Kentucky Health Information Exchange (KHIE)

Event Notifications: Bulk Upload Patient Panels in the ePartnerViewer

Quick Reference Guide

April 2023

Document Control Information

Document Information

Document Name	Event Notifications: Bulk Upload Patient Panels in the ePartnerViewer Quick Reference Guide

Document Edit History

Version	Date	Additions/Modifications	Prepared/Revised by
0.1	03/28/2023	Initial Draft	KHIE/Deloitte Consulting
1.0	03/31/2023	Revised to only include the step-by-step instructions for a quick reference guide to be used for the help icon in the bulk upload section of the ePartnerViewer	KHIE/Deloitte Consulting

Table of Contents

1 Introduction

This is a step-by-step guide for adding a bulk upload patient panel in the ePartnerViewer. For a complete review of all new functionality associated with Event Notification Bulk Uploads, please refer to the official *Bulk Upload for Event Notifications in the ePartnerViewer* User Guide which is located in the *Resource* section in the ePartnerViewer and under *ePartnerViewer* on the **KHIE website**.

2 Things you need to Know: Bulk Upload Patient Panels

1. Only *Event Notification Administrators* (*Administrators*) can upload a bulk list of patients for different users within the same organization to receive event notifications.

2. The **Event Notification Patient Panel Upload** template is downloadable and includes only the following fields required to execute the bulk upload:

- **Email address used to access ePartnerViewer**
- **Patient Last Name**
- **Patient First Name Patient DOB (MM/DD/YYYY)**
- **Patient Sex**

- **Patient Street Address**
- **Patient City**
- **Patient State**
- **Patient Zipcode**

3. *Administrators* must assign a specific user to EACH patient entered on the patient panel.

4. The title of the template changed from *Clinical Notification Patient List Upload* to *Event Notification Patient Panel Upload*.csv.

5. The *Upload File* section includes a new **Add Patients** radio button which allows you easily add new patient(s) to your panel, and a new **Delete Patients** radio button which allows you delete existing patient(s) from your panel.

> **Please Note**: To use these buttons, create a separate spreadsheet to **Add Patients** and a separate spreadsheet to **Delete Patients**.

6. The *Upload Patients* screen includes a new **Select Notifications** section which allows you easily select notifications for the patients on the patient panel.

> **Please Note**: Upon clicking **Delete Patients**, the *Select Notifications* section will be grayed out and the notification checkboxes will be disabled. The assigned user will no longer receive any event notifications for the existing patient(s) listed on the patient panel. To delete existing patient(s) from a patient panel, you must click **Delete Patients**, then click **Upload** to upload the appropriate patient panel.

3   How to Upload an Event Notification Bulk Patient Panel

Download the Event Notification Patient Panel Upload

1. Click the **Event Notifications Tab**.

2. Click the **Upload Patients Tab**.

3. Click the Download Template hyperlink: ***Event Notification Patient Panel Upload.csv***

4. Click the **Download Icon** at the bottom left of the screen to open the Excel file.

Enter Demographic Details for Each Patient

There is no limit to the number of patients that can be uploaded at once. You can upload the entire list of patients for the organization on one spreadsheet.

5. Enter the **Patient's Last Name** and **First Name**.

6. Enter the **Patient's Date of Birth** in MM/DD/YYYY format.

7. Enter the **Patient Sex**.

8. Enter the **Patient's Street Address**, **City**, **State**, and **Zip Code**.

9. Repeat the process of entering the demographic details for each patient until all patients have been added to the patient panel.

Assign Users to Each Patient

You must **assign a specific user to <u>EACH</u> patient** entered on the patient panel to either add patients or delete patients from the patient panel.

10. In Column A, enter the **email address the *Clinical User* uses to access the ePartnerViewer**.

Upload the Patient Panel

11. Click **File**, located at the top left of the patient panel file.

12. Click **Save As**.

13. The *Save As* pop-up displays. Select the **CSV UTF-8 (Comma delimited)(*.csv)** from the dropdown.

14. You can change the file name of the patient panel in the *File Name* field.

15. Click **Save** to save the patient panel on your computer.

16. Click **Browse** to find and upload the completed patient panel.

17. Select the patient panel from your computer.

18. Click **Open** to enter your completed patient panel.

19. Your patient panel will display in the box next to *Browse*.

If uploading a spreadsheet to *Add Patients* to the Patient Panel

20. Under the *Upload File* section, click **Add Patients** which is the default selection.

21. Under the *Select Notifications* section, select the **appropriate checkboxes** next to the event notification types that the User wishes to receive for each patient on the patient panel.

> **Please Note**: By default, the **Add Patients** radio button is pre-selected, and notification checkboxes within the *Select Notifications* section are enabled.

22. Click **Upload** to upload the completed patient panel.

23. The *Upload Patients* pop-up displays indicating the file was uploaded successfully. Click **OK** to proceed.

24. The uploaded patient panel appears in the *Uploaded Files List*.

If uploading a spreadsheet to *Delete Patients* from the Patient Panel

25. Under the *Upload File* section, click **Delete Patients**.

> **Please Note**: Upon clicking **Delete Patients**, the *Select Notifications* section will display grayed out and disabled notification checkboxes. This is because the assigned user will no longer receive any event notifications for the existing patient(s) listed on the patient panel.

26. Click **Upload** to upload the patient panel.

27. Click **OK** to proceed.

28. The Patient Panel displays in the *Uploaded Files List*.

> **Please Note**: The Event Notification Patient Panel Upload must meet the following criteria.
> If the patient panel Upload does **not** meet the criteria, the following errors will display:
> 1. The Event Notification Patient Panel Upload must be a .csv file type.
> - If the file is not a .csv file type, the following error message displays: "*Invalid file type uploaded, please upload a .csv file.*"
> 2. The patient panel must be under five (5) megabytes (MB) in size.
> - If the file exceeds five (5) MBs, the following error displays: *"Uploaded file exceeds the size limit of 5mb, please upload another file.*"
> 3. The filename of the patient panel must be under 100 characters.
> - If the filename is over 100 characters, the following error displays: *"The filename cannot exceed 100 characters, please name it appropriately."*
> 4. The patient panel must retain the defined headers (i.e., *Email Address used to access ePartnerViewer*, *Patient Last Name*, etc.) in the correct order.
> - If the headers are not in the correct order, the following error displays: *"Invalid file uploaded, please upload a valid file."*

4   Review Uploaded Patient Panels

The patient panel(s) previously uploaded displays in the *Uploaded Files List*.

Enhancements to the Uploaded Template

- The *Action* column indicates whether the *Administrator* clicked the **Add Patients** or the **Delete Patients** radio button when uploading a patient panel.

- The *Event Notifications* column displays the selected event notifications that the assigned user(s) will receive for the patient(s) listed on the patient panel.

- The *Download Response* column allows you to download a previously uploaded patient panel that has been fully processed to determine a patient panel was successfully processed or not.

Processing Status of Uploaded Patient Panels

1. Click the new ***Status* hyperlink** to see a description of each processing status.

2. The *Status* column displays the processing status of previously uploaded patient panel(s).

- The status will display as ***Pending*** until the upload has been fully processed.

- The status will display as ***Successful*** until the upload has been fully processed.

- The status will display as ***Partially Successful*** when only some of the patient records on the panel have been processed successfully. Event notifications will be generated only for the patient records that were processed successfully.

- The status will display as ***Unsuccessful*** when the panel does <u>not</u> meet the defined file structure or contains errors and could <u>not</u> be processed successfully.

> **Please Note:** On the **Manage Notifications** screen, when the uploaded patient panel has been successfully processed, each patient name from the panel will automatically display under the assigned user's *Existing Patients*.

Filter Previously Uploaded Patient Panel

1. Click **Apply Filter** to search for a specific previously uploaded patient panel.

2. Search by entering the ***Action***, ***File Name, Date Uploaded***, ***Date Processed***, ***Event Notifications, Status***, and/or the ***User*** in the corresponding Filter fields.

Download Previously Uploaded Patient Panels

You can review the status of a previously uploaded patient panel that has been fully processed to see the reason(s) the individual patient record(s) had errors.

1. Go to the *Uploaded Files List* section.

2. Click the **Download Icon** under the *Action* column.

> **Please Note**: Users cannot download the files for uploaded patient panels that have **not** been fully processed. The **Download Icon** is grayed out and disabled for patient panels and is marked as ***Pending***.

3. Click the **Download Icon** in the *Download Response* column; to open the file, click on the **excel file** located at the bottom left of your screen.

4. You can view the processing status for each individual patient record within the patient panel.

*   If all the patient records on the patient panel were processed successfully (i.e., ***Successful***), the status displays as ***Successful***.

    o The ***Success*** status displays for the patient record(s) that were processed successfully. The ***Error*** status displays for the patient record(s) that were not processed.

    o The **error description** displays to clarify the reason why the patient record(s) were not processed successfully.

5 Technical Support

Toll-Free Telephone Support

For questions and assistance regarding the ePartnerViewer, please call 1 (877) 651-2505.

Email Support

To submit questions or request support regarding the ePartnerViewer, please email KHIESupport@ky.gov or you can use the **Support Tab** located in the blue navigation bar at the top of the screen in the ePartnerViewer.