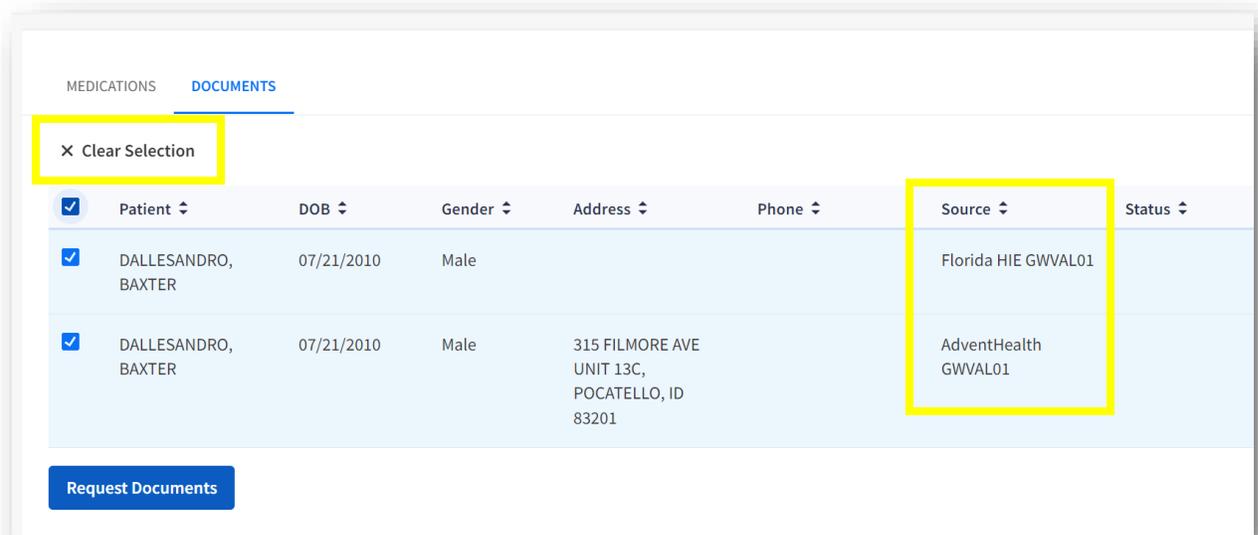
5.7   Query for a Document

When you have selected the patient results that are of interest to you, click "Request Documents" at the bottom of the screen. A query will be sent to retrieve any patient documents available from the source(s) you selected.

	Patient ⇕	DOB ⇕	Gender ⇕	Address ⇕	Phone ⇕	Source ⇕	Status ⇕
☑	DALLESANDRO, BAXTER	07/21/2010	Male	315 FILMORE AVE UNIT 13C, POCATELLO, ID 83201		AdventHealth GWVAL01	✔ Success
☑	DALLESANDRO, BAXTER	07/21/2010	Male			Florida HIE GWVAL01	✔ Success

MEDICATIONS   DOCUMENTS

✕ Clear Selection

Request Documents

Please allow up to 2 minutes for the search results to be returned. Patient Search will open the document if a response is received. It will display a time out message if no response is received, and an error message if an errored response is received.

5.8   Retrieve Documents

The information returned through the system includes data available for exchange among National Health Information Network Participants at the time of the query. This means that the response may not include the individual's full and complete medical history. Please use reasonable clinical judgment in interpreting the results of your Patient Search.

When the document query is complete, the results will be displayed under the Retrieved Documents heading.

Retrieved Documents

Certain clinical information may be missing from the list below. You should independently verify clinical history with the patient.

Q Search...

Title ⇕	Source ⇕	Service Time ⇕	Author ⇕	Author Institution ⇕	Type ⇕
BAXTER Test CCDA 01	FLHIE VAL Hospital FLHIE VAL Practice Setting	2020-01-09 05:00 2021-04-22 04:00	Test Author 1 Primary Care Provider, General	FLHIE VAL	Summarization of Episode Note
Aggregated CCD	Health encounter sites General Medicine		HIE-Engine	Adventist Health System	Summary of Episode Note

You can use the "Search..." bar to search for a specific document within the returned results. Using the arrows at the top of the result columns, you can sort the retrieved documents by Title, Source, Service Time, Author, Author Institution, and Type.

> **[!]** **Note:** While we predict that each patient should have between one and ten documents, some patients may have zero documents (even if there is a positive match), and some may have many. If there are no documents found for a patient, "No documents found!" will display below "Request Documents."

DOCUMENTS

✕ Clear Selection

☑	Patient ⇕	DOB ⇕	Gender ⇕	Address ⇕	Phone ⇕	Source ⇕	Status ⇕
☑	Demoski, Henry	08/01/1981	Male	225 Baker St, Atlanta, GA 30313	140-455-54000	North Carolina Health Information Exchange Authority GWPRD01	� No results

Request Documents

No documents found!

All fields are populated based on information provided by the data source:
- **Title**: the name of the document generated
- **Source**: the name of the facility and department where the document was generated
- **Service Time**: if available, the date and time a service was rendered associated with the document
- **Author**: the name of the individual that authored the document, or else the author's location
- **Author Institution**: the location where the author generated the document, or the organization that provided the document
- **Type**: the type of document provided, according to the source organization

To view a document, click on the name of the document in the left-hand column of the Retrieved Results (under the "Title" heading). While the system retrieves the document, you will see a spinning icon titled "Retrieving results." Please note that the system will attempt to retrieve documents for up to 90 seconds.

The document of interest will appear in a pop-up window once it has been retrieved. Depending on the type of document, it will contain various information.

Retrieved Documents

Certain clinical information may be missing fr[...]
history with the patient.

Retrieving results...

Title ⇕	Source ⇕
BAXTER Test CCDA 01	FLHIE VAL Hospi[...] FLHIE VAL Practi[...] Setting
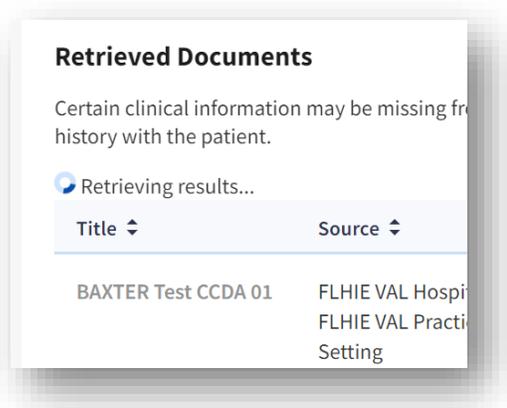
In the example below, this Continuity of Care Document (CCD) shows patient demographic information, and may include Allergies, Medications, Active Problems, Social History, Last Filed Vital Signs, Plan of Treatment, and Results. To jump to a specific section, select the link to the category at the top of the document. Each category can be collapsed to reduce document length.

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Print   X

CHDRONE CHDRZZZTESTPATIENT

Community Health and Hospitals: Health Summary   Generated on Jun 13, 2019, 11:38:53

Demographics   Allergies, Adverse Reactions & Alerts   Encounters   Immunizations   Medications   Problems   Procedures   Results   Social History   Vital Signs   Document Information

˅ Demographics   Return to top
Male, DOB: Mar 3, 1960

Patient Address	Communication	Language	Race / Ethnicity
Primary Home:	Tel: (760)-222-5555	Unknown	Asian / Not Hispanic or Latino
1234 Howard St.			
LA JOLLA, CA 92038, US			

˅ Allergies, Adverse Reactions & Alerts   Return to top

Group Description	Code System	Code	Code Description	Severity	Susceptibility	Date and Time	Status
Allergy to Eggs	UNII	291P45F896	Eggs	Mild	Very susceptible	03-31-2010 10:00:00	Active
	ICD-9-CM	V15.03	Allergy to eggs				
Amikacin	RxNorm	905148	Amikacin Sulfate 50 MG/ML Injectable Solution	Mild to moderate	Very susceptible	03-31-2010 10:00:00	Active
Penicillin V	NDF-RT	N0000011298	Penicillin V	Mild to moderate	Very susceptible	03-31-2010 10:00:00	Active

˅ Encounters   Return to top

To help navigate within the CCD, you can select the "Return to top" link within each section to be brought up to the top of the page.

˅ Allergies, Adverse Reactions & Alerts   Return to top

Group Description	Code System	Code	Code Description	Severity	Susceptibility	Date and Time	Status
Allergy to Eggs	UNII	291P45F896	Eggs	Mild	Very susceptible	03-31-2010 10:00:00	Active
	ICD-9-CM	V15.03	Allergy to eggs				
Amikacin	RxNorm	905148	Amikacin Sulfate 50 MG/ML Injectable Solution	Mild to moderate	Very susceptible	03-31-2010 10:00:00	Active
Penicillin V	NDF-RT	N0000011298	Penicillin V	Mild to moderate	Very susceptible	03-31-2010 10:00:00	Active

˅ Encounters   Return to top

Group Description	Code System	Code	Code Description	Date and Time	Status
Encounter Office Visit	CPT	99212	Office/outpatient visit, est	03-31-2010 10:00:00	Performed

5.9   Print Document

You can print documents by selecting the "Print" icon located at the top right of the CCDA.
Once you are finished with the document, click the "X" in the top right-hand corner of the window.
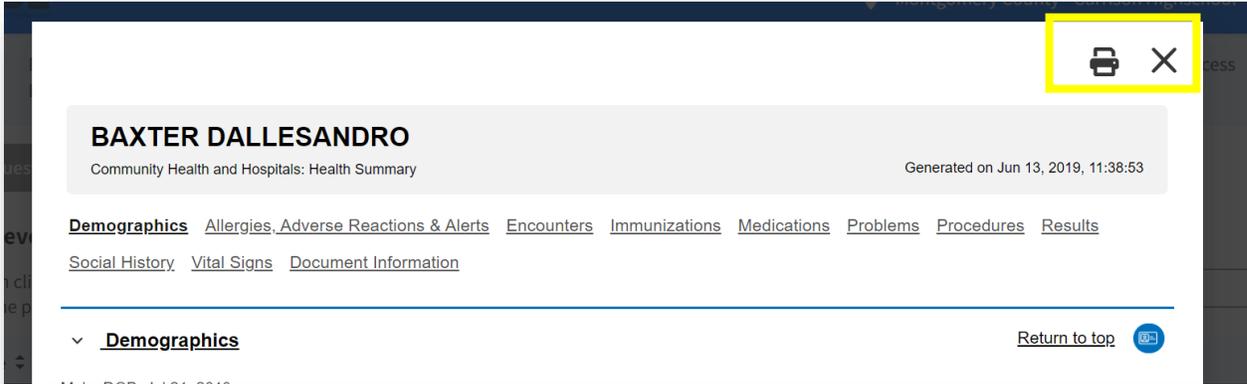
Note: to print documents with embedded PDFs, the user will select "Download PDF" above the embedded PDF within the CCDA.
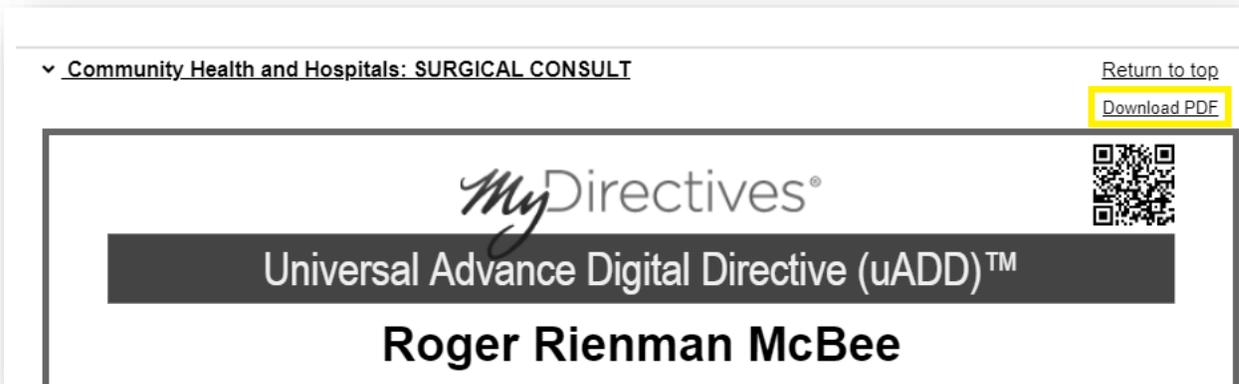
5.10 Edit or Reset Patient Search

If you want to modify the patient search criteria you entered, you may edit them at any time and click "Search" again.

Patient Search

⊘ **For best results, please provide all available information.** *fields are required.

Last Name *	First Name *	Middle Name	Date of Birth *	Gender *
CHDRZZZTESTPATIENT	CHDRONE		03 / 03 / 1960	Male

Address	City	State	Zip Code	Phone
1234 Howard St	La Jolla	California - CA	92038	

Search   Clear

⟲ Reset Search   ↺ Search History

If you want to clear all the search criteria, you may select "Reset Search." This will clear all fields and allow you to perform a new patient search.

5.11 Search History

You can view previous searches made by Patient Search Users in your Facility during the previous 36 hours by clicking the "Search History" link next to the Patient Search bar.

Patient Search

↺ Search History

For best results, please provide all available information. *fields are required.

Last Name *	First Name *	Middle Name	Date of Birth *	Gender *
✕			MM / DD / YYYY	

Address	City	State	Zip Code	Phone

Search Patient

On the Search History page, you can search for patients that have already been retrieved by users associated with your ACF by entering the patient's name in the search bar. Please note, this information is cached at a default duration of 36 hours, so the Search History will not display any search conducted outside that timeframe.

Search History   🔍 Patient Search

Enter patient information

🔍 te   ✕

Patient Name ↕	Date of Birth ↕	Gender ↕	Address ↕	Phone ↕	Last Accessed ↕
noname, testerson	01/01/1960	Male			11/08/2022 2:10 pm
test, testerson	11/11/2011	Female			11/08/2022 2:09 pm
dallesandro, baxter	07/21/2010	Male			11/08/2022 2:08 pm

Selecting "Back to Patient Search" at the top right of the screen will return you to the full Patient Search page.

Search History   ← Back to Search

Enter patient information

🔍 ch   ✕

Patient Name ↕	Date of Birth ↕	Gender ↕	Address ↕	Phone ↕	Last Accessed ↕
CHDRZZZTESTPATIENT, CHDRONE	03/03/1960	Male	1234 Howard St. , La Jolla, CA 92038		12/02/2022 10:16 am

6 Data Sources

6.1 National Health Information Networks

Patient Search connects to National Health Information Networks. Through Patient Search, public health and health care practitioners can send a query for "Message Content for Treatment," and participating organizations respond to the query with relevant patient documents which may include health information such as medications, allergies, diagnoses, and lab results.

PointClickCare participates in the eHealth Exchange as a Hub Initiator, meaning that Patient Search can send queries to other participants on the network, but it does not respond to queries. Simply put, Patient Search "pulls" information from the eHealth Exchange, but does not "push" information. Through eHealth Exchange, networks including Carequality and CommonWell can also be queried.

Patient Search can be configured to query different source organizations on the National Health Information Networks depending on your emergency response needs. Source organizations may be located in your state, or may be entities with national coverage.

Patient Search is also connected to Surescripts, a nationwide network that facilitates electronic transmission of medication information between electronic health record vendors, pharmacy benefit managers, major pharmacies, and clinicians. Patient Search Users query Surescripts for patient medication information from the past 12 months.

6.2 Surescripts

PointClickCare has partnered with Surescripts, the nation's leading health information network, to allow emergency responders to provide the best medical care possible during disasters. Seamless integration of the Medication History solution from Surescripts enables emergency response personnel working in non-routine care settings to view patients' consolidated medication history during declared emergencies, alongside other clinical documents. Medication History gives healthcare providers essential information to continue patient access to routine medications for chronic disease management and reduces the likelihood of medical errors or interruptions in medication adherence, with data coverage across the U.S. Surescripts' nationwide health information network is connected to 80 percent of pharmacies in the U.S., and includes data on 314 million patients representing 98 percent of the U.S. population. The dispensed information displayed in Patient Search covers the past 12 months of data sourced from pharmacy benefit manager claims and pharmacy fill data. The data includes prescriptions that were paid for (if applicable) and received by the customer.

7   Appendix A: TERMS OF USE (for individual Authorized Users)

Terms of Use (ToU) are hosted on the user interface (UI). End users must agree to the ToU upon logging into the UI. ToU are subject to update, and users must agree to them each time they are updated.