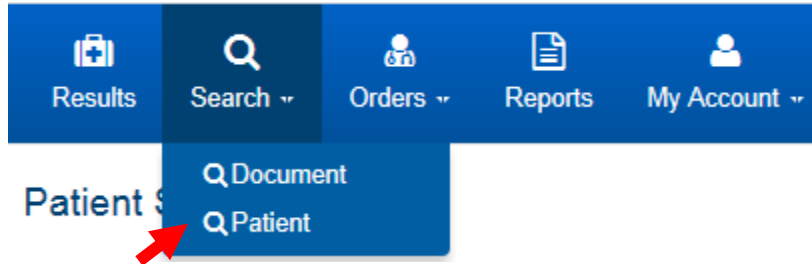


➤ Patient Archive

- To view information specific to a patient including documents, orders inbox, and visit history you will need to access the Patient Archive.
- From the menu bar, click “Search” and select “Patient Search”.



- Patient Archive is the default search option and will be grayed out indicating that it is selected.
- Enter search criteria and click “Search”.

Patient Last Name ^B !
 Patient DOB !
 Patient Gender
 Patient MRN ^C

Patient First Name ^B
 Patient SSN !
 Patient Zip Code

Required | Conditionally Required

- Click the patient’s name to open the Patient Summary.

1 Patient(s)

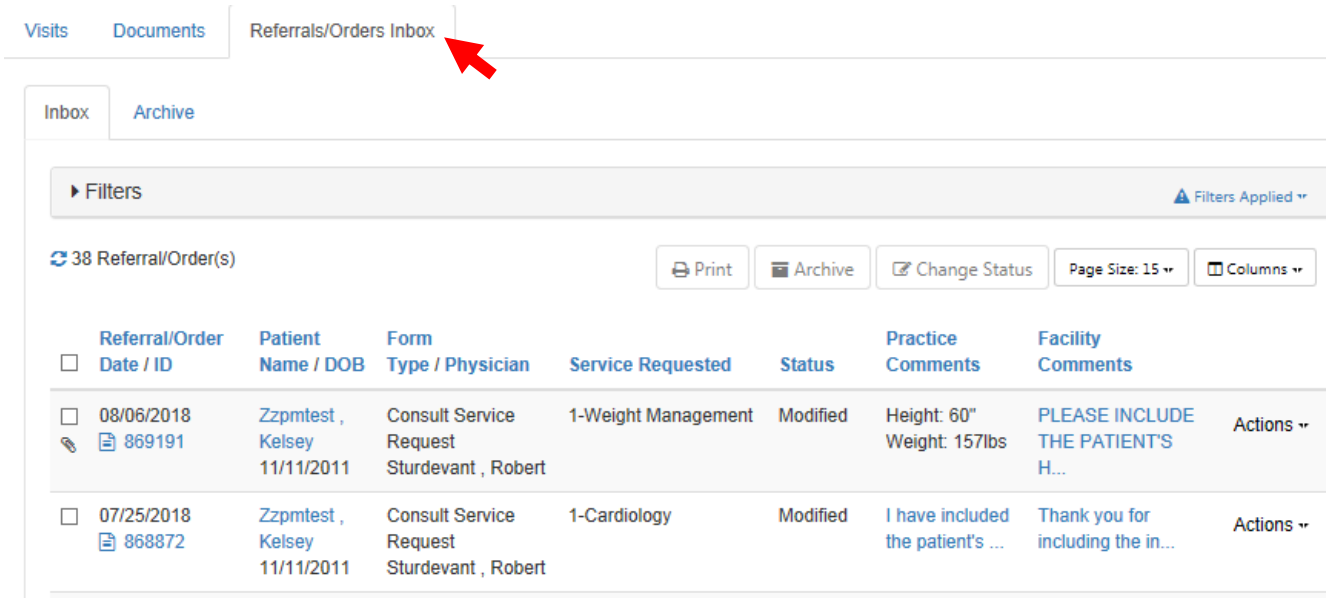
Patient Name	Patient DOB	Patient SSN	Patient Gender	Patient Zip Code
Zpmtest, Kelsey	11/11/2011		Female	66062

- From the Patient Summary view, you will see patient demographic information populate along the top of the screen. You can also choose to “Create Referral/Order” from this screen.

Zpmtest, Kelsey

GENDER: F DOB: 11/11/2011 ADDRESS: 1234 Main St, Olathe, KS
 PHONE: SSN: ZIP: 66062

- To view the patient's Orders Inbox, click the "Referrals/Orders Inbox" tab.

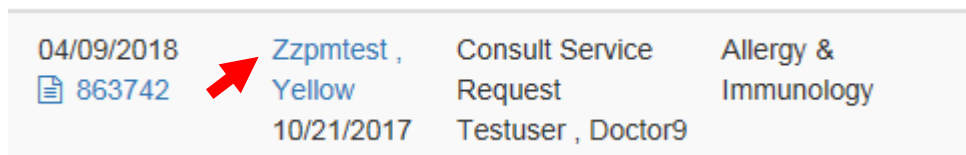


Referral/Order Date / ID	Patient Name / DOB	Form Type / Physician	Service Requested	Status	Practice Comments	Facility Comments	Actions
08/06/2018 869191	Zzpmtest , Kelsey 11/11/2011	Consult Service Request Sturdevant , Robert	1-Weight Management	Modified	Height: 60" Weight: 157lbs	PLEASE INCLUDE THE PATIENT'S H...	Actions
07/25/2018 868872	Zzpmtest , Kelsey 11/11/2011	Consult Service Request Sturdevant , Robert	1-Cardiology	Modified	I have included the patient's ...	Thank you for including the in...	Actions

- You can set filters and sort the inbox the same way you would for your practice's inbox.
- Orders in the "Inbox" tab will be current while orders under the "Archive" tab will be past orders that have been submitted for the patient.

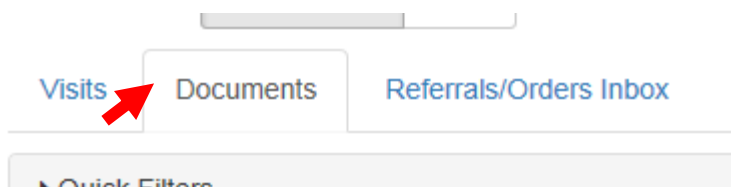
➤ Document Tree

- The Document Tree allows you to view all patient documents that have been submitted through My Patient Connections for a particular patient.
- You can access the Document Tree by clicking on the patient's name hyperlink from the Results Inbox, Orders Inbox, or Patient Search.



04/09/2018 863742	Zzpmtest , Yellow 10/21/2017	Consult Service Request Testuser , Doctor9	Allergy & Immunology
----------------------	------------------------------------	---	----------------------

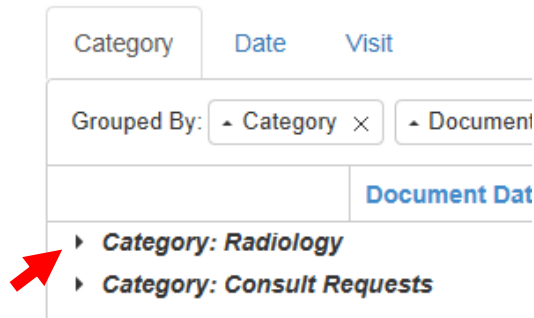
- This will open the Patient Summary screen.
- Click on the Documents tab.



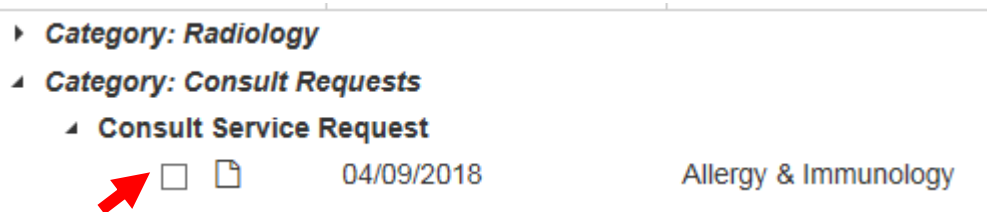
Visits Documents Referrals/Orders Inbox

Quick Filters

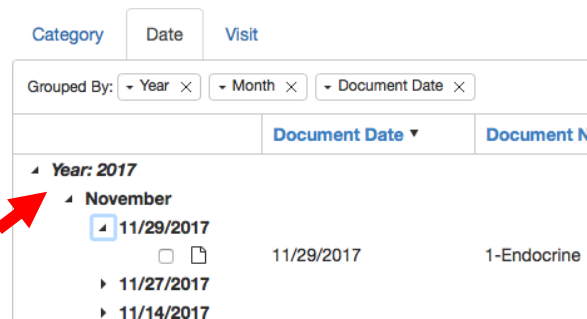
- Category view is the default document view.



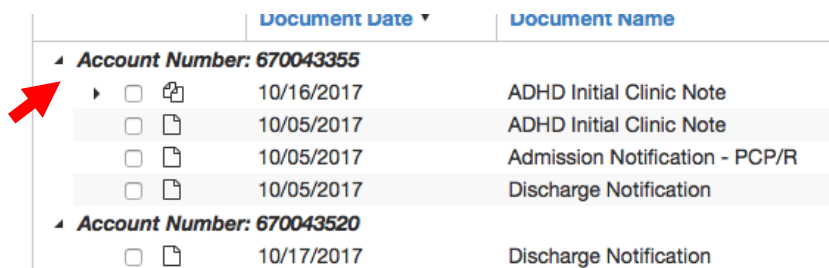
- Click on the ▶ icon to expand the category and select the document you want to view.



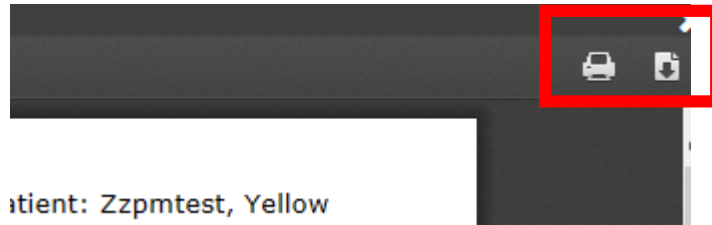
- You can view multiple documents by checking the box next to each document you wish to open.
- You can also view documents by date or visit.
- Date view groups and organizes the documents in descending order. Folders can be re-sorted by date order.



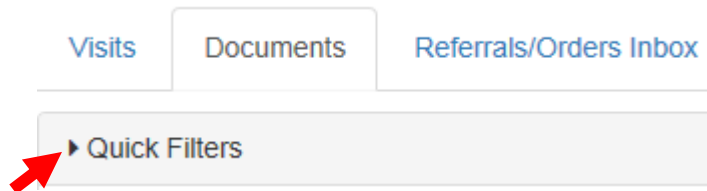
- Visit view groups and organizes the documents by visit. Folders can be re-sorted by account number.



- To print or save the document, click on the appropriate icon in the upper right corner of the screen.



- You can also set filters to sort documents by category or type by clicking “Quick Filters”.



- Enter filter criteria and click “Apply”



Quick Filters

Document Name

Document Category

Document Type

Document Date Range To

Contains

Clear