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# PatientKeeper Guide for Office Staff

Using PatientKeeper to retrieve patient records for HCA South Atlantic Division

*(click the links to the left to navigate through the guide)*

Physician Services

Last Updated: 3/18/2021

**HCA**   
Healthcare™

South Atlantic  
Division

# Patient Access Restrictions

Due to HIPAA and privacy regulations, clinical support staff should only be accessing records on a need to know basis for patients that have a system relationship to Providers within the users Provider group or for whom the user has access to the proper search criteria (Last Name, First Name, Date of Birth and Full SSN or Medical Record Number).

- **The default access for all new users in PatientKeeper is as follows:**

- The patient has a link established (system relationship) with a Provider associated with the user's Provider Group within the hospital's electronic medical record; AND the Provider has been issued their own HCA <sup>3/4</sup> user ID (either because they are currently credentialed at the facility or have requested system access to the patient portal).
- If both of these conditions do not exist for a patient, users will be unable to search for or access any records information on that patient. For examples of what creates a system relationship, please see the next page.

- **Other Patient Records Search Options:**

- In many instances, the default search options do not provide adequate access to the clinic to retrieve patient records for continuity of care. In these cases, user access can be adjusted. Please consult the Patient Search section for more details on the available search options and how to request modified patient search access.

- **How Do Providers Request System Access?**

- If Providers in your group would like to request system access and are not credentialed at the facility, please have them reach out to the Medical Staff Services office at the facility.

- **If you have questions or concerns, please reach out to the Service Desk at 888-252-3397.**

# System Relationships to Providers *(examples)*

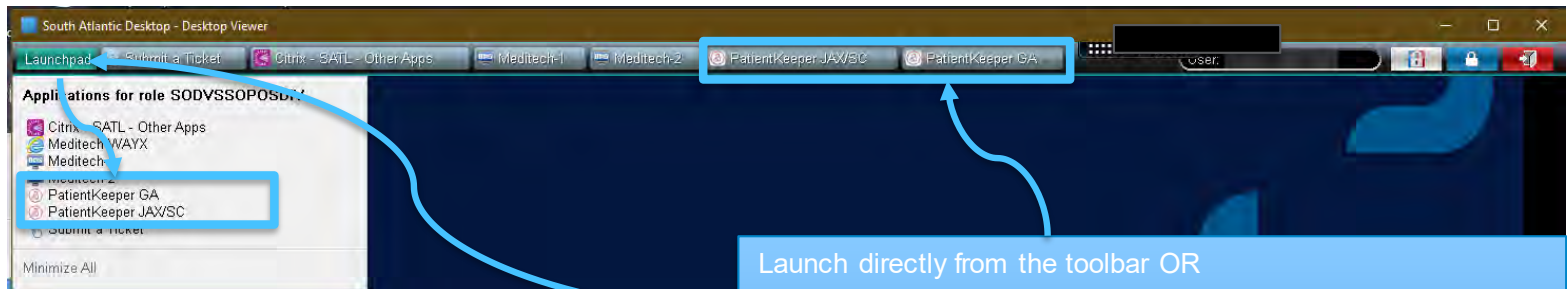
- Common Ways System Relationships are Established (others may apply):

- Patient identifies Group Provider as their Primary Care Provider upon registration
- Group Providers have ordered tests on the patient and are listed as the Ordering Provider.
- Group Providers have referred the patient to the facility for various reasons and are listed as the Referring Provider.
- Providers within the facility have entered a Consult order for the Group Provider (note: If a Provider consults or documents on a patient but no Consult Order has been entered, this will not establish a relationship)

- Note: Office Staff will typically not have access to patients who have visited the ED and are coming to the office for a follow-up referral. This is due to the fact that the Group Provider has not seen them in the facility and no Consult Order has been written to the Group Provider. In this case, the recommendation is for either one user in the office to have modified search access to access these records or to contact Medical Records to fulfill the request.

# PatientKeeper Overview

- PatientKeeper provides view-only access for clinical information on patients seen at requested facilities in the HCA South Atlantic Division. Your welcome email will indicate the facilities you have access to.
- Launch PatientKeeper from the toolbar at top of patient portal desktop.
  - **South Carolina & Jacksonville:** PatientKeeper JAX/SC
  - **Georgia:** PatientKeeper GA



Launch directly from the toolbar OR

Click the **Launchpad** button and choose the available PatientKeeper instance.

- **South Carolina & Jacksonville:** PatientKeeper SC/JAX
- **Georgia:** PatientKeeper GA

# Interface & Navigation

The screenshot displays the PatientKeeper interface with the following components:

- Navigation Bar:** Patient List (14), Sign-Out Summary, Patient Search, Assignment, Forms, Charges, Order Search, Inbox, Provider Directory, Admin, Resources, Queries.
- Header:** PatientKeeper logo and user profile icon.
- Filter Bar:** Actions, Z\_Test Patients, CPOED, ADULTPT1 T. (65Y Female) MRN D000542618, Last 5 Years, All.
- Table of Patients:**

Actions	Pre.Reg	Pre.Reg	Information
			CPOED, TEST1 40Y Male LOS:397D inpatient
			CPOED, ADULTPT1 T 65Y Female LOS:1470D Pre-Inpatient
			CPOED, ADULTPT1 T 65Y Female LOS:67D Pre-Inpatient
			CPOED, DOCTOR1 Pre-Inpatient
			CPOES, TEST3 46Y Female LOS:67D Pre-Inpatient
			CPOES, TRAIN1 7Y Female LOS:2106D Pre-Inpatient
			CPOED, DOCTOR1 Pre-Inpatient
			CPOED, TEST1 62Y Female LOS:67D Pre-Inpatient
- Left Panel (Modules):** Orders, Vitals, I/O, Lab Results, Test Results, Clinical Notes, Medications, Home Meds, Allergies, Problems, Patient Detail, Overview, Visits, Charges.
- Right Panel (Test Results):**

Date/Time	Test (36 of 36)	Status	Source
03/08/21 11:50	BLOOD CULTURE	Cancelled	Trident Regional Medical Center
03/08/21 11:50	BLOOD CULTURE	Cancelled	Trident Regional Medical Center
01/27/21 12:39	ABBOTT CORONAVIRUS ID NOW	Cancelled	Trident Regional Medical Center
12/01/20 13:23	APT TEST	Cancelled	Trident Regional Medical Center
11/09/20 10:01	CRYPTOSPORIDIUM BY EIA, FECES	Cancelled	Trident Regional Medical Center
11/03/20 13:57	C. DIFFICILE PCR, C. DIFFICILE-027 PCR	Cancelled	Trident Regional Medical Center
09/23/20 08:07	COVID ANTIGEN 2019	Cancelled	Trident Regional Medical Center
09/10/20 12:00	CVD19 CONV PLASMA	Cancelled	Trident Regional Medical Center
08/18/20 08:53	CORONAVIRUS 2019 ABBOTT ID NOW	Cancelled	Trident Regional Medical Center
07/15/20 16:30	C. DIFFICILE PCR, C. DIFFICILE-027 PCR	Cancelled	Trident Regional Medical Center
07/15/20 16:26	C. DIFFICILE PCR, C. DIFFICILE-027 PCR	Cancelled	Trident Regional Medical Center
07/14/20 07:44	NOVEL CORONAVIRUS 2019.GS	Cancelled	Trident Regional Medical Center
- Bottom Panel (BLOOD CULTURE Detail):** Status: Cancelled, Source: Trident Regional Medical Center. Specimen: 21:TR:BC0004752U (CAN). Source: BLOOD. Specimen Desc: OTHER. Coll Date: Mar 8, 2021 11:50am. Recv Date: Not Received. Submitted By: CPOED, DOCTOR1. Ordered By: CPOED, DOCTOR1. Facility: TRIDENT LABORATORY I#39851150.

- Patient Lists & Patient Search Tabs: Access these tabs to view pre-filtered patient lists & data or search for patients
- Actions & Patient List Drop Downs: Change between various patient lists, use Actions to sort, add/remove patients, etc.
- Patient Care Information Modules: Choose what patient data to view (must select a patient first)
- Date Filter: Default is 30 days. Change to view previous dates (not available for Clinical Notes or Lab Results)

# Interface & Navigation

The screenshot displays the PatientKeeper interface. At the top, there is a navigation bar with tabs: Patient List (14), Sign-Out Summary, Patient Search, Assignment, Forms, Charges, Order Search, Inbox, Provider Directory, and Admin. The 'Patient List (14)' tab is selected and highlighted. Below the navigation bar, there is a search bar and a list of patients. The first patient, 'CPOE, TEST1', is highlighted in red. A blue arrow labeled 'Step 1' points to this patient. To the right of the patient list is a detailed view for the selected patient. The 'Patient Detail' module is highlighted in red. A blue arrow labeled 'Step 2' points to this module. The right-hand pane displays various data fields for the patient, including demographics, clinical notes, medications, allergies, and problems. A blue arrow labeled 'Step 3' points to the data displayed in this pane.

Module	Field	Value
Patient Detail	Name	CPOE, TEST1
	Gender	Male
	Age	40Y
	Race	OTHER
	Marital Status	UNKNOWN
	DOB	10/10/1980
	MRN	CM00202085, F000943487, D000763988
	Next of Kin	NAME, NAME
	Next of Kin Relationship	UNKNOWN
	Next of Kin Phone	(123)123-1234
Demographics	Home Address	123 FAKE ST. N CHARLESTON, SC 29406
	Alternate Address	Alternate
	Home Phone	Home (999)999-9999
	Next of Kin Address	WER SDFAS CITY, SC 12334
	Account Number	D00055713007
	Reason For Visit	TESTING
	Referral Code	
	Appointment Date/Time	
	Financial Class	
	PK Patient Key	38399647
Status	ADT Visit Type	PRE ER
	PK Visit Key	411737876
Online		Online

1. Click on a patient to select. Selected patient will be highlighted.
2. Click on module to view specific data type. Selected module will be highlighted.
3. Data specific to that module & patient will appear in right column.

# Records Modules

- [Orders](#) – Display a list of all orders & the status
- [Vitals & I/O](#) – Displays patient vitals & I/Os
- [Lab Results](#) – Includes all laboratory reports.
- [Test Results](#) – Includes Radiology, Pathology & Microbiology.
- [Clinical Notes](#) – Includes H&P's, Consults, Discharge Summaries, Operative Reports, EKG reports, Echocardiograms, Nuclear Medicine, Stress Tests, etc.
- [Medications](#) – List of medications that can be filtered a number of ways
- [Home Meds](#) – List of medications reported by patient upon admit.
- [Allergies](#) – List of reported allergies that can be sorted by class (i.e. food, drug, etc.)
- [Patient Detail](#) – Equivalent to a patient face sheet.
- [Visits](#) – List of visits by Admin/Discharge Date and reason.
- [Prior Charts](#) – if enabled, provides access to historical patient data
- [HIE Clinical Viewer](#) – view patient records from other HCA owned facilities (hospitals & outpatient practices). *Note: Much of this information from other facilities is also integrated into & available within the individual modules (ex. Clinical Notes, Lab, Test Results, etc.)*

Orders
Vitals
I/O
Lab Results
Test Results
<b>Clinical Notes</b>
Medications
Home Meds
Allergies
Patient Detail
Overview
Visits
PDMP Florida
UpToDate
PDMP South Carolina
HIE Clinical Viewer
Prior Charts

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# PATIENT LISTS

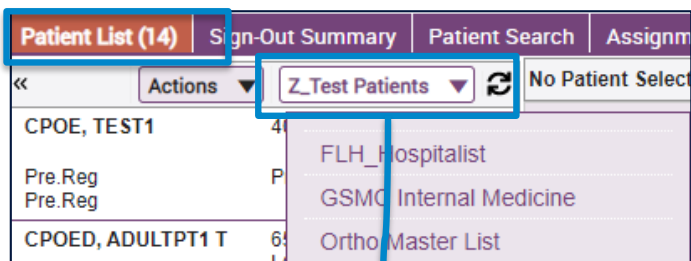
Patient lists are created for each user and are customized based on various criteria available.



# Patient Lists - Overview

- All user have default lists available upon first sign in.
  - **Provider Group List**: Shows patients with current active accounts at the requested facilities (ED, Inpatient, Outpatient, etc.) who have established a system relationship to Providers associated with the group.
    - Patients will add automatically upon registration and fall off automatically 14 days after the account discharges. (can be modified to a longer period of time upon request)
  - **Manual List**: Users may have a manually managed list called “My Patients” or “My Follow-Up” that allows addition of patients who will stay on the list until they are manually removed.

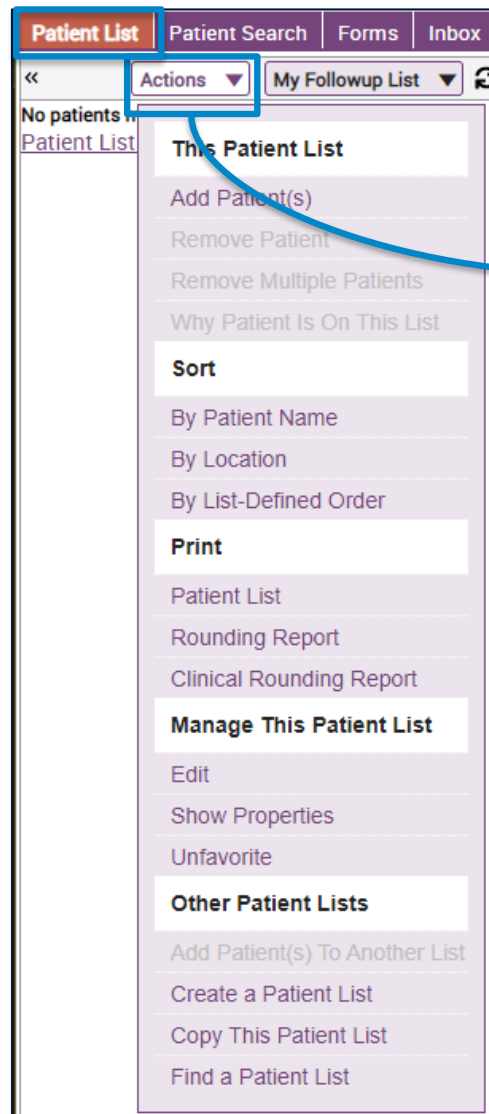
# Patient Lists - Navigation



- Switch patient list in drop down
- List selection remains until changed again.

### Group Patient List Criteria

- Has an identified system relationship with any Provider in the group who has system access.
- Automatically added when patient is admitted through the ED, Inpatient or an Outpatient setting in the facility.
- Automatically removed 14 days after discharge (this time frame can be modified upon request).



### Actions Available for Current List

#### Actions

- Add / Remove Patient(s)
- Why Patient is On This List

#### Sort

- By Patient Name
- By Location
- By List-Defined Order

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# PATIENT SEARCH

Patient search is available to find and access patients who meet the user entered search criteria and who are not listed on the Patient Lists (i.e. do not have current accounts at the hospital).

# Patient Search – Access Overview

- Users are limited to only **one** type of patient search but there are multiple search options (see next page for options)
  - Example: Users with the default Provider Relationship will not be able to enter four point data (Name, Date of Birth and SSN) and return the patient if the patient does not have an existing Provider Relationship.
  - Example: Users with 4 point search will not be able to enter one of the data points (Name) and return any patient data. Users must always enter the 4 required points of data to return patients.
- Offices can request different search configurations for different users to allow for a broad spectrum of access based on roles and needs.
- To request a modification to existing patient search access, please contact the Service Desk at 888-252-3397.

# Patient Search – Search Types

- Provider Relationship (Default):
  - Patients will only be accessible if they have an established system relationship with any of the Providers in the group (see page 4 for examples).
- Four Point Search with SSN:
  - The Provider Relationship restriction is removed and users are able to search for any patient as long as they have the following criteria: First Name, Last Name, Date of Birth and full Social Security Number (SSN)
  - *Recommended for appointment schedulers, staff who's Provider doesn't have system access or who do not have the same Providers in the clinic all the time.*
- Four Point Search with MRN / Account Number:
  - The Provider Relationship restriction is removed and users are able to search for any patient as long as they have the following criteria: First Name, Last Name, Date of Birth and the Medical Record Number (MRN) OR First Name, Last Name, Date of Birth and the Account Number
  - *Recommended for staff who can have Providers bring facesheets or other identifying information from the hospital*

# Patient Search – Interface

1 Patient Search Tab

2 Search Fields: Enter patient information to search. If field are marked with a red \* they are required. If SSN is required, full social must be entered.

3 Search Results: If patient information is found, the data will show here.

4 View Patient Data: Click the paper icon to open & view patient records.


Name (13)	DOB	Gender	MRN	Visit #	Type	Admit/Appt	Discharge	Location
CPOED, ADULTPT1 TMC	09/09/1955	Female	0000542618	D00040703048	PRE IN	10/15/12		Pre.Reg
CPOED, ADULTPT1 TMC	09/09/1955	Female	0000542618	D00036530222	(Cancelled)	10/11/12 16:20	10/13/12	(Cancelled)
CPOED, ADULTPT1 TMC	09/09/1955	Female	0000542618	D00036530222	(Cancelled)	10/11/12 16:21	10/11/12	(Cancelled)
CPOED, ADULTPT1 TMC	09/09/1955	Female	0000542618	D00049592712	(Cancelled)	09/30/15 09:38		(Cancelled)
CPOED, ADULTPT1 TMC	09/09/1955	Female	0000542618	D00049231987	(Cancelled)	08/20/15 13:07		(Cancelled)
CPOED, ADULTPT1 TMC	09/09/1955	Female	0000542618	D00036530222	PRE ER	02/01/13 15:10	02/03/13	
CPOED, ADULTPT1 TMC	09/09/1955	Female	0000542618	D00058044207	PRE IN	12/31/20		Pre.Reg
CPOED, ADULTPT1 TMC	09/09/1955	Female	0000542618	D00041420344	PRE IN	01/14/13 03:50		Outpatient

1. Patient Search Tab
2. Search Fields: Enter patient information to search. If field are marked with a red \* they are required. If SSN is required, full social must be entered.
3. Search Results: If patient information is found, the data will show here.
4. View Patient Data: Click the paper icon to open & view patient records.

# Patient Search – Tips for Searching


- Red asterisks indicate required fields and will only be enabled if user has requested [four-point search](#). No patient information will be returned unless all of this information is entered.

Patient Search Criteria




Last\*  First\*  DOB\*   SSN\*  MRN

- Always make sure the search boxes are empty if you are having issues searching on specific information. Make sure the *“Include Cancelled Visits”* and *“Include Past Visits”* are checked. Limiting search criteria may minimize the number of results that are returned.

Patient Search Criteria

Last  First  DOB   SSN  MRN

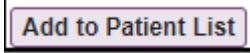
Visit Search Criteria

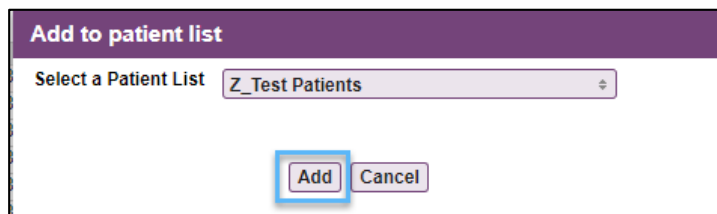
Visit Type	<input type="text"/>	Visit Number	<input type="text"/>
Admit From	<input type="text"/> 	Admit To	<input type="text"/> 
Admit in last N days	<input type="text"/>	Facility	<input type="text" value="Trident/Summerville"/>
D/C in last N days	<input type="text"/>	Unit	<input type="text"/>
Appointment Date	<input type="text"/> 	Visit Status	<input type="text"/>

Include Cancelled Visits  Include Past Visits





Display 200 Results

# Patient Search – Opening Results

- When search results are returned, select the patient and do one of the following:
  - Add the patient to the manually managed list. This keeps from having to always search for patients you may need to view regularly.
    - Click “Add to Patient List” is bottom left corner. 
    - Select the “My Patients” or “My Follow Up” list



- Quickly view and access patient records directly from search screen by clicking the paper icon, which will pop open a screen with access to the patient records modules

Name (13) ▼	DOB	Gender	MRN
CPOED, ADULTPT1 TMC	09/09/1955	Female	 0000542618
CPOED, ADULTPT1 TMC	09/09/1955	Female	 0000542618
CPOED, ADULTPT1 TMC	09/09/1955	Female	 0000542618
CPOED, ADULTPT1 TMC	09/09/1955	Female	 0000542618



# Patient Search – Viewing Patient Records

1. Click on the module to view the specific record type needed.
2. Available reports appears in the top right column – click to select the report.
3. The report detail displays in the bottom part of the screen.

The screenshot shows a 'Patient Detail' window for 'CPOED, ADULTPT1 T. (65Y Female) MRN'. The left sidebar contains a menu with 'Clinical Notes' highlighted. The main area displays a table of clinical notes and a 'Discharge Summary Detail' section. Three blue callouts with arrows indicate the steps: Step 1 points to the 'Clinical Notes' menu item; Step 2 points to a row in the clinical notes table; Step 3 points to the 'Discharge Summary Detail' section.

Date/Time	Note Type	Author	Source
06/11/20 10:17	Clinical Event Note		
06/11/20 10:17	Discharge Summary	CPOED,DOCTOR1	Trident Regional Medical Center
10/05/15 13:34	ED Provider Report		Trident Regional Medical Center

**Discharge Summary Detail**

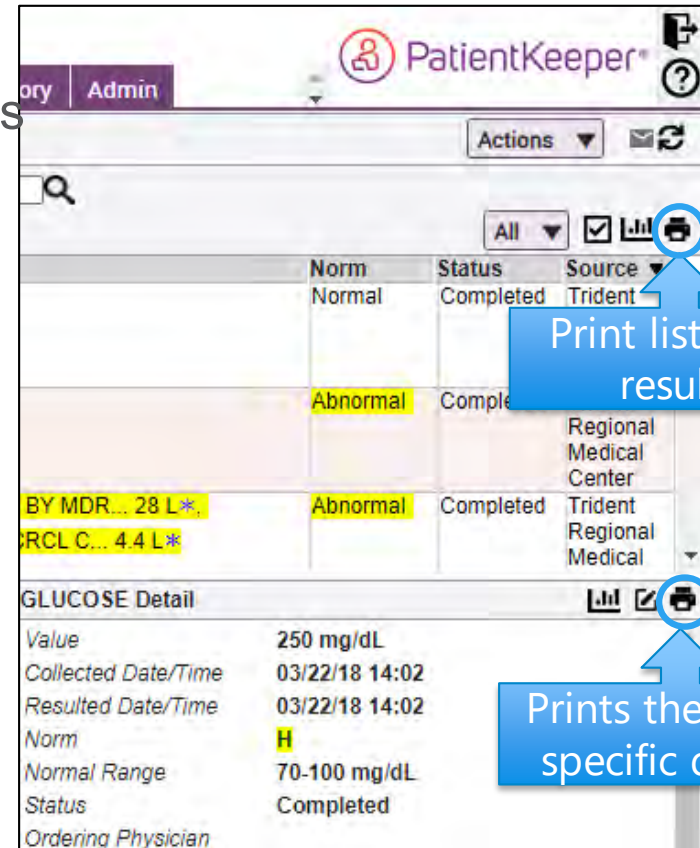
Discharge Summary  
REPORT#:0611-0342 REPORT STATUS: Draft  
DATE:06/11/20 TIME: 1017

PATIENT: CPOED,ADULTPT1 TMC UNIT #: [REDACTED]  
ACCOUNT#: [REDACTED] ROOM/BED:  
DOB: 09/09/55 AGE: 65 SEX: F ATTEND: CPOED,DOCTOR1  
ADM DT: 12/31/20 AUTHOR: CPOED,DOCTOR1  
REP SRV DT: 06/11/20 REP SRV TM: 1017  
\* ALL edits or amendments must be made on the electronic/computer document \*

PCP

# Printing Reports

- Reports can be printed from PatientKeeper as long as there is a printer installed on your local workstation.
- The remote session selects the default printer from your local workstation.
- What prints depends on where the printer is selected (see screenshot)
- HCA does not provide support for printing issues beyond basic remote portal troubleshooting. Setting the default printer and other local issues should be managed by Practice IT.



# HIPAA – General Safeguards for Electronic Media

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- **Workforce members must take appropriate safeguards to limit disclosure of PHI (patient health information) at workstations and other areas where computer monitors may be located:**
  - Computer monitors must be positioned away from the direct view of the general public.
  - Password protected screensavers must be in place on computer monitors.
  - Passwords must not be displayed or viewable (e.g., attached to the monitor).
  - Refer to Corporate Information Security Physical Security Standards for more details.
- Corporate Information Security maintains Policies, Standards, guidance, and procedures which outline comprehensive administrative, physical and technical safeguards to PHI which is stored on electronic media (ePHI), including detailed encryption requirements. For the purposes of this policy, facilities must ensure that:
  - No media (e.g., cellular telephones, flash or “thumb” drives, laptop computers, workstations) are used to access or store PHI without appropriate encryption and authorization. Refer to Corporate Information Security Standards for more details.
  - No personal media may be used to connect to the Company network, or to access or store PHI (or any type of Company data) unless specifically approved using the procedures outlined in Information Security Guidance: Connecting Non-Company PCs. This guidance defines the approval process and the specific data safeguards that must be in place (including, but not limited to, encryption).
  - Only mobile devices with sufficient security controls, including encryption capabilities, may connect to the Company network. Required approvals vary, and are listed on the Mobile Device Request Form. Completed Forms with signed approvals must be sent to the Corporate IT&S Asset Management team for final review and approval. See references below for more information about which devices are allowed to connect, the types of data access permitted, and the approval process. Also refer to the Information Security site on Atlas, and the Asset Management Mobile Device Portal on Atlas.
- All Company employees, workforce members, and any other individuals who have potential access to Company sensitive data (including PHI), must sign the Company Confidentiality and Security Agreement (CSA) pursuant to the Information Confidentiality and Security Agreements Policy, IS.SEC.005.



**Questions? Need Assistance?**

**888-252-3397**

**Call the Service Desk Anytime,  
Anywhere!**

- **Password resets & Account Unlocks**
- **Device Support**
- **Urgent After Hours Issues**
- **General inquiries**