Online Guide to CEHR

Introduction

CEHR by PCE Systems is a patient portal that allows healthcare providers to communicate and share information with the persons they serve. This guide is designed to help you understand the features of CEHR and what information you can view or receive from your provider.

CEHR is free, easy to use, confidential and available wherever you have Internet access.

You and your authorized representative may setup a CEHR account to access your own health information. Your CEHR may have some or all of the following:

➤ Check on your lab results
➤ View appointments
➤ Send messages to your healthcare provider
➤ Sign documents
➤ Fill out forms
➤ Download or email your health data to another provider

To access CEHR, go to **www.mycehr.com** from any web browser on your computer or mobile device. First time logging in? Please contact staff to receive instructions.

If you have any questions or need help with CEHR please contact your healthcare provider.
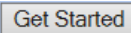
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Accessing Your Electronic Health Record

How to Create a New Account in CEHR

➤ Ask your Healthcare provider for Printed Instructions, which includes the web address for the Patient Portal, your Case Number, and a unique PIN that you'll use when registering your account

➤ The name of the Patient Portal is CEHR, or "Share" for short. This is a website that you can access from any web browser using an Internet connection. The Printed Instructions that you receive from your Healthcare provider includes the website address.

➤ Once you are on the website for CEHR, click [Get Started]

Not a Member Yet?

Create an account and get started!

[Get Started]
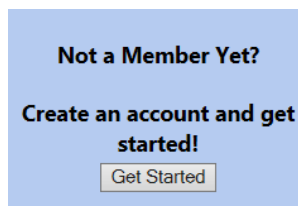
➤ A form will appear on the screen that you will need to complete to setup your account.

➤ Complete the form. You will need the information that is on the Printed Instructions (your Case Number and PIN) as well as an Email Address. If you are the Parent or Guardian of the person served, make sure you use their Date of Birth and check the box that you are the Parent or Guardian.

Please complete the information below to create a new account

Account Information

Your Name: [First] [Last]

Create a User Name:* [ ] (Example: JohnDoe24)

E-Mail:* [ ] (Example: example1234@somemail.com)

Patient's Date of Birth:* [ ]

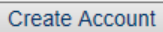☐ Check here if you are parent or guardian of the patient

Password:* [ ]
Confirm Password:* [ ]

Health Facility Information
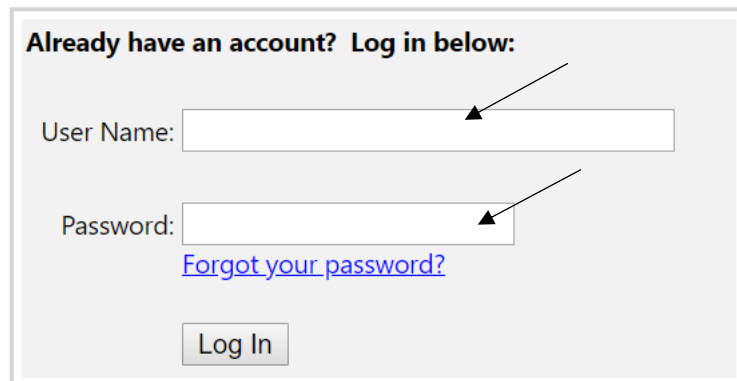This information must be provided to you by your health facility

Case Number:* [ ]
PIN:* [ ]

[Create Account] [Cancel]

➤ Once the form is complete click [Create Account]

➤ You will then see a list of things to read and agree with in order to use your electronic health record. For example, you will need to agree to not using your electronic health record for urgent situations – always call 9-1-1 for emergencies.

➤ If you have questions about what is on the screen, please talk to your Healthcare provider.

➤ Once you click Accept you will be on the Home Screen for the CEHR patient portal.

How to Login and Use the Portal

➤ Once you have an account with CEHR, from the login screen, enter your User Name and Password that you created when you set up your new account.
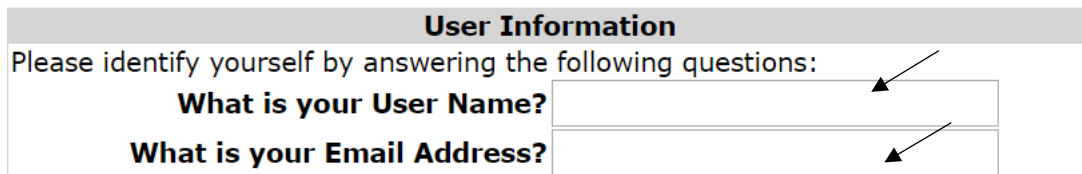
Already have an account? Log in below:

User Name: [   ]

Password: [   ]

Forgot your password?

[Log In]

➤ If you can't remember your password, click the link on the login screen: Forgot your password?
➤ Enter your User Name and your Email Address, then click Reset my Password.

User Information
Please identify yourself by answering the following questions:

What is your User Name? [   ]
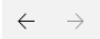**What is your Email Address?** [   ]

[Reset my Password] [Cancel]

➤ Open your email and locate the message that was sent to you from CEHR that includes a temporary password. Login with this password. You will be prompted to create a new password.
➤ The left side of your screen has the main parts of your health record. You can click on these titles to go to that page of your record.
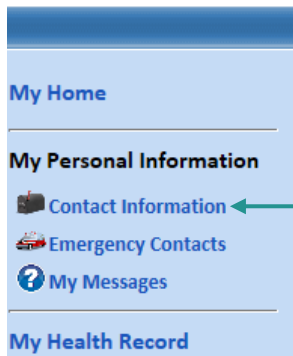
Make a choice by clicking on any of these titles

> When you click on a title, a screen will open with information
> The information within CEHR is view-only, so feel free to browse and review your information
> There are four important navigation "buttons" at the top of the screen

- **help** - Click this button to get answers to questions on how to use CEHR
- **home** - Click this button to take you to the main home screen
- **X logout** - This button ends your session. When you are done or you leave your computer, you should ALWAYS click this button to logout. By logging out, you keep your information private and protected.
- **← →** - At the top left corner of the screen is an arrow pointing left. Click on it to go back one screen.

> Your health agency or healthcare provider is the one who will keep your health record current. In some cases, you can make changes to CEHR, for example to change your email address. If you do make any changes, please use the Save keys that you see on the screen. The navigation buttons, such as **home** and **← →** do not save your information.

> 🗓 - this picture of a calendar can be used to find a date quickly

> * - this means that you must enter something in this field

> Whenever you leave your computer, <u>always</u> click **X logout**.

> As a security measure, the system contains an automatic time-out/log off after a period of time when there is no activity.

➤ At the bottom right of your screen, you will see the timer for the period of no activity. This indicates how long you have until you will be logged out, but the clock resets when you are clicking around the system and using it.
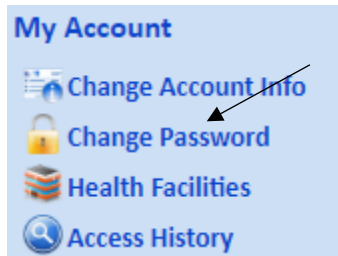
Privacy and Terms of Use
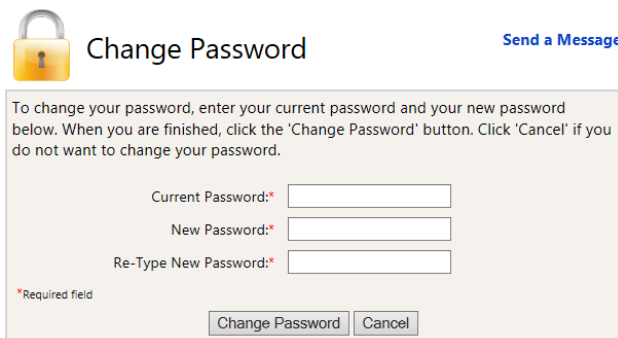TIME-OUT IN: 29 Minutes, 6 Seconds

How to Create a Password

At times you will need to create a new password to keep your information secure.

➤ Under My Account, click on Change Password

My Account
- Change Account Info
- Change Password
- Health Facilities
- Access History

➤ Follow the instructions to enter your current password and create a new password.

Change Password   **Send a Message**

To change your password, enter your current password and your new password below. When you are finished, click the 'Change Password' button. Click 'Cancel' if you do not want to change your password.

Current Password:* [   ]
New Password:* [   ]
Re-Type New Password:* [   ]

*Required field

[Change Password] [Cancel]

➤ Now it's time to think about your new password… please follow these rules:

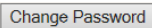|	
DO select a password that contains at least 8 characters. A character can be a letter, number, or symbol. NO SPACES! ☺	**DON'T** use a password that is less than 8 characters.
DO include letters and numbers in your password.	**DON'T** use any identifying information (i.e. your name, birth date, login ID, etc.)
DO memorize your password. Choose a password that is easy for you to remember.	**DON'T** use all the same characters, i.e. 11111111 or aaaaaaaa

➤ Passwords are exact so if you use a capital letter, it must always be used when entering your password.

➤ Be sure to save this by clicking the [Change Password] button

Note: Every 180 days you will have to change your password to help keep your record safe
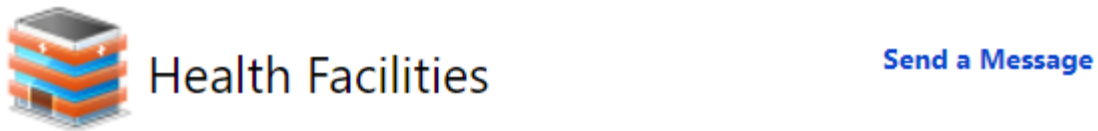
How to Update Your CEHR "PIN"

Your PIN is used to register a new account in CEHR and is included on the Printed Instructions. If you feel someone may have learned your Personal Identification Number (PIN), you will want to request your Healthcare provider to generate a new PIN. Once your Healthcare provider has changed it and printed new instructions, you will want to log in to CEHR to complete these steps:

➤ You will see this message at the Main Menu. Your health data within CEHR will not appear until the new PIN is entered.

➤ Click on in the bottom left corner and click Update PIN

➤ Enter your new PIN and your birthdate in this format: MM/DD/YYYY and then SAVE
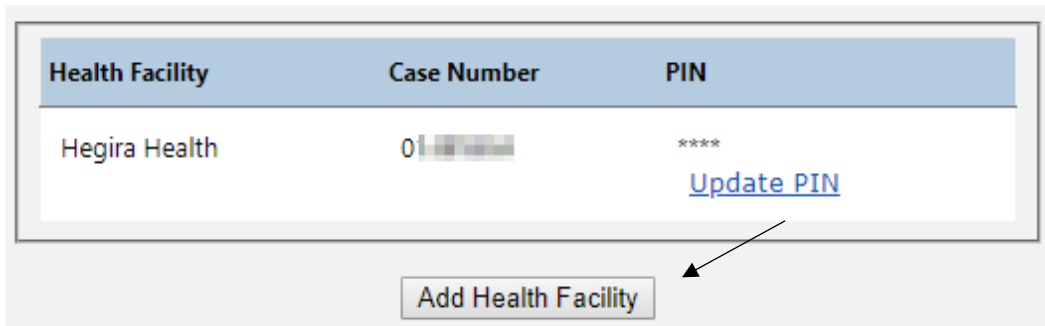
How to Add a Health Facility to Your Portal

If you receive services from more than one healthcare agency that use PCE Systems, you can link those records together in CEHR so you can view information for both agencies.

Once you have an account in CEHR with the first healthcare agency, you can add the second agency under Health Facilities. Please ask your Healthcare provider for the Printed Instructions, as this will include some information that you need to enter to set up the second account.

There is not a limit to the number of Health Facilities you can add, but they must use PCE Systems.

➤ From the Main Menu, click **Health Facilities**

Health Facility	Case Number	PIN
Hegira Health	0███████	****
		Update PIN

Add Health Facility

➤ Click **Add Health Facility**
➤ Using the Printed Instructions from the second agency, enter your Case Number, the PIN and your birthdate in this format: MM/DD/YYYY and then **SAVE**

Reviewing Your Health Information

*Here is a quick summary of the popular areas of the portal*

My Home

My Personal Information
- Contact Information
- Emergency Contacts
- My Messages

My Health Record
- Allergies
- Continuity of Care
- Diagnosis
- Documents
- Lab Test Results
- Medications
- Vitals

My Appointments

Upload Documentation
- Fill Out Forms

Resources

My Account
- Change Account Info
- Change Password
- Health Facilities
- Access History

My Personal Information – view your contact information and the emergency contacts that we have for you on file. Contact staff if this information needs to be updated.
My Messages – send an electronic message to your agency and receive one back. If you get a new message from your agency, you will receive an email to let you know that you have a message.

My Health Record – view information about your health; you can see your allergies, your diagnosis, the medications you are taking, details about those medications, blood pressure, weight and other vitals. When tests are done at a laboratory those results can be seen here.
Continuity of Care – you can download a file of your basic healthcare information and send it privately and safely to other healthcare providers.
Documents – view documents that your agency has sent to you so you can keep a copy or so you can electronically sign documents waiting for your signature.

My Appointments – view future appointments. Contact staff if you need to cancel or schedule a new appointment.

Upload Documentation – upload your own health information and send it to your health provider
Fill Out Forms – complete a form within CEHR and automatically send it to your provider.

Resources – click here to find helpful information from your agency

How to Send a Message

If you wish to inform your healthcare provider/health provider about something, you can click the Send a Message link on any page.

A pop-up box will appear to write a note to staff. Select the person that you want to send the message to, type your note, and then click Send.

How to See if You Received any Messages

➤ When Staff reply to your message or send a new message, you will receive an Email to let you know that you have a message in CEHR to review.

➤ Once you login to CEHR, from the Main Menu, click My Messages

> You will see a list of all the messages that you have sent or received. Click Reply if needed.

How to See Your Allergies

> From the Main Menu, click **Allergies** and the following screen will appear:
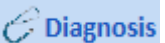
How to See Your Current Diagnosis

> From the Main Menu, click **Diagnosis** and the following screen will appear:
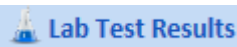
Diagnosis

Send a Message

Your current diagnosis information is listed below:

Diagnosis Code: F0633

Bipolar and related disorder due to another medical condition; With manic- or hypomanic-like episodes

How to See Your Lab Test Results

➤ From the Main Menu, click **Lab Test Results** and the following screen will appear:

Lab Test Results
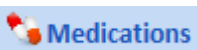
Send a Message

Your lab test results are listed below with the date they were reported. Note that this list may not include all test results received by your health provider:

COMPREHENSIVE METABOLIC
Nov 30, 2015

Test Ordered By
R

Test Performed By

ALBUMIN
Result: 4.5 G/DL   Abnormal Flag: N

ALK PHOS
Result: 88 U/L   Abnormal Flag: N

How to See Your Current Medications

➤ From the Main Menu, click **Medications** and the following screen will appear:

Medications

Send a Message

Your current medications are listed below:

Abilify - 10 mg
Take 10 mg Once per day
Medication Details

Fluphenazine Decanoate -
Take 25mg intramuscular Once a Week
Medication Details

➤ Medication Details – click this link to view more information about the medication. A window will open to CareNotes® and you can click the Language and view information about that

medication. Close this window using the Log Out button or X in the top right corner. This will *not* log you out of the portal.

How to See Your Vital Signs

➤ From the Main Menu, click ♥ Vitals and the following screen will appear:

How to See Your Upcoming Appointments

➤ From the Main Menu, click on the link My Appointments and the following screen will appear:

How to View Resources

Your agency can make helpful resources available to you within CEHR. Follow the steps below to see the information:

➤ From the Main menu, click on **Resources** and the following screen will appear:

➤ Click on one of the items that interests you.
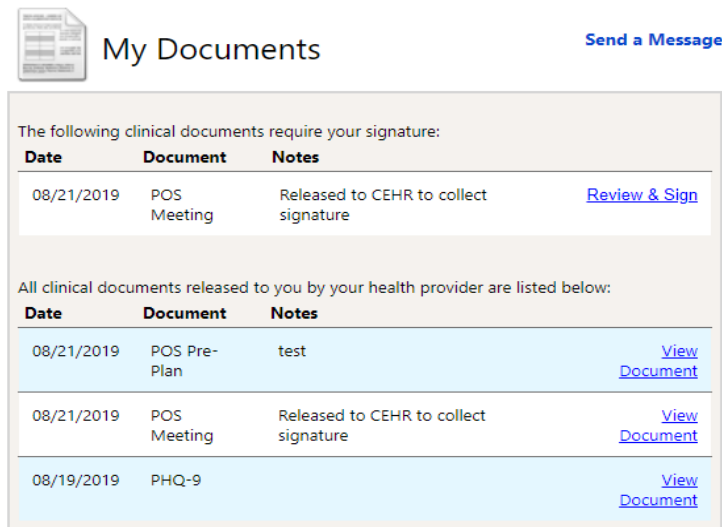
➤ The information will appear in a pop-up window.

➤ When you are finished looking at the information, click 'X' in the upper right corner to close the window.

Reviewing Your Documents

How to View and Sign Documents Sent by Your Health Provider

➤ You will receive an email if a document has been sent to CEHR

➤ From the Main Menu, click [Documents] and the following screen will appear:
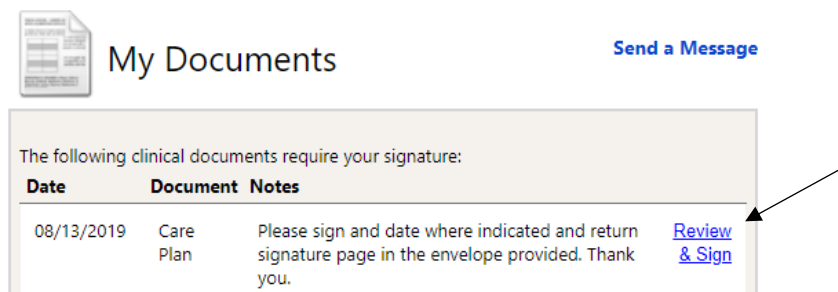
➤ You will see a Review & Sign if the document needs your signature. Click the link to sign the document

➤ The document displays as a PDF that you can scroll through to review.

> Once the document has been reviewed, scroll to the bottom of the page and enter their CEHR password and click Sign.
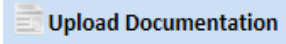
> The document is removed from the list of documents to sign but remains on the screen for future viewing.

How to Add Information into Your Record and Send to a Health Provider

If you want to send a document to your health provider from your computer or from a website, follow these steps:

> From the Main Menu, click **Upload Documentation** and the following screen will display:

Upload Documentation

Send a Message

Upload a file or document to your health provider by clicking the 'Start New File Upload' button **OR** you may give a URL (Uniform Resource Locator) to a website that contains your health documents for your provider to access by clicking the 'Start New URL Upload' button.

Note: Documents uploaded this way will NOT show up in 'Documents' section of CEHR

Start New File Upload   Start New URL Upload
Cancel

➤ To upload a file from your computer, click Start New File Upload
➤ Select the Type, enter a Title and a Note about the document

Upload Documentation

Send a Message

Enter the necessary information and select the file from your computer. Once you have finalized the upload, you may click the 'Send Uploaded Document/URL' button to electronically send the file to your health provider. **Only files of type csv, xls, xlsx, doc, docx, pdf, tiff, png, jpg, jpeg, or txt are accepted.**
If at any time you wish to cancel, click the 'Cancel' button to return back to your home page.

Type:* [* Select Type ⌄]

Title:* [   ]

Notes:* [   ]

➤ Click Browse... and find the document on your computer

Select a file to upload
Click the Browse button to select the file on your local PC to be uploaded. Then click the 'Upload' button.
I. Select a file to upload from your local PC by clicking "Browse".
Files to be uploaded cannot exceed 30MB. Try compressing (ZIP) large files.
[Browse...]

II.Click "Upload" to begin uploading the file you've selected. This may take several minutes depending on the file size.
[Upload]

➤ Click Upload
➤ Click Finalize Upload

➤ Click [Send Uploaded Document/URL] . ("URL" means a website address and is used in the next example)

➤ In addition to documents, you can send a link to a web address to your health care provider. This should be used to share your personal health reports or data from online sources. Examples could be a fitness monitoring device/app or in-home health data tracking device so this information can be included in your health record.

➤ To upload a link to a web address, click [Start New URL Upload]

➤ Select the Type, enter a Title, enter the web address into the URL field, and enter a Note about the document

Upload Documentation   **Send a Message**

Enter a web URL (Uniform Resource Locator) or web address for a website that contains your health documents for your provider to access. Please provide instructions in the Notes field on how to navigate the website to locate your documents.
If at any time you wish to cancel, click the 'Cancel' button to return back to your home page.

Type:*   [* Select Type ▽]
Title:* [   ]
URL:*   [   ]

Notes:* [   ]

*Required field

[Send Uploaded Document/URL] [Cancel]

• Click [Send Uploaded Document/URL]

• The document or URL is now available to your health care provider to review in their system.

How to Fill Out Forms

You may receive a questionnaire or form from your health provider that they would like you to complete and return to them. To do so, follow these steps:

➤ From the Main Menu, click [📄 **Fill Out Forms**]

Fill Out Forms   **Send a Message**

This page contains forms that you may fill out and submit to your health provider. Click on one of the forms below to begin.

PHQ-9
Patient Health Questionnaire

➤ You will see blue links to the forms that your health care provider has made available in the portal.

➤ Click on the blue link of the form you wish to complete.

➤ Fill out the form and click Submit

➤ The form is now available to your health care provider to review in their system.

Sharing Your Information with Other Healthcare Providers

How to Share Your Health Data

You are able to download or send a Continuity of Care Document, or CCD, from within your patient portal. This document includes a summary of information that can be viewed or shared with other healthcare providers.

Example health data that is included in the CCD:

- Smoking Status
- Allergies
- Medications
- Diagnoses
- Vital Signs
- Lab Results
- Immunizations

The purpose of the CCD is to share with your other healthcare providers so they can incorporate it into their system and better understand your healthcare status.

➤ From the Main Menu, click ⤤ Continuity of Care

➤ Click View My Continuity of Care Document (HTML)

A Continuity of Care Document (CCD) is a file which contains your current personal and health information. It can be given to your other health care providers.

To **View** your CCD, click the link below:
View My Continuity of Care Document (HTML)

➤ A window will open and display your CCD. Review the information and determine if this would be helpful to share with your other healthcare providers.

➤ If you would like to download your CCD, you can choose to download an HTML or XML version. Both formats can be saved to your computer.

- The HTML version looks like a webpage and is the "human readable" version.

– The XML version is a format that can be imported into an Electronic Health Record. This is the format you would want to use if you decide to send the CCD to other healthcare providers who use an electronic record.

A Continuity of Care Document (CCD) is a file which contains your current personal and health information. It can be given to your other health care providers.

To **View** your CCD, click the link below:
  View My Continuity of Care Document (HTML)

To **Download** your CCD, click the link below:
  Download My Continuity of Care Document (HTML)

To **Download** an "XML" version of your CCD, which has codes and is used by computers, click the link below:
  Download My Continuity of Care Document (XML)

➤ Instead of downloading, you also have the option of emailing the CCD right from the portal directly to your other healthcare provider.

➤ You can choose to send via email and just type the email address of a staff person who works at the other healthcare provider's office, or you can send it using a "Direct" email address.

– Send CCD via Email should be used to enter an email address that was given to you by the healthcare provider. You could also send it to yourself as a test to see what they would see. Sending via Email will include both the HTML and XML versions.

– Send CCD via Secure Email is used when you have what's called a "Direct Email Address". "Direct" is a special secure email that some healthcare providers have to send health information back and forth using encryption.

– If you are unsure which email method to use, call your Healthcare Provider's office to see if they have a Direct Email Address or a basic email that you could use to share your CCD. Just let them know you are trying to share a CCD that includes your health data and they can guide you on where to send it.

To **Email** a copy of your CCD to a different health care provider, click the link below and then provide an email address:
  Send CCD Via Email

If you have a special Direct email* address, you may **Securely Email** a copy of your CCD to a different health care provider. Click the link below and then provide a Direct email address.

  Send CCD Via Secure Email

*A Direct email address is a special secure email address given to you by your health care provider. When using a direct email address, your CCD will be sent securely and encrypted. Ask your health care provider if you are unsure about using Direct/secure email.

➤ Reminder! Always be sure to click **X logout** when you are finished.