LINK2CHOP

Children's Hospital of Philadelphia®

QUICK START GUIDE

Epic

Important Telephone Numbers

1-800-Try-CHOP

(1-800-879-2467)

Table of Contents

Link2CHOP Privacy

Allowable Use of Link2CHOP

CHOP takes the privacy and security of a patient's medical information very seriously.

Use of Link2CHOP is conditioned on the user's compliance with CHOP's Policies and Procedures and with all federal and state law regarding the privacy and security of patient information such as HIPAA.

A user is only allowed to access an individual patient's information in Link2CHOP when there is a physician-patient relationship resulting in the need to access the patient's information in order to treat the patient.

Access to information in Link2CHOP is permitted only by users at the Practice who have Link2CHOP credentials.

Prohibited Use of Link2CHOP

Viewing information of any patient in Link2CHOP for a purpose unrelated to treatment of the patient by the practice including, but not limited to:

- The purpose of personal curiosity or medical research.
- Viewing information of a patient who is a family member, relative, neighbor, co-worker, friend, celebrity or any other individual not treated by the Practice.
- Allow a contractor or agent of the practice to access Link2CHOP without the express written agreement of CHOP.
- Compile and/or distribute analyses to third parties utilizing any data, including de-identified data without the express written agreement of CHOP.
- Use or disclose information in Link2CHOP in any manner that would constitute a violation of federal or state law.

Role of Site Privacy Officer

Assist CHOP in confirming that a treatment relationship exists between the practice and patient for records viewed via Search All Patients (aka: First Access).

Assist CHOP in investigating any potential unauthorized access or disclosure of PHI obtained from Link2CHOP portal by practice staff.

Ensure the practice takes appropriate disciplinary and corrective action as required by HIPAA if staff at practice access or disclose information obtained from Link2CHOP for a purpose unrelated to the patient's treatment by the practice.

Ensure all staff given access to Link2CHOP have received HIPAA privacy and security training from the practice regarding their responsibilities and the practices policies and any training required by CHOP.

Where appropriate, coordinate with CHOP in providing written notification to patients in the event of a data breach involving Link2CHOP portal data and practice staff.

Getting Started

Link2CHOP is a tool that provides real-time Web access to patient information, so you can access patients' clinical data and communicate with CHOP to provide quality patient care.

Link2CHOP is comprised of different Web pages, or activities, that correspond to different tasks. The *activity* that you use depends on what you want to accomplish. For example, if you want to see detailed information about a patient's lab results, you can use the Results Review activity.

This guide takes you on an introductory tour of Link2CHOP. The first few pages include information to help you get started, such as browser requirements and how to log in. The rest of the guide contains explanations of how to use Link2CHOP. Terms that appear in *italics* throughout the guide are further defined in the glossary at the end of the guide.

Help and contact information

For help using an activity, click ? on the Web page.

If you have issues logging in - please call the Help Desk at 215-590-HELP.

Browser, system, and connection requirements

You must use one of the following Internet browsers to access Link2CHOP:

- Apple Safari
- Google Chrome
- Microsoft Internet Explorer 8.0 or above
- Mozilla Firefox 10 and any later versions

Please note the Internet browser requirements:

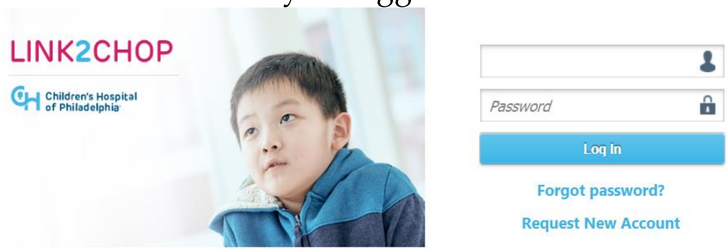
- Google Chrome version 118 or later. Previously, version 106 or later was supported.
- Microsoft Edge version 118 or later. Previously, version 106 or later was supported.
- Mozilla Firefox version 115 or later. Previously, version 102 or later was supported.
- Safari version 17 or later. Previously, version 15 or later was supported.

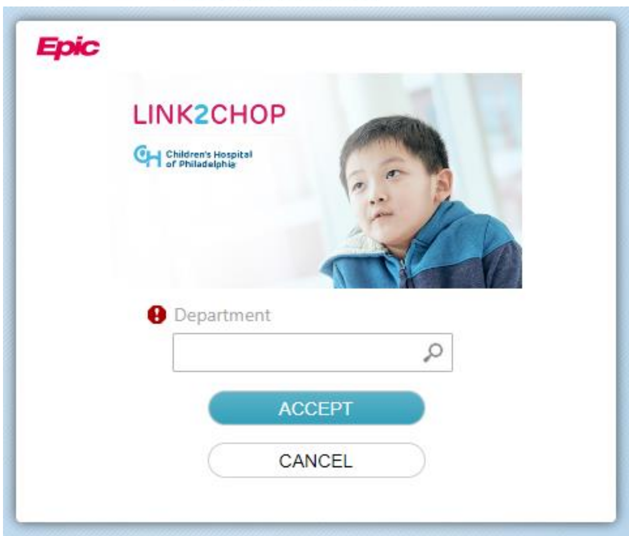
Link2CHOP requires a minimum screen resolution of 1024x768 pixels. While you can use a dial-up Internet connection to access Link2CHOP, we recommend that you use a high-speed Internet connection to achieve the best system speed and performance. In addition, you need Java enabled to display graphs and scanned images in Link2CHOP.

How do I log in?

Open your Web browser and access the following URL: link2chop.chop.edu

You should automatically be logged in via Azure SSO.





Select the correct login department and click "Accept".

You are now logged in to Link2CHOP.

* **IMPORTANT**: Your account will be disabled after 180 days of inactivity. Please call 215-590-HELP to reactivate your account.

Navigating in Link2CHOP

When you log in to Link2CHOP, two sets of navigation tools appear at the top of the page.

- **Action Options**: These buttons allow you to perform basic tasks, such as selecting a patient or logging out.

Navigation Tabs: These tabs allow you to navigate to different activities in Link2CHOP.

Most activities are located under the Patient tab. When you mouse over Patient, a menu appears with activities that you can select.

Link2CHOP Home Page

The Link2CHOP Home Page is the first screen you will access when logging into Link2CHOP. In addition to the Event Monitor that displays on this page, updates, documentation and hyperlinks to access the CHOP intranet are available for easy reference.

In the News…

The In the News section provides updates on new features available in Link2CHOP and general announcements. Please refer to In the News to obtain updates relating to Link2CHOP.

Quick Links

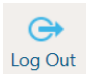
Quick Links provide a one-click solution for accessing external websites or finding training documentation.

The following information is available via Quick Links:

- Online Training Modules – Provides access to online training modules relating to Link2CHOP. The following training modules are currently available:
  - ✓ Login and Navigation
  - ✓ Order Entry
  - ✓ Create a Patient
- Tip Sheets – Provides training documentation relating to Link2CHOP.
- External Websites – Easy access to CHOP's internet sites.
- Consent Form – Copy of the HIE Authorization form. (See Health Information Exchange Authorization for additional information.

How do I log out?

To maintain patient confidentiality, you need to log out or *secure screen* when you are done working or have to leave the computer for any reason. There are two ways to do this:

- Click 

Log Out to log out of Link2CHOP. The next time you log in, you are directed to your start page.

Password Reset

If you need to reset your Link2CHOP password - please call the Help Desk at 215-590-HELP and a ticket will be created on your behalf .

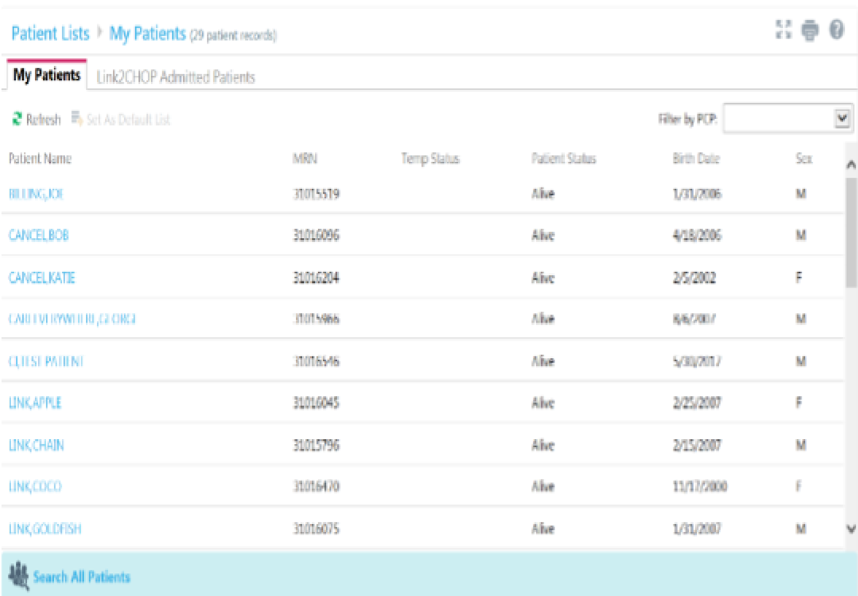
Accessing the Patient Chart

There are two ways to access a patient's chart: by selecting the patient from a list of your current patients or by searching for your patient based on name, date of birth, or other criteria. Both methods are described below.

Select your patient's chart from a list of current patients

If you have access to only a few patients, selecting your patient from a list is quicker than searching for them.

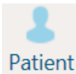
1. Select the Pt Lists tab. Use the tabs at the top of the activity to select the patient list you want to view.
2. Click a patient's name to open their chart.



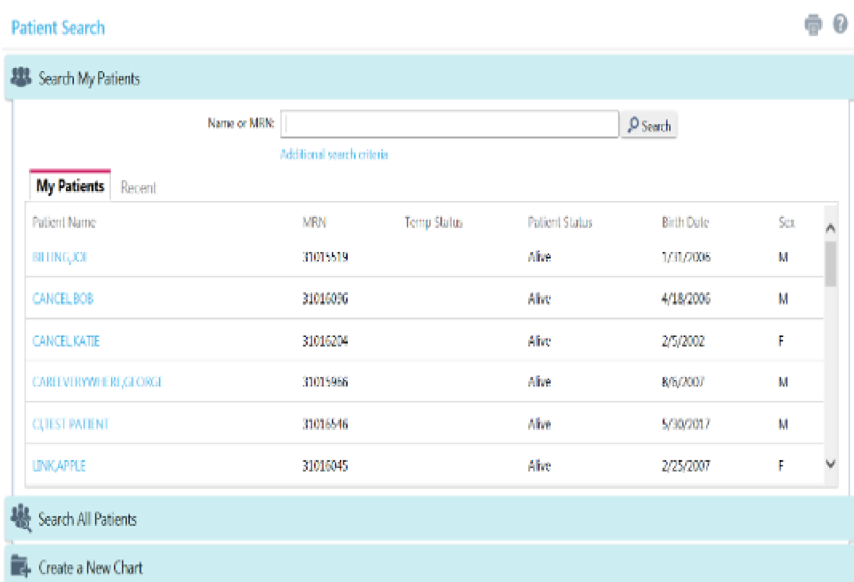
> **TIP:** To see only the patients for whom you are the PCP, select your name in the **Filter by PCP** field.

Search for a patient's record based on name or MRN

If you know specific information about a patient, such as his name or MRN, you can use Patient Lookup to enter the information and then select the appropriate patient from the list of possible matches.

1. Click 

 Patient. The Patient Search activity opens.
2. Enter the name of the patient in the *Name or MRN* field.
3. Press Enter to select the patient's name from the drop-down list of potential matches.
4. In the Search Results window, click the name of the patient whose chart you want to open.



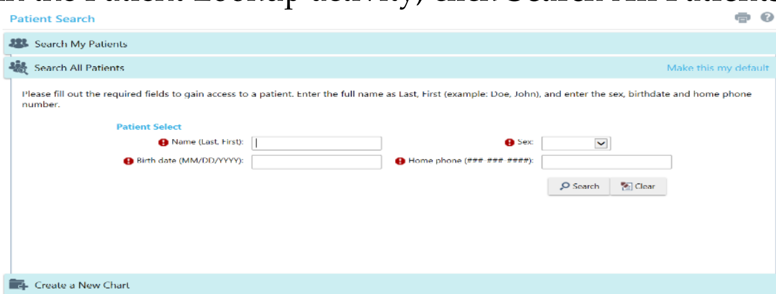
TIP: In two clicks, you can quickly open a patient chart that you recently had open. In the Patient Lookup activity, select the Recent Patients tab and then click the name of the patient from the list.

What if I can't find a patient?

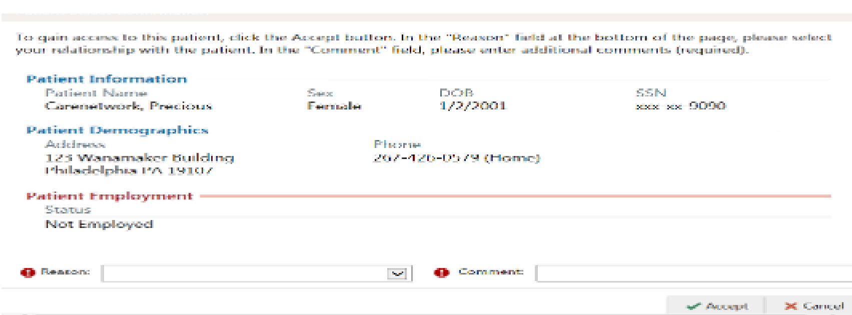
If you do not find a patient using the methods above, you might be able to search for the patient's chart by entering more identifying information about the patient. Use this tool when you need to gain immediate access to a patient's chart for the first time.

	You must enter the patient's <u>full</u> name when using this method.

1. In the Patient Lookup activity, click **Search All Patients**.



2. Complete all of the *required fields*, and then click **Search**. The Search Results page appears.
3. Select the patient record you want to review. The Patient Select Confirmation screen displays.
4. Select the reason you need access to the patient's chart in the **Reason** field. Enter additional information in the **Comment** field. Click **Accept**.



Patient-Provider Relationship for Link2CHOP users

To have access to CHOP patient information as a Community Physician, you must be a Primary Care Provider, Admitting, Attending, Referring Provider, or otherwise be part of the patient's Care Team. The Care Team being a group of health care workers and support staff, who are members of different disciplines, each providing specific services to the patient.

If you are the Primary Care Provider, access to your patients will never expire. If you are an Admitting, Attending, or Referring Provider, or a member of the patient's Care Team, access will expire after 180 days. Patient-Provider Relationships are created when a patient is registered at CHOP. In the event that this information is unknown or incorrect, CHOP will allow you to access a patient's record for 10 days by using the 'Search All Patients' functionality. All 'Search All Patients' requests are reviewed, and when deemed appropriate, the length of access is updated accordingly.

> The Search All Patient functionality is taking place of the functionality formerly known as First Access.

Health Information Exchange Authorization

CHOP is required to obtain a patient's and/or parent's signature, authorizing the release of electronic medical information. If you attempt to view a patient's chart, and are presented with the following message, an authorization is not on file.

Care Filter Report

We are sorry, you cannot access this record at this time because we do not have a signed consent form from the patient/parent/guardian to provide caregivers electronic access to medical records. There are several reasons that you might be getting this message:

1. We do not have a signed consent form from this patient to authorize the release of electronic medical records. This could happen in the event that the patient, parent or guardian was not available to provide consent, we are in the process of getting consent, or we have not yet had the opportunity to get consent from this patient.

2. Your patient has declined consent to give access to their electronic medical record.

You can download the consent form by clicking the link below. Have the patient/parent/guardian sign the form and fax, along with a cover sheet, to 844-FAX-CHOP (844-329-2467). Access to patient information will be available within 72 hours of receipt.

Links

1. Authorization Form

If you need access to this information sooner than the above process allows, please contact the division or the department directly, or call 1-800-Try-CHOP (1-800-879-2467), Option #2.

A link to a PDF version of the Authorization Form can be downloaded directly from the Care Filter Report page. The table below provides details on the required signatures:

Patient Age	Signature Requirements
Age 0 – 12	Parent Signature Only
Age 13 – 17	Both Parent and Patient Signatures
Age 18 & Above	Patient Signature Only

Fax the completed form to 844-FAX-CHOP (844-329-2467). Allow up to 72 hours for access to be given.

For immediate access, contact the division or department directly, or call 1-800-Try-CHOP (1-800-879-2467), Option #2.

Referral orders can be entered without an HIE Authorization being on file. See the Placing Orders section for additional information.

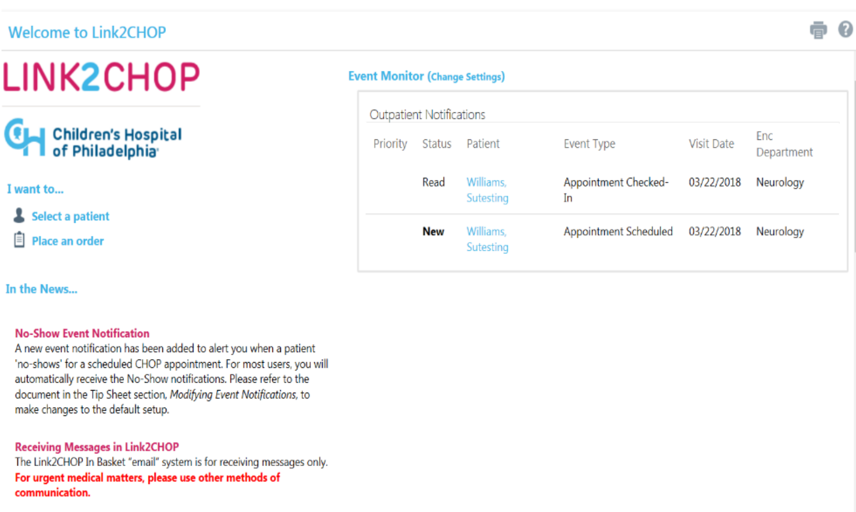
Monitoring Your Patients

Event Monitor allows you to monitor *events* that occur in your patients' care, such as inpatient admissions or discharges, completion of outpatient visits, or new lab results. You can view these events on the Welcome page in the Event Dashboard or in your In Basket.

View recent events that have occurred in the care of your patients

Select the Home tab. The Event Dashboard appears in the middle of the page, showing recent events for your patients.

If necessary, you can view more information about events by clicking the name of the patient in the Patient column. This takes you to In Basket, where you can view additional information about the event and mark it as Done if you are finished reviewing it.

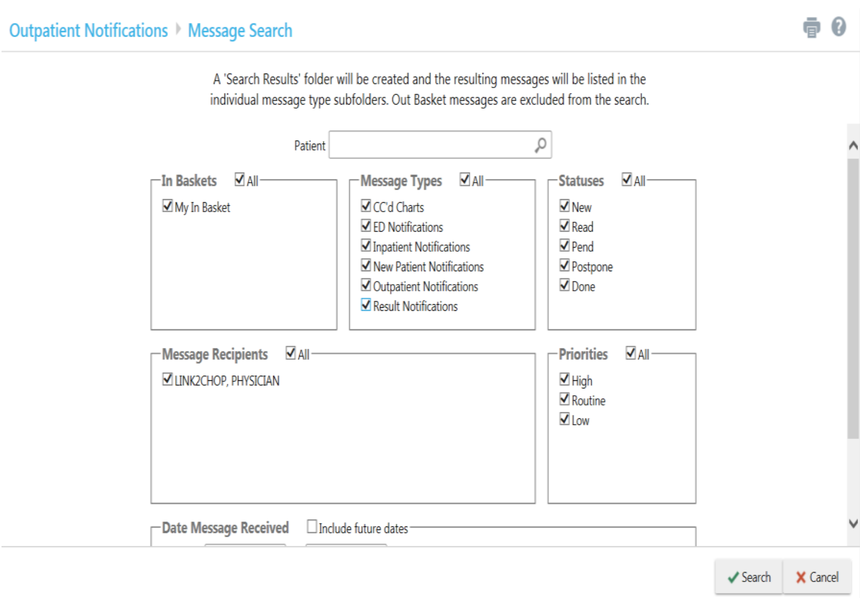


Select a patient's chart from an event message

Select the In Basket message for the patient's event and click **Select Patient** to access the patient chart.

Search for specific patient events

1. Select the In Basket tab, and then click **Search** in the toolbar.
2. In the Message Types section, select the types of event notifications for which you want to search.
3. In the other sections, select the other criteria for your search, such as the message status or priority, and click **Search**.

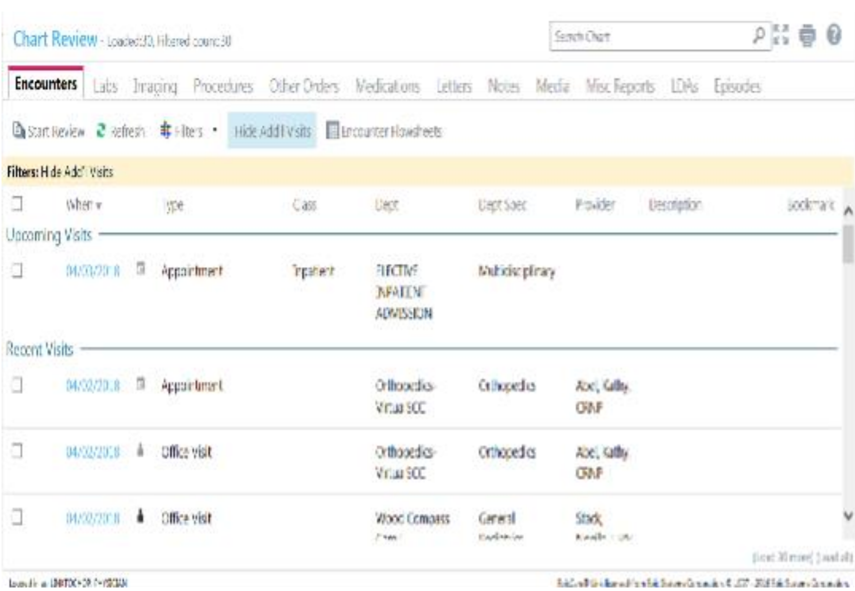


Reviewing the Patient Chart

Review your patient's chart before the visit

1. Access the patient's chart from your Patient List or by searching using the Patient icon. The *Patient Snapshot* opens.
2. Select the *Chart Review* activity.
3. At the top of the page, click the tab that contains the information you want to see. For example, if you want to view information about the patient's visits, click the *Encounters* tab.
4. To view more details on a row of information, such as a specific patient visit, click the *date hyperlink* that appears in the row. The Report Viewer page opens.

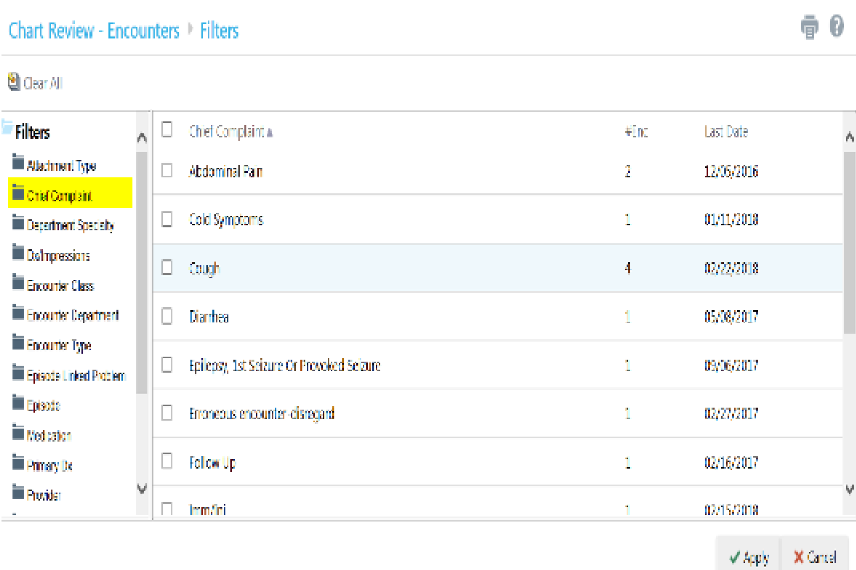
> **TIP:** To view details on several rows at once, click the check boxes in those rows and then click **Start Review.**



Find information quickly in the patient's chart

For patients with large charts, it can be helpful to narrow down the list of visits, labs, medications or other information in Chart Review. For example, on the Encounters tab, you can filter the list so you see only the visits associated with certain providers.

1. In Chart Review, select the tab that contains the information you want to see (for example, Encounters or Labs).
2. Click **Filters**. The Filters page opens.
3. Select the check boxes next to the values that you want to see. For example, choose a specific *specialty* or *provider*.
4. Click **Apply**. The results of your search appear.
5. To remove the search criteria and begin a new search, click **Clear All**.



Data Available via Care Everywhere

The Care Everywhere activity is a read-only activity that allows you to view data obtained from a non-CHOP organization.

1. In Clinical Review, select the Care Everywhere activity. The *Care Everywhere Outside Records* screen will open.

2. The Care Everywhere Activity lists each document that has been received from an outside organization.

    ▪ A mortar and pestle icon in the M column indicates that medications were ordered or discontinued during this visit.

    ▪ A test tube icon in the L column indicates that lab tests were ordered or resulted during this visit.

    ▪ An x-ray icon in the I column indicates that imaging or EKG orders were ordered or resulted during this visit. Note: Care Everywhere does not send images.

3. Select the check box next to a document and click Review. Note that the document status column indicates the status of the request for a document:

    ▪ Green Circle: The document has been requested and received.

    ▪ Yellow Circle: The document has been requested but not yet received.

    ▪ No circle: The document has not been requested.

4. To see more information about the organization that supplied a document, including the date of the last request, select that document and click Doc. Source Info.

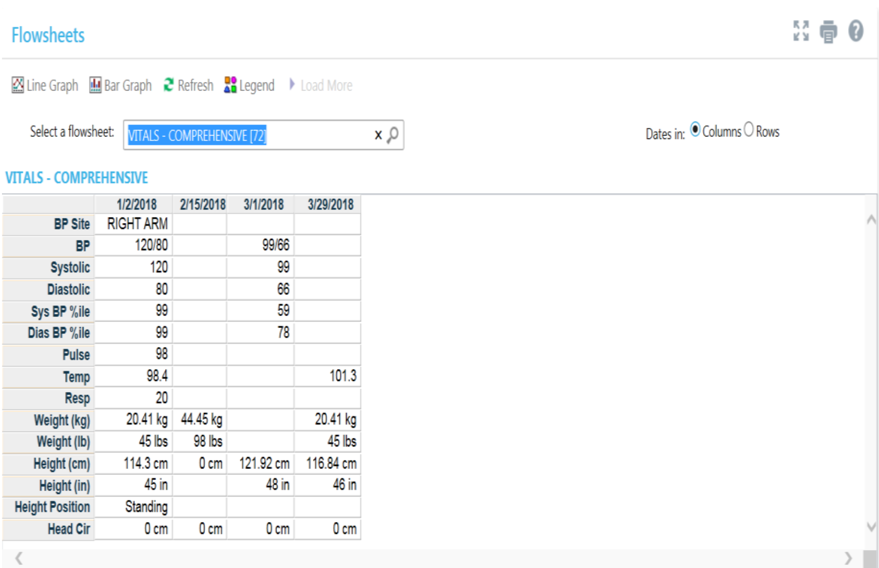
View data in graph or table format via Flowsheet

Use *Flowsheets* activity in Clinical Review to see how patient data such as vital signs or lab values have changed over time.

1. Enter a flowsheet template in the *Select a Flowsheet*: box. You can use the magnifying glass to search for available templates. You can also enter a search work in the field to locate matches. (Example: Enter "lab" to display templates that contain the word "lab" in the title.)

2. Select the table cells that contain data that you want to graph.

3. Click **Line Graph** or **Bar Graph** to create a graph of the selected data.

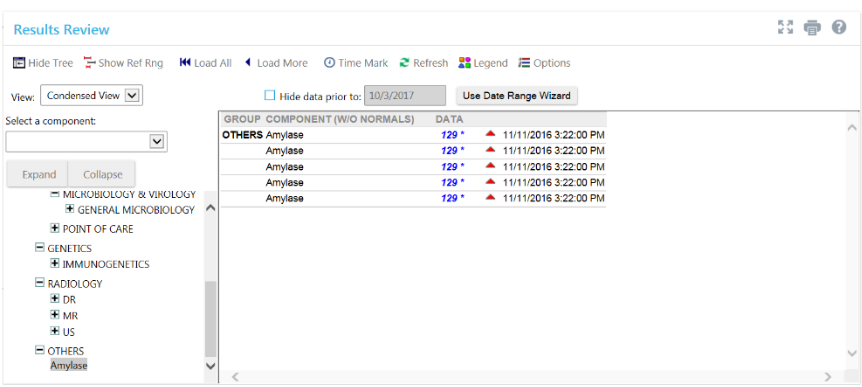


	1/2/2018	2/15/2018	3/1/2018	3/29/2018
BP Site	RIGHT ARM			
BP	120/80		99/66	
Systolic	120		99	
Diastolic	80		66	
Sys BP %ile	99		59	
Dias BP %ile	99		78	
Pulse	98			
Temp	98.4			101.3
Resp	20			
Weight (kg)	20.41 kg	44.45 kg		20.41 kg
Weight (lb)	45 lbs	98 lbs		45 lbs
Height (cm)	114.3 cm	0 cm	121.92 cm	116.84 cm
Height (in)	45 in		48 in	46 in
Height Position	Standing			
Head Cir	0 cm	0 cm	0 cm	0 cm

View a patient's lab results

In addition to lab flowsheets, you can view patient lab results over time in Results Review. View the patient's results for labs, radiology, and more.

1. Select the Clinicals tab and click **Clinical Review > Results Review**. The Date Range Wizard appears.
2. Select the date range for the results data you want to see and click **Accept**. The patient's results appear.
3. To view a specific result component type, such as Hematology, or a specific result component, such as Hemoglobin, expand the tree on the left side of the page. Select the name of the component or component type that you want to view. Only those results appear in the table.
4. To view more columns of results, click **Load More**. To view all columns of a patient's results for the time range that you selected, click **Load All**.



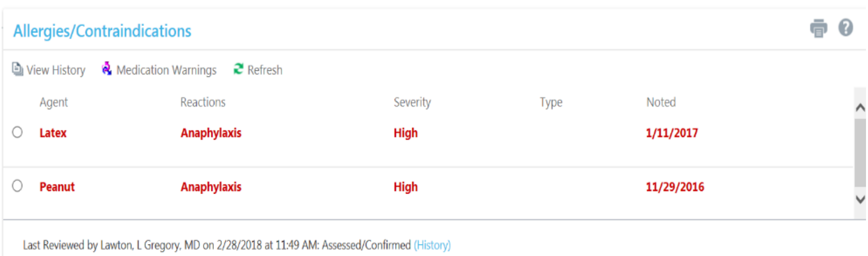
> **TIP:** *Time mark* results so the next time you view the patient's results, you can easily distinguish any new results from those that you have already seen. Click Time Mark to do so.

Customize the way results appear

1. In Results Review, click **Options**.
2. To make the most recent results appear from left to right by default, select the **Trend Dates in reverse chronological order** check box.
3. Set your other default preferences, such as the default number of columns to show, using the other options.
4. Click **Accept**.

View a patient's allergies

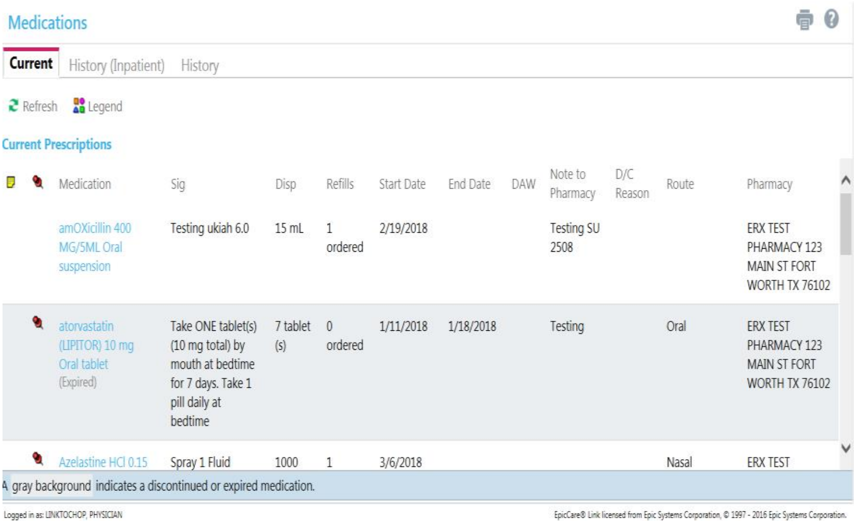
Select the Clinicals tab and click **Clinical Review > Allergies**.



> **TIP:** For more information about an allergy, select the option button next to the allergy and click **View History.**

View a patient's current medications

Hover over the Patient tab and click **Medications**.



		Medication	Sig	Disp	Refills	Start Date	End Date	DAW	Note to Pharmacy	D/C Reason	Route	Pharmacy
		amOXicillin 400 MG/5ML Oral suspension	Testing ukiah 6.0	15 mL	1 ordered	2/19/2018			Testing SU 2508			ERX TEST PHARMACY 123 MAIN ST FORT WORTH TX 76102
		atorvastatin (LIPITOR) 10 mg Oral tablet (Expired)	Take ONE tablet(s) (10 mg total) by mouth at bedtime for 7 days. Take 1 pill daily at bedtime	7 tablet (s)	0 ordered	1/11/2018	1/18/2018		Testing		Oral	ERX TEST PHARMACY 123 MAIN ST FORT WORTH TX 76102
		Azelastine HCl 0.15	Spray 1 Fluid	1000	1	3/6/2018					Nasal	ERX TEST

A gray background indicates a discontinued or expired medication.

Logged in as: LINKTOCHOP, PHYSICIAN

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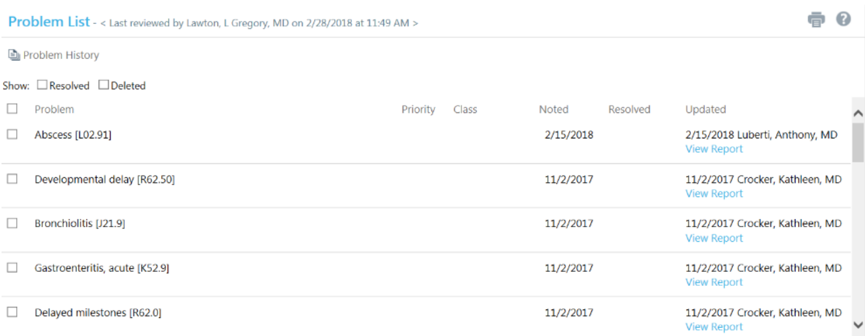
View a list of the patient's current medical problems

Hover over the Patient tab and click **Problem List.**



> **TIP:** For more information about a problem, select the option button next to the problem and click **Problem History**.

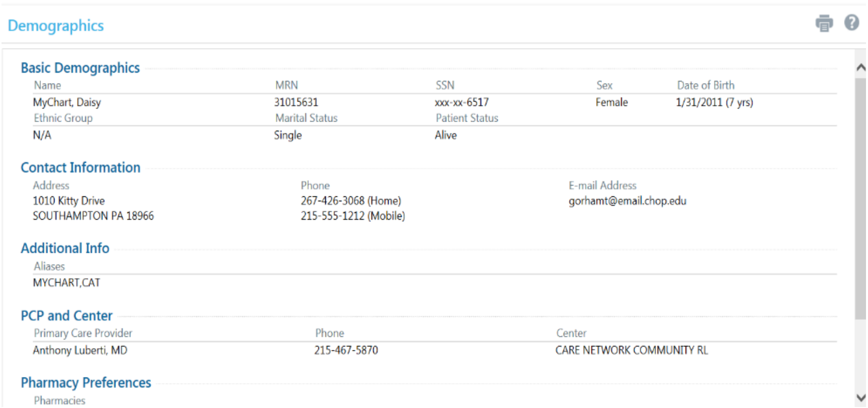
View a patient's history

Hover over the Patient tab and click **Histories**. A report appears with information about the patient's medical, surgical, family, and social history. Note: Social history includes topics like tobacco use and sexuality.

> **TIP:** For a high-level view of the current patient's chart, select **SnapShot** from the Clinical Review menu.

View a patient's demographics

Hover over the Patient tab and click **Demographics**. A report appears with demographic information like the patient's address, PCP, emergency contacts, and more.

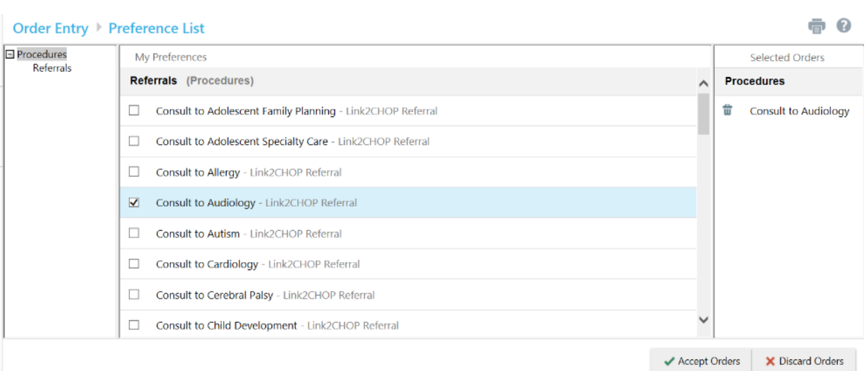


Placing a New Order

You can use Link2CHOP to place referral orders for your patient to take place at The Children's Hospital of Philadelphia. Referral orders can only be placed for patients previously seen at CHOP.

Place a new order

1. Hover over the Patient tab and click **Order Entry**. The Order Entry activity appears.
2. Click **Preference List** to see a list of available orders.
3. Select the check box next to each order that you want to place. These orders appear under Selected Orders on the right side of the page.
4. Click **Accept Orders**. A list of your orders appears.
5. Click an order's name to edit details like associated diagnoses. Click **Accept** when finished.
6. Click **Sign Orders**.
7. Enter your password if prompted and click **Accept**.



	If you already know the name of the order in Link2CHOP, you can search for it in the **New procedure** field.
	Referral orders can be entered without an HIE Authorization being on file. See the Health Information Exchange Authorization for additional information.

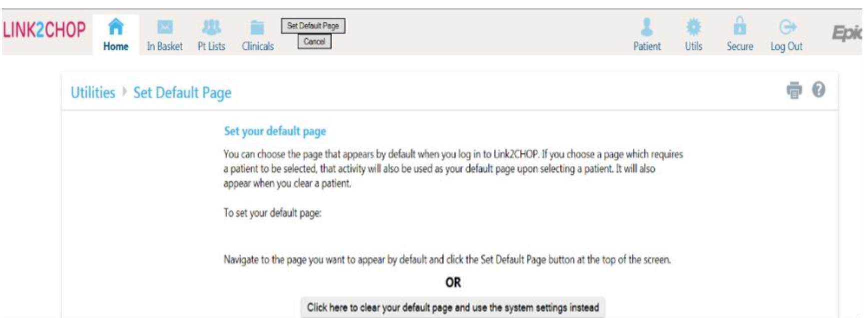
Using Program Utilities

You can use the Link2CHOP utility options to perform a variety of account maintenance tasks, including setting the page that appears when you first log in. You can also use utility options to determine your default patient selection method. A description of each utility appears on the Utilities page.

Change your default page

Use the Set Default Page tool to determine which page you see first when you log in to Link2CHOP. For example, if you prefer to review your In Basket messages each time you log in, you can save time by setting your start page to In Basket.

1. Click  **Utils** and then click **Set Default Page**.
2. Navigate to the page that you want to set as your default page.
3. Click **Set Default Page** at the top of the application to set the current page as your default page.



> **TIP:** To reset your start page to the system default, go to the Set Default Page utility and click **Click here to clear your default page and use the system settings instead.**

Event Monitor

When a patient event that you have chosen to monitor occurs, an In Basket message is sent to the appropriate notification folder.

You may choose event notification preferences in the Event Setup activity in three sections:

1. Access the Event Settings page by following the path **Utils > Event Settings**.
2. Choose which types of events you'll receive notifications for by selecting the check boxes in the Event Filter section. To receive notifications for all the available event types, select the **Events I Will Receive** check box.
3. Choose which events you'll receive notifications for by selecting one of the options in the Relationship Filtering section:
    a. **Any patients seen by my group**. This option includes events for any patient that you have access to.
    b. **Only events associated with a provider in my group (recommended)**. This option includes only events associated with the providers in your provider group. For example, if a patient you have access to is admitted to the hospital, but none of the providers in your group is associated with the admission, you would not receive a notification.
    c. **Only events associated with me**. This option includes only events associated with you

d. **Only events associated with certain providers**. This option includes only events associated with certain providers in your provider group.

4. Choose who your notifications are sent to by selecting one of the options in the In Basket Settings section:

    a. **Any user in my group**. Your notifications are sent to a pool at your organization. Any other user in the pool can access the message and mark it as Done, which removes it from the In Baskets of all the users in the pool. This option helps reduce the risk of duplicate follow-up and can save time.

    b. **Only me**. Your notifications are sent only to you. This option helps ensure you see every notification.

Event Filter

- [x] Events I Will Receive
- [x] Admission
- [x] Appointment Cancelled
- [x] Appointment Checked-In
- [x] Appointment Checked-Out
- [x] Appointment Scheduled
- [x] Check-In/Out Cancelled
- [x] Discharge

Relationship Filtering

Notify me for:

- All events for patients in my group
- Only events associated with a provider, department, vendor, or referral location/POS in my group (recommended)
- Only events associated with me
- Only events associated with certain providers, departments, vendors, or referral location/POSs

In Basket Settings

Allow my messages to be handled by:

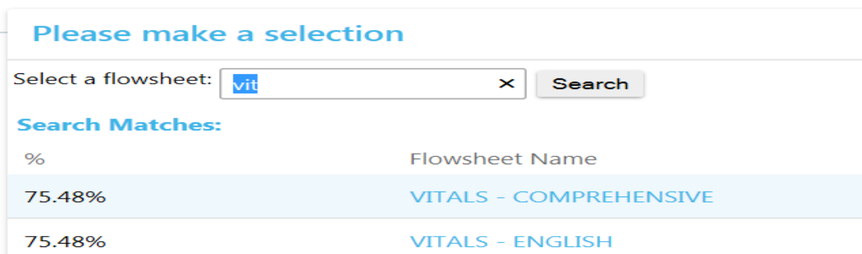
- Any user in my group
- Only me

Activity

Any Web page that corresponds to a specific task, such as selecting a patient, reviewing a patient's results, or creating a referral. There are several different activities in Link2CHOP, and the activities that you use depend on the tasks that you want to complete. Each activity has a name in Link2CHOP, such as Results Review, that helps you determine the activity's purpose.

Completion Matching

Entering a partial word in a field instead of a whole word to reduce the amount of time you spend typing. For example, entering "vital" and then pressing **ENTER** in the **Select a Flowsheet** field in Flowsheets shows you all of the flowsheets beginning with "vital." Since it is likely that few flowsheets have names that start with this letter combination, it is easy to find the flowsheet without typing the whole name. You can use this shortcut for any information that is stored in the database, such as other providers' names.



Encounter

One visit with a provider. This might include a visit type such as an inpatient stay, an office visit, or a telephone call from a patient. Encounters appear in Chart Review. When you view an encounter, you can see all of the information associated with that specific visit, including the patient's vital signs, progress notes, procedures and medications ordered during the visit, and more. Encounters are classified by date, type, and provider.

Event

A clinically relevant business event that occurs for a patient. Events are recorded in the system at several points in a patient flow. For example, events are triggered when a patient schedules an appointment, is admitted to the hospital, cancels an appointment, has new results, etc. The urgency of events can vary. For example, a scheduled appointment for a physical might not be as urgent as an admission to the hospital.

Field

Any place in Link2CHOP where you can enter information. Each field has a prompt to indicate the type of information you should enter, such as **Name** or **MRN**.

Hyperlink

Text that you can click to access a different Web page. Hyperlinks appear in several places in Link2CHOP. When your mouse pointer moves over a hyperlink, the pointer typically changes to a hand icon and the text of the hyperlink becomes underlined.

Reason for Visit History

Provider

Any person involved in patient care, such as a nurse, the patient's primary care physician, or a referring provider. Patient information in Link2CHOP is often associated with a specific provider. For example, procedure orders are associated with the provider who wrote the orders. Similarly, when you create a referral, you can enter a referred by and referred to provider.

Recommended field

Information that we recommend you enter. appears next to recommended fields. You can continue to save or submit information if you do not complete recommended fields.

Required field

Information that you are required to enter. appears next to required fields. You cannot save or submit a form until you complete all required fields.

Search All Patients (Formerly known as First Access)

A tool that you can use to open the record for a patient with whom CHOP does not have you as an established care provider. This tool might be useful in case of emergencies or at other times when you might need to access a patient's record before you've been granted access. The **Search All Patients** hyperlink appears in the Patient Lookup activity. After you click **Search All Patients**, you are prompted to enter specific pieces of information about the patient before you can gain access to the record.

~~Secure screen~~

~~A method for securely hiding patient information when you need to temporarily stop your work in Link2CHOP. Click~~ Secure ~~to secure your computer. Your Web browser returns to the login page for the application. When you are ready to continue your work, you can re-enter your password and click **Resume** to return to the same page that you were using before you secured the screen.~~

Time mark

Click **Time Mark** in the Results Review activity to indicate that you have seen the patient's new results. When you do so, the results are no longer considered new to you. The next time you access Results Review for the patient and select the **New Results View** from the View menu, only the results that have been entered since you clicked **Time Mark** appear. New results appear in italic font, and all other results that you indicated that you've seen appear in normal font.