



eCW Patient External Document Retrieval Guide

This guide is designed to help eClinicalWorks users retrieve health summary information from Healthix directly within their application. To access a patient's information, the patient's affirmative consent must be registered in the system. Please follow the steps outlined below. If you have any questions or need assistance, contact the Healthix Support Desk at 1-877-695-4749, or visit www.healthix.org for additional user resources.

Requesting Electronic Health Summaries from Healthix

Step 1: You can view and import your Electronic Health Summaries (eHS) from the **Progress Notes** Window and the **Patient Hub**

Progress Notes:

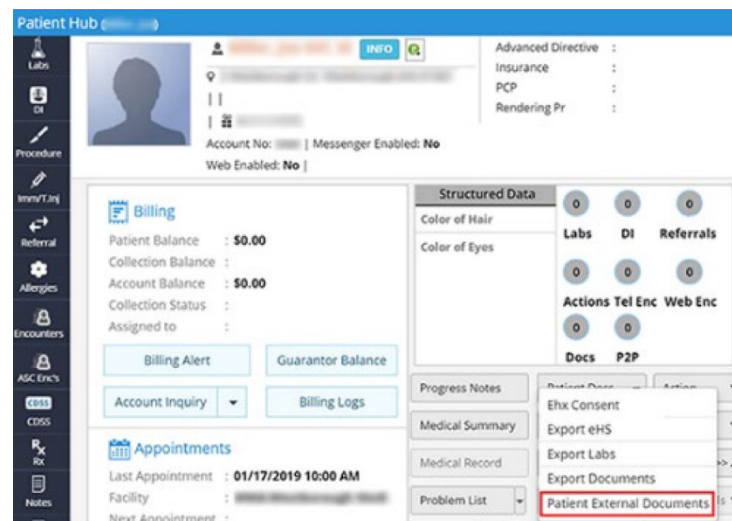
On the patient's Progress Notes window, click the *Patient External Documents* Link



OR

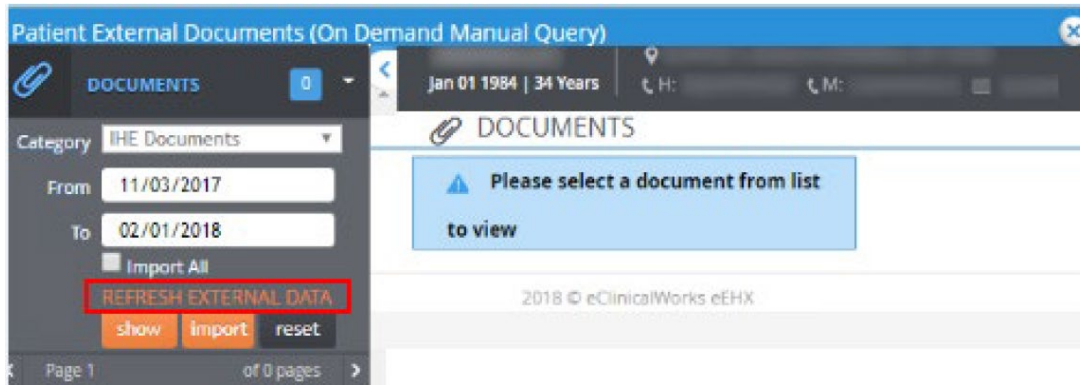
Patient Hub:

On the Patient Hub window, click the *Patient External Documents* Link:



The Import Documents window opens

Step 2: Click the *Refresh External Data* link to get the latest data from Healthix



The following message displays: *Requesting registry...please wait.*

Note: To ensure that you receive the most recent data from Healthix, always refresh the data before opening any document.

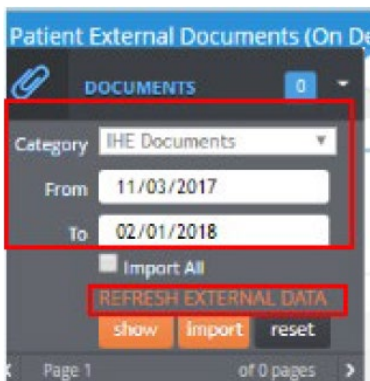
If data is available, the Patient Detail link displays.

Step 3: Click the *Patient Detail* link.

- A document opens containing an aggregation of all clinical data available in Healthix for this patient
- **If the data is not available or if consent has not been granted**, a No Document Found message will display.
- By Default, the system will query for clinical data within the last 90 days

Step 4: (OPTIONAL)

- Adjust the date range using the date range fields and click *Refresh External Data* to display data from a specific date range.
- Certain clinical elements, such as advanced directives, problems, family and social history, and allergies, will be included regardless of the date range selected:

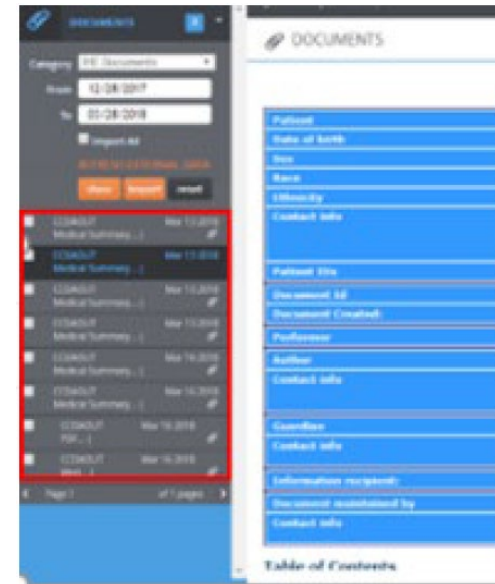


Note: Only aggregated eHS will be returned. These documents can be found on the All and Medical Summary tabs. Those documents will not be available on the Labs, Scanned Documents, and PHR tabs.

Viewing an Electronic Health Summary (eHS)

Step 1: Click the name of the document in the Import Documents window:

The eHS opens in a new window.



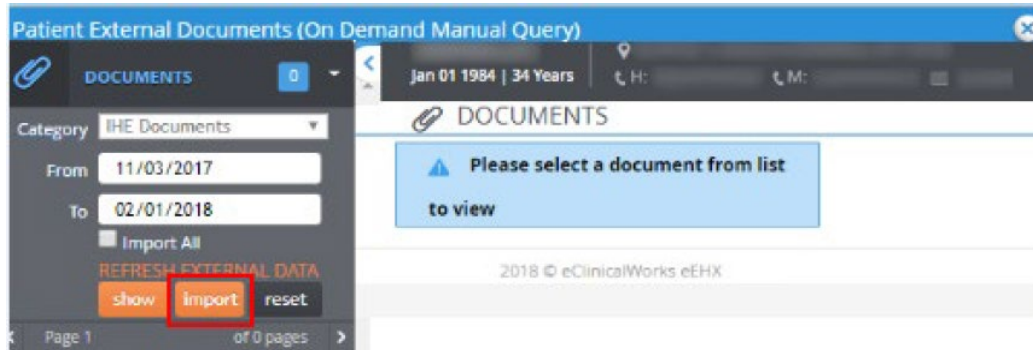
The table of contents section lists each clinical section of the eHS that is included for the selected patient. Click a link to navigate directly to a specific section.

Note: depending on the amount of data available, you may need to use the up/down and left/right scrollbars to view all the data.

Importing a patient's Medical Summary to Documents Folder (EHR)

Step 1: On the Import Documents window, check the box next to the document.

Step 2: Click *Import*:



A confirmation message displays, indicating that the document has been successfully imported. These documents will be saved to the Documents folder or the folder designated by your practice during the configuration process.

Enabling Patient External Documents Link on Patient Hub

For any user, if the Patient External Documents link is missing on the Patient Hub window, please contact eCW support.