



Case Manager and Staff Usage Training

RelayHealth Personal Health Record (PHR) through Minnesota Department of Human Services

Overview: This document describes how Otter Tail County Case Managers and staff at participating partner provider organizations will use the Relay Health DHS Personal Health Record (PHR) in their day-to-day work with beneficiaries and Legal or authorized representatives. The initial onboarding and registration process for beneficiaries and legal representatives is handled by DHS.

The functionality for both Case Managers and other staff members is identical, although initial setup is different. Setup for Case Managers and other staff is done by RelayHealth or DHS, and is not addressed in this document.

NOTE (1): For use of the DHS Personal Health Record from a smartphone or other mobile device - There is not an app for this – the system works in Safari (iPhone) or any other browser on the smartphone or mobile device. Navigation is different due to the smaller screen size on the smartphone or mobile device compared to a computer screen. This is explained on the last page of this document.

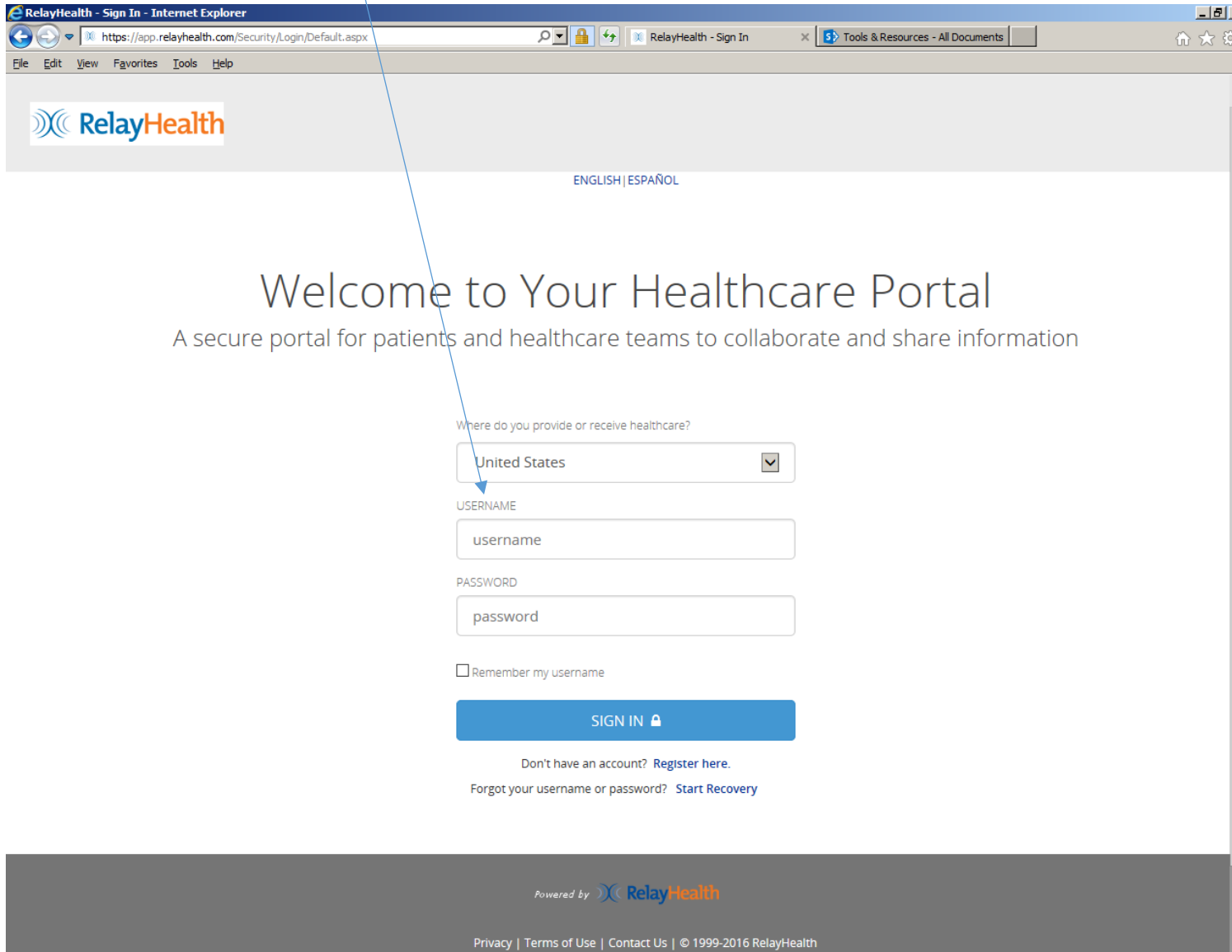
Note (2) – September 2017: after this training document was produced in June 2017, the organization names in the PHR were changed:

- from MN Department of Human Services – Otter Tail to Otter Tail County
- from MN Department of Human Services to Minnesota Department of Human Services

There is no change to the usage and views illustrated in the following pages; only the organization names are now different than what is shown in this document.

November 2017

The Otter Tail County Case Manager or Provider Partner staff member logs in to RelayHealth PHR at this link: <https://app.relayhealth.com/>



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This is the HOME page for the Practice Entity Portal (Provider) view, which is the same for Case Managers and for staff at partner provider organizations. The Case Manager's/staff person's name is displayed. In the AT-A-GLANCE example below, the user has access to multiple Inboxes (from All Inboxes), and has chosen to show three of them in "At a Glance". Staff access to inboxes will vary by organization.

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Click on All inboxes to see this view of all Inboxes to which the user belongs.

DEPARTMENT OF HUMAN SERVICES

Home Messages Results Patients

At a Glance **All Inboxes** Scheduled [Show Inbox Counts](#)

Below are all inboxes for the groups/teams you belong to. You have access to hyperlinked inboxes. [More](#)

Inbox

- MN Department of Human Services - Otter Tail
 - Practice Inbox
 - Elizabeth Bakken
 - Megan Barker, CCM
 - Shelly Bartels
 - Ms. Melanie Courier, CCM
 - Shannon Highland
 - Carla Johnson-Rownd
 - Jennifer Krueger
 - Ms. Jody Lien, CCM
 - Lane Magnusson
 - MN Department of Human Services - Otter Tail
 - Test Ottertail
 - Matthew Perrier
 - Laurie Sanders
 - Cheryl Wiskow
 - Catalina Adamez-Smith
 - RHTest DebRandels
 - Lisa Foster
 - Ilva Garelik

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Click on SCHEDULED for this view. Then click on the desired Inbox to see scheduled (but not yet sent) messages. In this view, there are no scheduled messages.

The screenshot shows the RelayHealth web application interface. At the top, there is a navigation bar with 'Home', 'Messages', 'Results', and 'Patients'. The 'Messages' tab is selected, and the 'Scheduled' view is active. The main content area displays a table of scheduled messages. The table has two columns: 'Outbox' and 'Scheduled Messages'. The 'Outbox' column lists various users, and the 'Scheduled Messages' column shows a count of 0 for each user. The users listed include Elizabeth Bakken, Megan Barker, CCM, Shelly Bartels, Ms. Melanie Courier, CCM, Shannon Highland, Caria Johnson-Rownd, Jennifer Krueger, Ms. Jody Lien, CCM, Lane Magnusson, MN Department of Human Services - Otter Tail, Test Ottertail, Matthew Perrier, Laurie Sanders, Cheryl Wiskow, Catalina Adamez-Smith, RHTest DebRandels, Lisa Foster, Ilya Garelik, and Rodney Gilbertson.

Outbox	Scheduled Messages
MN Department of Human Services - Otter Tail	
Elizabeth Bakken	0
Megan Barker, CCM	0
Shelly Bartels	0
Ms. Melanie Courier, CCM	0
Shannon Highland	0
Caria Johnson-Rownd	0
Jennifer Krueger	0
Ms. Jody Lien, CCM	0
Lane Magnusson	0
MN Department of Human Services - Otter Tail	0
Test Ottertail	0
Matthew Perrier	0
Laurie Sanders	0
Cheryl Wiskow	0
Catalina Adamez-Smith	0
RHTest DebRandels	0
Lisa Foster	0
Ilya Garelik	0
Rodney Gilbertson	0

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Continuing in the HOME page view, REMINDERS shows action needed by the user. PATIENT APPROVALS will list all requests from Legal or Authorized Representatives for access on behalf of a Beneficiary. Beneficiaries acting on their own behalf do not generate Patient Approval messages or action needed. Click on PATIENT APPROVALS to get the next screen.

The screenshot shows the RelayHealth web application interface. At the top, there is a navigation bar with 'Home', 'Messages', 'Results', and 'Patients'. Below this is a 'Patient Search' field and a 'Patient Enrollment' section with an 'Invite Patients' button. The 'What's New' section contains a message about the RelayHealth Community. The 'Quick Links' section includes 'webVisit® Interviews', 'New Referral Message', and 'Manage Practices'. The main content area is titled 'At a Glance' and includes an 'Inbox' table and a 'Reminders' section. The 'Inbox' table has columns for 'Results', 'Unopened/Total', and 'Overdue'. The 'Reminders' section lists 'Patient Approvals' (4), 'Messages you sent that have not been opened' (4), and 'Resolve Patient Records - Duplicates/Provisionals'. The RelayHealth logo is at the bottom, along with a disclaimer and copyright information.

	Results	Unopened/Total	Overdue
Kalaidis, Joe	-	31/44	0
Practice Inbox -- MN Department of Human Services - Otter Tail	-	0/19	0
MN Department of Human Services - Otter Tail	-	0/2	1

Reminder	Count
Patient Approvals	4
Messages you sent that have not been opened	4
Resolve Patient Records - Duplicates/Provisionals	

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Click on the desired hyperlink under SUBJECT to get the next screen.

The screenshot shows the RelayHealth web application interface. At the top, the browser address bar displays the URL: <https://app.relayhealth.com/Message/Inbox/PatientApprovalsSearch.aspx?sTab=2&Action=>. The page header includes the logo for the Minnesota Department of Human Services and navigation links for Data Administration, Settings, Help & Training, and Sign Out. The user's name, Joe Kalaidis, is displayed in the top right corner.

The main navigation bar contains links for Patient Search, Home, Messages, Results, and Patients. A sidebar on the left lists various message types and tools, including Patient Messages, Colleague Messages, and Tools.

The central area displays the title "Joe Kalaidis - Requests to Communicate Online" and a tabbed interface with "All Inboxes" selected. Below this is a table of messages:

		Patient/From	Subject	Group	Sent Date
<input type="checkbox"/>		Beneficiary Ottertail-N	Patient request to use RelayHealth	Otter Tail County	Wed 3/8/17 8:50 AM
<input type="checkbox"/>		DHS Test Eight	Patient request to use RelayHealth	MN Department of Human Services - Otter Tail	Wed 10/19/16 8:10 AM
<input type="checkbox"/>		DHS Test Two	Patient request to use RelayHealth	MN Department of Human Services - Otter Tail	Wed 10/19/16 8:05 AM
<input type="checkbox"/>		DHS Test One	Patient request to use RelayHealth	MN Department of Human Services - Otter Tail	Wed 10/19/16 8:03 AM

At the bottom of the message list, there are links for "Check All" and "Clear All", and a page indicator "Page 1 of 1". Below the table are buttons for "Archive" and "Print Copy for Chart".

At the bottom of the page, there is a footer with the RelayHealth logo, a disclaimer, and contact information: "Questions, comments, or suggestions? [Contact Us](#). © 1999 - 2015 RelayHealth and its affiliates. All rights reserved."

The browser's status bar at the very bottom shows the URL: <https://app.relayhealth.com/Message/ProviderMessageRead.aspx?mid=145983452>.

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Click ACCEPT or DECLINE as appropriate for the request. The request also can be assigned to a colleague for action. Generating a request is documented in the onboarding training document for Legal/Authorized Representatives.

The screenshot shows the RelayHealth Messaging interface in Internet Explorer. The browser address bar displays the URL: <https://app.relayhealth.com/Message/AcceptPatientMessageRead.aspx?PageMethod=Page>. The page header includes the Department of Human Services logo and navigation links for Data Administration, Settings, Help & Training, and Sign Out. The user name Joe Kalaidis is displayed. The main navigation bar contains links for Home, Messages, Results, and Patients. A search box labeled 'Patient Search' is present. On the left, there are buttons for View, Message History, Actions, and View Print Version. The central content area features a 'Patient Request to Use RelayHealth' notification with 'Accept', 'Decline', 'Assign to Colleague', and 'Close' buttons. A yellow warning box states: 'Locking a message is optional and can be used to indicate that you are taking responsibility to handle it. [Lock this Message](#). The provider you support has been added to this patient's list of providers. Please accept or decline this person as an active patient. This message will be automatically archived after you accept or decline this patient.' Below this is the 'Message Details' section with the following information: From: DHS Test Eight (On behalf of Patient DHS Test Eight); To: Test Ottertail; Provider: Test Ottertail; Patient: DHS Test Eight; Sent Date: Oct 19, 2016 8:10 AM; Subject: Patient request to use RelayHealth; Message: Please accept or decline this patient; DHS PMI: [input field]. A message summary bar shows 'Eight, DHS Test -- DOB Oct 31, 1931' with 'Never Updated' and 'View/Print' links. The 'Message Status' section includes fields for Status, Resolved Date, Internal Notes, and Print Confidential (No). At the bottom, there are 'Accept', 'Decline', 'Assign to Colleague', and 'Close' buttons. The footer contains the RelayHealth logo, a privacy notice, and a link to contact support.

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MESSAGING. Click to open the desired Inbox.

The screenshot shows the RelayHealth web application interface. At the top, there is a navigation bar with the logo for the Minnesota Department of Human Services and the user name 'Joe Kalaidis'. Below this is a main navigation menu with tabs for 'Home', 'Messages', 'Results', and 'Patients'. A 'Patient Search' input field is located to the left of the 'Home' tab. The 'Messages' tab is currently selected, and a sub-menu is open showing 'At a Glance', 'All Inboxes', and 'Scheduled'. The 'At a Glance' sub-menu is active, displaying an 'Inbox' table with columns for 'Results', 'Unopened/Total', and 'Overdue'. The table lists three inboxes: 'Kalaidis, Joe' (0 results, 41/58 unopened, 0 overdue), 'Practice Inbox -- MN Department of Human Services - Otter Tail' (0 results, 0/19 unopened, 0 overdue), and 'MN Department of Human Services - Otter Tail' (0 results, 0/5 unopened, 2 overdue). Below the inbox table, there is a 'Reminders' section with two items: 'Patient Approvals' (5) and 'Resolve Patient Records - Duplicates/Provisionals'. On the left side of the interface, there are several utility boxes: 'Patient Enrollment' with a link to 'Learn More' and an 'Invite Patients' button; 'What's New' with a link to 'RelayHealth Community'; and 'Quick Links' with links to 'webVisit@ Interviews', 'New Referral Message', and 'Manage Practices'. At the bottom of the page, there is a footer with the RelayHealth logo, a disclaimer, and contact information.

DEPARTMENT OF HUMAN SERVICES

Data Administration Settings Help & Training Sign Out
Joe Kalaidis

Patient Search Home Messages Results Patients

At a Glance All Inboxes Scheduled [Edit View](#)

Inbox	Results	Unopened/Total	Overdue
Kalaidis, Joe	-	41/58	0
Practice Inbox -- MN Department of Human Services - Otter Tail	-	0/19	0
MN Department of Human Services - Otter Tail	-	0/5	2

Reminders

- [Patient Approvals](#) 5
- [Resolve Patient Records - Duplicates/Provisionals](#)

webVisit@ Interviews
New Referral Message
Manage Practices

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Inbox unopened messages are shown as closed envelopes; previously opened messages are shown as open envelopes. Click on the hyperlink of the desired message to get the next screen for a sample message from a legal representative on behalf of a beneficiary of services.

The screenshot shows the RelayHealth web application interface. At the top, there is a navigation bar with tabs for 'Home', 'Messages', 'Results', and 'Patients'. Below this is a search bar and a list of message categories. The main area displays an email inbox for 'Kalaidis, Joe'. The inbox table has columns for 'Patient/From', 'Subject', 'Group', and 'Sent Date'. The message 'RE: Sample message in PHR' is highlighted with a blue arrow pointing to its subject line.

	Patient/From	Subject	Group	Sent Date
<input checked="" type="checkbox"/>	Ilya Garelik	test	Otter Tail County	May 09, 2017 2:54 PM
<input type="checkbox"/>	Ilya Garelik	test	MN Department of Human Services - Otter Tail	May 09, 2017 2:54 PM
<input type="checkbox"/>	Catalina Adamez-Smith	RE: RE: RE: Dummy Beneficiary Account	Otter Tail County	Apr 18, 2017 11:55 AM
<input type="checkbox"/>	Joe Kalaidis	RE: RE: Dummy Beneficiary Account	Otter Tail County	Apr 18, 2017 10:44 AM
<input type="checkbox"/>	Joe Kalaidis	RE: RE: Dummy Beneficiary Account	MN Department of Human Services - Otter Tail	Apr 18, 2017 10:44 AM
<input type="checkbox"/>	Mrs. Diane Thorson	RE: Dummy Beneficiary Account	Otter Tail County	Apr 18, 2017 9:07 AM
<input type="checkbox"/>	Mrs. Diane Thorson	RE: Dummy Beneficiary Account	MN Department of Human Services - Otter Tail	Apr 18, 2017 9:07 AM
<input type="checkbox"/>	Beneficiary Ottertail-R	RE: Sample message in PHR	MN Department of Human Services - Otter Tail	Apr 06, 2017 10:28 AM
<input type="checkbox"/>	RelayHealth System	Admin Rights Notification	Otter Tail County	Apr 03, 2017 10:19 AM
<input type="checkbox"/>	Ilya Garelik	Dummy Beneficiary Account	Otter Tail County	Mar 29, 2017 2:25 PM
<input type="checkbox"/>	Ilya Garelik	Dummy Beneficiary Account	MN Department of Human Services - Otter Tail	Mar 29, 2017 2:25 PM
<input type="checkbox"/>	Ilya Garelik	Requested Action #5 for Case Managers/Provider Staff	Otter Tail County	Mar 20, 2017 8:28 AM
<input type="checkbox"/>	Ilya Garelik	Requested Action #5 for Case Managers/Provider Staff	MN Department of Human Services - Otter Tail	Mar 20, 2017 8:28 AM
<input type="checkbox"/>	RelayHealth System	New group member	Otter Tail County	Mar 17, 2017 1:42 PM

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As appropriate, click on REPLY, ASSIGN TO COLLEAGUE, or ARCHIVE to act on this message. Note that messages can be archived but are never deleted.

Click Close to leave it in the Inbox without acting on it. Click REPLY TO PATIENT to get the next screen.

RelayHealth - Messaging - Internet Explorer

https://app.relayhealth.com/Message/ProviderMessageRead.aspx?mid=159311777

DEPARTMENT OF HUMAN SERVICES

Data Administration Settings Help & Training Sign Out Joe Kalaidis

Home Messages Results Patients

View Message History Actions View Print Version

Consultation

Reply To Patient Assign to Colleague Archive Close

Locking a message is optional and can be used to indicate that you are taking responsibility to handle it. [Lock this Message.](#)

Message Details

From: Legalrepfor Ottetail-R
On behalf of Patient Beneficiary Ottetail-R
This patient's RelayHealth account is linked to that of a primary account holder and the primary account holder will be able to view all information about the patient and to message on the patient's behalf. Please ensure that the primary account holder is legally entitled to view the patient's information and to make decisions about the collection, use, and disclosure of the patient's personal health information.

To: Joe Kalaidis

Provider: Ms. Jody Lien CCM

Patient: Beneficiary Ottetail-R

Sent Date: Apr 06, 2017 10:28 AM

Subject: RE: Sample message in PHR

Message: Enter reply to message here.

Ottetail-R, Beneficiary -- DOB Jan 01, 1950 Last Updated Apr 7, 2017 [View/Print](#)

Message Thread

Message Status [Edit](#)

Status

Resolved Date

Internal Notes

Print Confidential No

Reply To Patient Assign to Colleague Archive Close

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This is the sample REPLY TO PATIENT screen. Fill in the message text, and if desired, click on ADD/DELETE FILES to attach files (documents) to the message. Click or unclick options as desired, then click SEND TO PATIENT.

The screenshot displays the RelayHealth Messaging interface in Internet Explorer. The browser address bar shows the URL: <https://app.relayhealth.com/Message/Draft/MessageDraft.aspx?testResult=8mid=1614059>. The page header includes the Department of Human Services logo and navigation links: Data Administration, Settings, Help & Training, and Sign Out. The user's name, Joe Kalaidis, is displayed in the top right corner.

The main navigation bar contains a Patient Search field and tabs for Home, Messages, Results, and Patients. A left-hand menu is expanded to show the 'Attach' section, which includes options like Add/Delete Files, webVisit, Appointment Request, Web Link, and PreVisit Update. The 'Reply to Patient' form is the central focus, containing the following fields and options:

- From:** Joe Kalaidis, On behalf of Ms. Jody Lien CCM, MN Department of Human Services - Otter Tail
- To Patient:** Legalrepfor Ottertail-R, On behalf of Patient Beneficiary Ottertail-R - DOB: Jan 1, 1950. A red warning message states: "This patient's RelayHealth account is linked to that of a primary account holder and the primary account holder will be able to view all information about the patient and to message on the patient's behalf. Please ensure that the primary account holder is legally entitled to view the patient's information and to make decisions about the collection, use, and disclosure of the patient's personal health information."
- CC FYI:** Add
- CC Action:** Add
- Subject:** RE: RE: Sample message in PHR
- Message:** A large text area for composing the message, with a blue arrow pointing to it from the 'Attach' menu.
- Message Thread:** A section for managing the message thread.
- Internal Notes:** A text area for adding internal notes.
- Options:** A section for configuring message options, including a notification timer (set to 0 days) and checkboxes for Confidentiality, Care Reminders, Archiving, and allowing replies.

At the bottom of the form, there are three buttons: Send to Patient, Forward Draft to Colleague, and Cancel.

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To send a new message: From an Inbox, click on PATIENT MESSAGE to send a message to a beneficiary or legal representative, or COLLEAGUE MESSAGE to send a message to a co-worker or staff member at a partner organization.

RelayHealth - Inbox Messages - Internet Explorer

https://app.relayhealth.com/Message/Inbox/ProviderInboxSearch.aspx?Tab=1&mkey=101

File Edit View Favorites Tools Help

DEPARTMENT OF HUMAN SERVICES

Data Administration Settings Help & Training Sign Out Joe Kalaidis

Patient Search Home Messages Results Patients

Kalaidis, Joe - Inbox

At a Glance All Inboxes Scheduled Advanced Search

Inbox Kalaidis, Joe Folder Inbox

	Patient/From	Subject	Group	Sent Date
<input type="checkbox"/>	Ilya Garelik	test	Otter Tail County	May 09, 2017 2:54 PM
<input type="checkbox"/>	Ilya Garelik	test	MN Department of Human Services - Otter Tail	May 09, 2017 2:54 PM
<input type="checkbox"/>	Catalina Adamez-Smith	RE: RE: RE: Dummy Beneficiary Account	Otter Tail County	Apr 18, 2017 11:55 AM
<input type="checkbox"/>	Joe Kalaidis	RE: RE: Dummy Beneficiary Account	Otter Tail County	Apr 18, 2017 10:44 AM
<input type="checkbox"/>	Joe Kalaidis	RE: RE: Dummy Beneficiary Account	MN Department of Human Services - Otter Tail	Apr 18, 2017 10:44 AM
<input type="checkbox"/>	Mrs. Diane Thorson	RE: Dummy Beneficiary Account	Otter Tail County	Apr 18, 2017 9:07 AM
<input type="checkbox"/>	Mrs. Diane Thorson	RE: Dummy Beneficiary Account	MN Department of Human Services - Otter Tail	Apr 18, 2017 9:07 AM
<input type="checkbox"/>	Beneficiary Ottertail-R	RE: Sample message in PHR	MN Department of Human Services - Otter Tail	Apr 06, 2017 10:28 AM
<input type="checkbox"/>	RelayHealth System	Admin Rights Notification	Otter Tail County	Apr 03, 2017 10:19 AM
<input type="checkbox"/>	Ilya Garelik	Dummy Beneficiary Account	Otter Tail County	Mar 29, 2017 2:25 PM
<input type="checkbox"/>	Ilya Garelik	Dummy Beneficiary Account	MN Department of Human Services - Otter Tail	Mar 29, 2017 2:25 PM
<input type="checkbox"/>	Ilya Garelik	Requested Action #5 for Case Managers/Provider Staff	Otter Tail County	Mar 20, 2017 8:28 AM
<input type="checkbox"/>	Ilya Garelik	Requested Action #5 for Case Managers/Provider Staff	MN Department of Human Services - Otter Tail	Mar 20, 2017 8:28 AM
<input type="checkbox"/>	RelayHealth System	New group member	Otter Tail County	Mar 17, 2017 1:42 PM

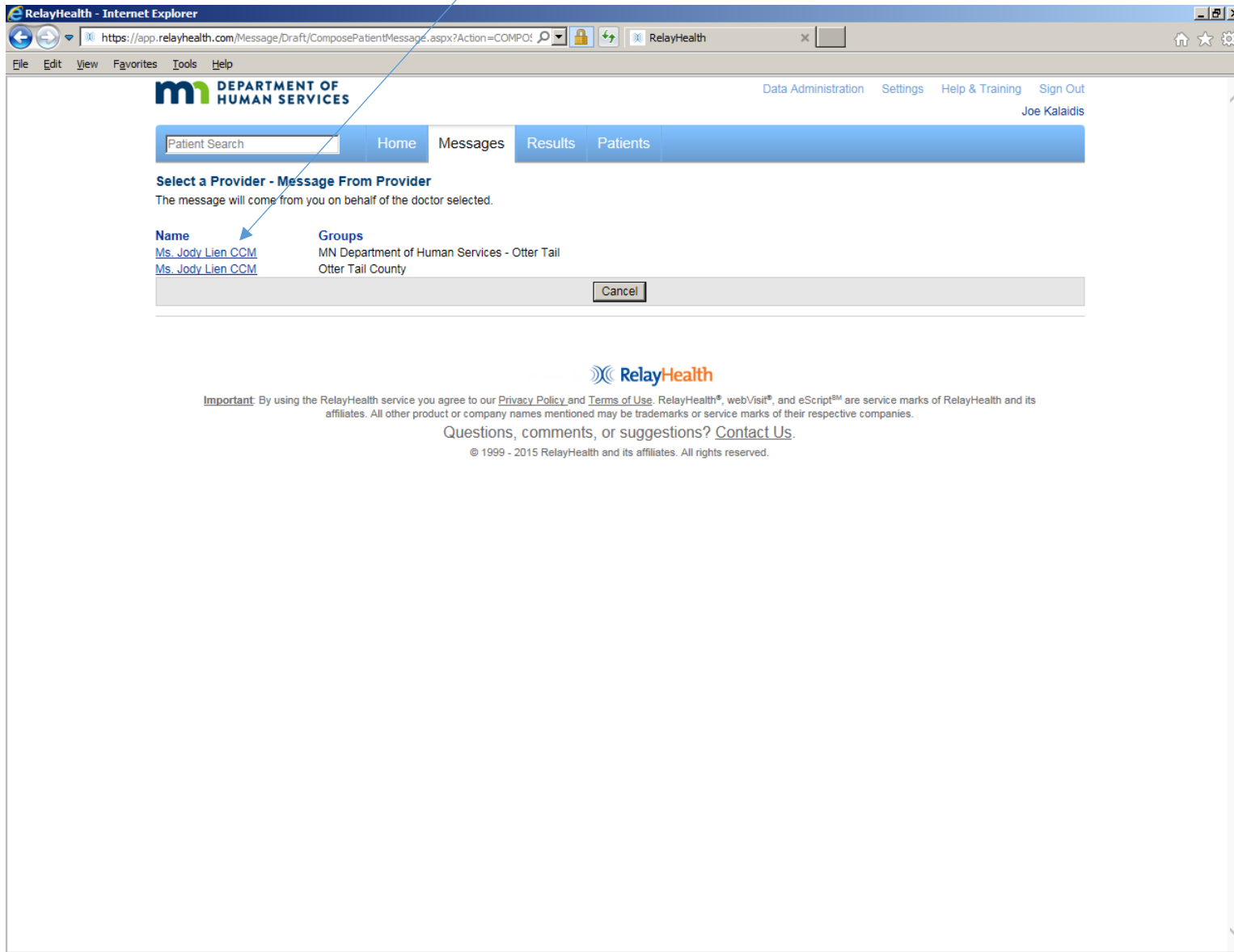
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This is a sample new message to Patient (Beneficiary). Enter all or part of the Patient's (Beneficiary's) first name or last name in the TO PATIENT window, then click in the resulting Patient (Beneficiary) information window.

The screenshot displays the RelayHealth Messaging interface in Internet Explorer. The browser address bar shows <https://app.relayhealth.com/Message/Draft/MessageDraft.aspx>. The page header includes the Department of Human Services logo and navigation links for Data Administration, Settings, Help & Training, and Sign Out. The user is identified as Joe Kalaidis. The main navigation bar contains Home, Messages, Results, and Patients. A left sidebar lists various actions like 'Add/Delete Files', 'Appointment Request', and 'PreVisit Update'. The central area is titled 'New Message to Patient' and features a 'To Patient' field with a dropdown menu. The dropdown is open, showing 'Beneficiary Ottertail-R' selected, with additional details: 'Male', 'Jody Lien', and 'Online'. Below this are fields for 'CC FYI', 'CC Action', and 'Subject'. A large text area is provided for the message content, with options for 'Tx Options', 'Msg Template', 'Lab/Test Results', 'Spell Check', and 'Appt Reminders'. An 'Internal Notes' section is also present. At the bottom, there are checkboxes for 'Options' and buttons for 'Send to Patient', 'Forward Draft to Colleague', and 'Cancel'. The footer contains the RelayHealth logo, an important notice, and copyright information for 1999-2015.

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For staff members, click on the case manager or provider name on whose behalf the message is being sent. Note that case managers are listed twice – Otter Tail County and Minnesota DHS. Either entry can be selected.



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Fill in Subject, Message text, Options if appropriate, then click SEND TO PATIENT.

The screenshot shows the RelayHealth Messaging interface in Internet Explorer. The browser address bar shows the URL: <https://app.relayhealth.com/Message/Draft/MessageDraft.aspx?mid=161577813>. The page title is "RelayHealth - Messaging".

The interface includes a navigation menu with "Home", "Messages", "Results", and "Patients". The "Messages" tab is selected. The "DEPARTMENT OF HUMAN SERVICES" logo is visible in the top left. The user's name, "Joe Kalaidis", is displayed in the top right.

The main content area is titled "New Message to Patient". It contains the following fields and options:

- From:** Joe Kalaidis
On behalf of Ms. Jody Lien CCM, Otter Tail County
- To Patient *:** Legalrepfor Ottertail-R
On behalf of Patient Beneficiary Ottertail-R - DOB: Jan 1, 1950
This patient's RelayHealth account is linked to that of a primary account holder and the primary account holder will be able to view all information about the patient and to message on the patient's behalf. Please ensure that the primary account holder is legally entitled to view the patient's information and to make decisions about the collection, use, and disclosure of the patient's personal health information.
- CC FYI:** [Add](#)
- CC Action:** [Add](#)
- Subject *:**
- Message:**
Options: [Tx Options](#) [Msg Template](#) [Lab/Test Results](#) [Spell Check](#) [Appt Reminders](#)
- Internal Notes:**
- Options:**
 - Notify me if unopened after days
 - Mark printed copies of this message as Confidential
 - Mark this message as a "Care Reminder"
 - Allow patient replies to thread

At the bottom of the form, there are three buttons: "Send to Patient", "Forward Draft to Colleague", and "Cancel".

At the bottom of the page, there is a footer with the RelayHealth logo and a disclaimer: "Important: By using the RelayHealth service you agree to our Privacy Policy and Terms of Use. RelayHealth®, webVisit®, and eScript® are service marks of RelayHealth and its affiliates. All other product or company names mentioned may be trademarks or service marks of their respective companies. Questions, comments, or suggestions? Contact Us."

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This is the confirmation that the message was sent.

The screenshot shows an Internet Explorer browser window with the address bar displaying <https://app.relayhealth.com/Message/Draft/MessageDraft.aspx?mid=161577813>. The page header includes the 'DEPARTMENT OF HUMAN SERVICES' logo and navigation links for 'Data Administration', 'Settings', 'Help & Training', and 'Sign Out'. The user is identified as 'Joe Kalaidis'. A navigation bar contains 'Patient Search', 'Home', 'Messages', 'Results', and 'Patients'. The main content area features a blue checkmark icon and the heading 'Message Delivered'. Below this, it states: 'Message: **Sample message** has been delivered. To: Beneficiary Ottertail-R on May 12, 2017 9:43 AM'. There are two links: 'Create a Followup Message about Beneficiary Ottertail-R' and 'Print Message Thread'. A 'Back to Inbox' button is located at the bottom of the message content. The footer contains the RelayHealth logo, an important notice about service marks, a 'Contact Us' link, and a copyright notice: '© 1999 - 2015 RelayHealth and its affiliates. All rights reserved.'

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To view SENT or DRAFT or ARCHIVE messages, click on the desired folder.

The screenshot shows the RelayHealth web application interface. At the top, there is a navigation bar with the logo for the Department of Human Services and links for Data Administration, Settings, Help & Training, and Sign Out. Below this is a secondary navigation bar with tabs for Home, Messages, Results, and Patients. A search bar is located on the left side of the Messages tab.

The main content area is titled "Kalaidis, Joe - Inbox". It features a sub-navigation bar with "At a Glance", "All Inboxes", and "Scheduled" tabs. Below this is a table of messages. The table has columns for "Patient/From", "Subject", "Folder", and "Sent Date". A dropdown menu for the "Folder" column is open, showing options: "Inbox", "Sent", "Draft", and "Archive".

	Patient/From	Subject	Folder	Sent Date
<input type="checkbox"/>	Ilya Garelik	test	Otter Tail County	May 09, 2017 2:54 PM
<input type="checkbox"/>	Ilya Garelik	test	MN Department of Human Services - Otter Tail	May 09, 2017 2:54 PM
<input type="checkbox"/>	Catalina Adamez-Smith	RE: RE: RE: Dummy Beneficiary Account	Otter Tail County	Apr 18, 2017 11:55 AM
<input type="checkbox"/>	Joe Kalaidis	RE: RE: Dummy Beneficiary Account	Otter Tail County	Apr 18, 2017 10:44 AM
<input type="checkbox"/>	Joe Kalaidis	RE: RE: Dummy Beneficiary Account	MN Department of Human Services - Otter Tail	Apr 18, 2017 10:44 AM
<input type="checkbox"/>	Mrs. Diane Thorson	RE: Dummy Beneficiary Account	Otter Tail County	Apr 18, 2017 9:07 AM
<input type="checkbox"/>	Mrs. Diane Thorson	RE: Dummy Beneficiary Account	MN Department of Human Services - Otter Tail	Apr 18, 2017 9:07 AM
<input type="checkbox"/>	Beneficiary Ottertail-R	RE: Sample message in PHR	MN Department of Human Services - Otter Tail	Apr 06, 2017 10:28 AM
<input type="checkbox"/>	RelayHealth System	Admin Rights Notification	Otter Tail County	Apr 03, 2017 10:19 AM
<input type="checkbox"/>	Ilya Garelik	Dummy Beneficiary Account	Otter Tail County	Mar 29, 2017 2:25 PM
<input type="checkbox"/>	Ilya Garelik	Dummy Beneficiary Account	MN Department of Human Services - Otter Tail	Mar 29, 2017 2:25 PM
<input type="checkbox"/>	Ilya Garelik	Requested Action #5 for Case Managers/Provider Staff	Otter Tail County	Mar 20, 2017 8:28 AM
<input type="checkbox"/>	Ilya Garelik	Requested Action #5 for Case Managers/Provider Staff	MN Department of Human Services - Otter Tail	Mar 20, 2017 8:28 AM
<input type="checkbox"/>	RelayHealth System	New group member	Otter Tail County	Mar 17, 2017 1:42 PM

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Scheduled Messages: from MESSAGES, click on SCHEDULED to get this screen.

RelayHealth - Scheduled Messages - Internet Explorer

https://app.relayhealth.com/Message/ScheduledMessageSearch.aspx?sTab=3&mkey=1010

DEPARTMENT OF HUMAN SERVICES

Data Administration Settings Help & Training Sign Out Joe Kalaidis

Patient Search Home Messages Results Patients

Schedule a Message

To Myself

To Colleague

To Patient

Kalaidis, Joe - Scheduled Messages

At a Glance All Inboxes Scheduled Advanced Search

Scheduled By Kalaidis, Joe

Delivery Date	To	Role	Subject
<input type="checkbox"/> Jun 06, 2017	Beneficiary Ottertail-R	Patient	Meeting on June 8, 2017

Check All - Clear All Page 1 of 1

Print Cancel Delivery of Checked Messages

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https://app.relayhealth.com/Message/ScheduledMessageSearch.aspx?sTab=3&mkey=101035499

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Click on the hyperlink in SUBJECT to edit the scheduled message, including delivery date.

Click PRINT or CANCEL DELIVERY if desired.

RelayHealth - Scheduled Messages - Internet Explorer

https://app.relayhealth.com/Message/ScheduledMessageSearch.aspx?Tab=3&mkey=1010

DEPARTMENT OF HUMAN SERVICES

Data Administration Settings Help & Training Sign Out Joe Kalaidis

Home Messages Results Patients

Schedule a Message

To Myself

To Colleague

To Patient

Kalaidis, Joe - Scheduled Messages

At a Glance All Inboxes Scheduled Advanced Search

Scheduled By Kalaidis, Joe

	Delivery Date	To	Role	Subject
<input type="checkbox"/>	Jun 06, 2017	Beneficiary Ottertail-R	Patient	Meeting on June 8, 2017

Check All - Clear All Page 1 of 1

Print Cancel Delivery of Checked Messages

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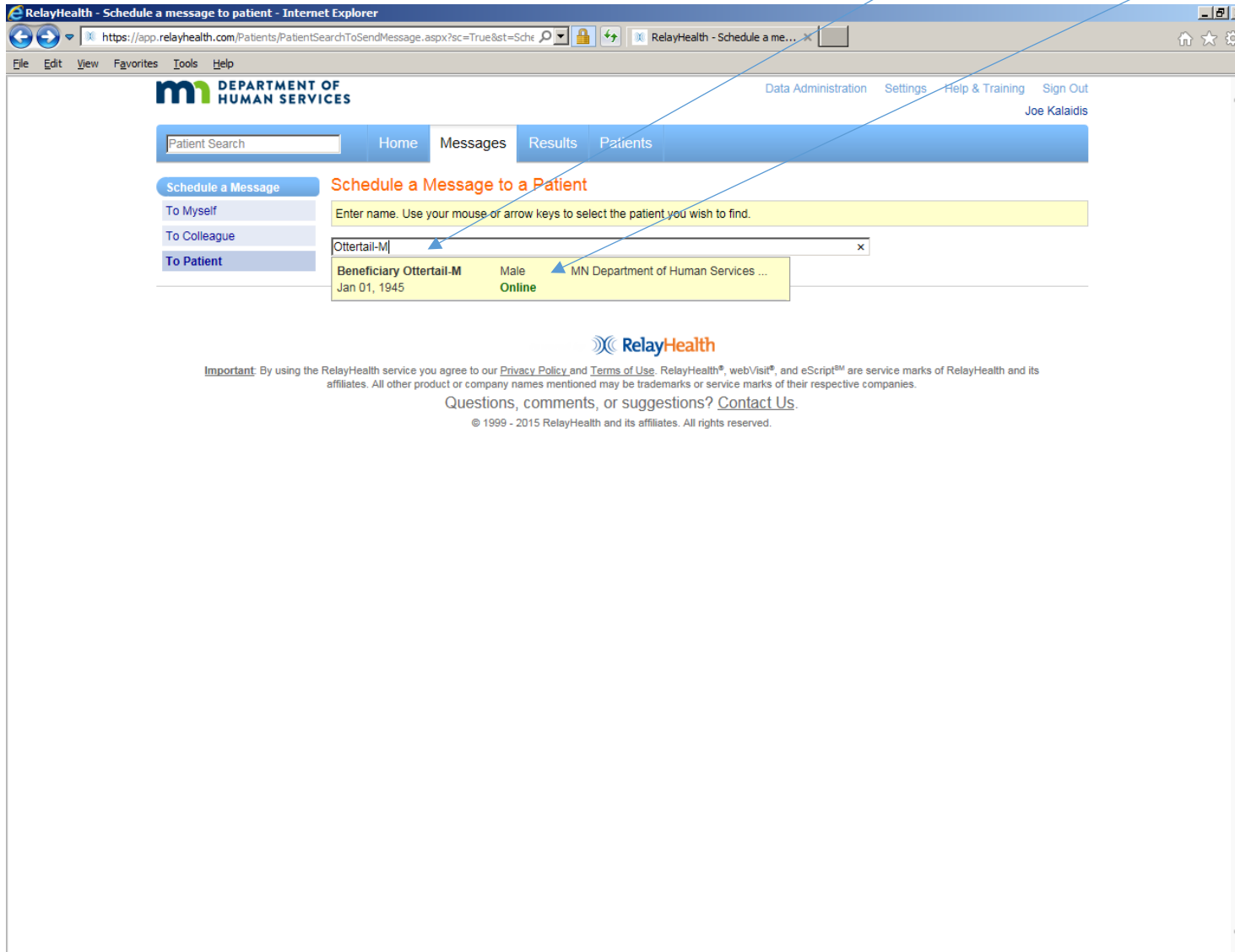
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https://app.relayhealth.com/Message/ScheduledMessageSearch.aspx?Tab=3&mkey=101035499

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Scheduling a new message to be sent: Click on MESSAGES then SCHEDULED to get this screen. Enter all or part of the first name or last name in the search window. This is an example of a Patient Message to Beneficiary (first name) Ottertail-M (last name). Then click in the Patient Information window to get the next screen.



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Fill in the message information, including Delivery Date, then click SCHEDULE MESSAGE to get the next screen.

The screenshot shows the RelayHealth Messaging interface in Internet Explorer. The browser address bar shows the URL: <https://app.relayhealth.com/Message/Draft/MessageDraft.aspx?mid=161579434&st=2>. The page header includes the Department of Human Services logo and navigation links: Data Administration, Settings, Help & Training, and Sign Out (Joe Kalaidis). The main navigation bar has tabs for Home, Messages, Results, and Patients. A left sidebar contains various actions like 'View', 'Your Message', 'Patient Face Sheet', 'Attach', and 'Actions'. The main content area is titled 'New Message to Patient' and contains the following form fields:

- From:** Joe Kalaidis
On behalf of Ms. Jody Lien CCM, MN Department of Human Services - Otter Tail
- To Patient:** Beneficiary Otttertail-O - DOB: Jan 1, 1950
- CC FYI:** [Add](#)
- CC Action:** [Add](#)
- Delivery Date:** Now Scheduled 5/24/2017 (mm/dd/yyyy)
- Subject:** Meeting Reminder
- Message:** [Tx Options](#) [Msg Template](#) [Lab/Test Results](#) [Spell Check](#)
Just a reminder for our meeting on June 1, 2017 @ 10am. See you then!
- Internal Notes:** (Empty text area)
- Options:** Notify me if unopened after days
 - Mark printed copies of this message as Confidential
 - Mark this message as a "Care Reminder"
 - Allow patient replies to thread

At the bottom of the form are three buttons: 'Schedule Message', 'Forward Draft to Colleague', and 'Cancel'. The footer contains the RelayHealth logo and a disclaimer: 'Important: By using the RelayHealth service you agree to our Privacy Policy and Terms of Use. RelayHealth®, webVisit®, and eScript™ are service marks of RelayHealth and its affiliates. All other product or company names mentioned may be trademarks or service marks of their respective companies. Questions, comments, or suggestions? Contact Us. © 1999 - 2015 RelayHealth and its affiliates. All rights reserved.'

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This is the confirmation that message was scheduled.

The screenshot shows a web browser window titled "RelayHealth - Messaging - Internet Explorer". The address bar contains the URL: <https://app.relayhealth.com/Message/Draft/MessageDraft.aspx?mid=161407656&st=2>. The browser's menu bar includes "File", "Edit", "View", "Favorites", "Tools", and "Help".

The web application header features the "DEPARTMENT OF HUMAN SERVICES" logo on the left and navigation links for "Data Administration", "Settings", "Help & Training", and "Sign Out" on the right. The user name "Joe Kalaidis" is displayed in the top right corner. Below the header is a navigation bar with a "Patient Search" input field and buttons for "Home", "Messages", "Results", and "Patients".

The main content area displays a confirmation message:

- A blue checkmark icon in a box.
- Message Scheduled**
- Message: **Meeting on May 25, 2017** has been scheduled for delivery
- To: Beneficiary Ottertail-M
- On: May 23, 2017

Below the message are three buttons: "Go to Scheduled Messages", "Go to Inbox", and "Print Message Thread".

At the bottom of the page, the RelayHealth logo is centered. Below it is an **Important** notice: "By using the RelayHealth service you agree to our [Privacy Policy](#) and [Terms of Use](#). RelayHealth®, webVisit®, and eScript™ are service marks of RelayHealth and its affiliates. All other product or company names mentioned may be trademarks or service marks of their respective companies." Below this notice is a link: "Questions, comments, or suggestions? [Contact Us](#)." At the very bottom, a copyright notice reads: "© 1999 - 2015 RelayHealth and its affiliates. All rights reserved."

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RESULTS MANAGER: This functionality will not be used in the initial rollout of the RelayHealth PHR in the Otter Tail Collaborative.



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Click on PATIENTS to get this screen.

Then enter all or part of the Patient's (Beneficiary's) first name or last name in the Search window.

Then click in the Patient Information window to get the next screen.

RelayHealth - View Patient - Internet Explorer
https://app.relayhealth.com/Patients/ViewPatient.aspx

DEPARTMENT OF HUMAN SERVICES
Data Administration Settings Help & Training Sign Out
Joe Kalaidis

Home Messages Results Patients

View
Find a Patient
Sent Invitations
Upload Patient Data
Enrollment Reports
Appointment Reminders
Patient Record Manager

Actions
Invite Patients
Build Patient List
Manage Keywords/Groups
Review Email Templates
Review Email Settings

Find a Patient
Enter name or Patient ID. Use your mouse or arrow keys to select the patient you wish to find.

Ottertail-R
Beneficiary Ottertail-R Male Jody Lien
Jan 01, 1950 Online

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This is the Beneficiary (patient) summary information screen as viewed by the Case Manager or Provider Partner staff member. The information shown in the lower half of the screen is the same as in the Beneficiary or Legal Representative view, although the look and navigation are different. Beneficiaries or their representatives may choose to use functions such as problems, medications, allergies, etc. If so, that information will be displayed as in the example below. Those items also will be updated automatically from Continuity of Care Documents from partner organizations. The main functionality we will use in the TEFT PHR demonstration project is FILES. This item is called DOCUMENTS in the Beneficiary (Patient) view. Click on FILES to get the next screen.

RelayHealth - Clinical Summary - Internet Explorer

https://app.relayhealth.com/Patients/PHR/Summary.aspx?ptid=114397359

DEPARTMENT OF HUMAN SERVICES

Data Administration Settings Help & Training Sign Out Joe Kalaidis

Patient Search Home Messages Results Patients

Name: Beneficiary Ottertail-R (dependent) Home: 952-486-1201 DHS PMI: Online Work: Health Plan: Edit
Gender: Male Mobile: Health Plan Id:
Date of Birth: Jan 1, 1950

Chart Administrative Actions - Select -

Summary Messages Problems & Proc. Medications Allergies Results Vital Signs Immunizations Family & Social Hx Files

Messages [New](#)

Subject	Date
Note to Office	Apr 6, 2017
RE: Sample message in PHR	Apr 6, 2017
Note to Office	Mar 15, 2017
RE: Sample message in PHR	Mar 15, 2017

Active Medications [New Med](#)

Drug	Medication and Insurance Coverage Details	Action
Aspirin Adult Low Strength (Aspirin)	Oral Tablet Chewable 81 MG	Edit

Results [New](#)

No results in last 6 months

Notifications

Possible Network Record Matches: 0

Possible Duplicate Record Matches: 0

Problems [New](#)

No problems recorded. You may confirm this patient has [no known problems](#).

Allergies: Medication [New](#)

No allergies specified. You may confirm this Patient has [no known medication allergies](#).

Consents

Receive Surescripts Medication history

Share Patient Record outside of Practice

Share Immunization data with State Registry

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This is an example of how FILES (DOCUMENTS) appear in the Case Manager/Provider staff view. All documents have their source identified, because multiple organizations can upload documents. In the example below, all documents show as VISIBLE TO PATIENT (beneficiary). If another source uploads files (Case Manager or Provider organization staff), the source can choose to make them not visible to the patient (beneficiary).

To view a File (document), click on its link under FILENAME. To add or delete a File, click ADD/DELETE FILES TO HEALTH RECORD.

The screenshot shows the RelayHealth interface for a patient named Beneficiary Ottetail-R (dependent). The patient's profile includes contact information (Home: (952)486-1201, Work: Mobile), health plan details (SELF PAY), and a profile picture. Below the profile is a navigation menu with tabs for Summary, Messages, Problems & Proc., Medications, Allergies, Results, Vital Signs, Immunizations, Family & Social Hx, and Files. The Files tab is selected, displaying a table of documents. The table has columns for Filename, Associated Information, Source, Visible to Patient, Comments, and Date Processed. The files listed include a sample PDF profile page, a blank document, a document from Lake Region Healthcare, a frequently asked questions document, a sample form, a sample profile page, and a service agreement letter.

Filename	Associated Information	Source	Visible to Patient	Comments	Date Processed
SAMPLE_PDF_Profile_Page.pdf	Inbound Document	Legalrepor Ottetail-R	Yes	New Minnesota DHS Profile page	Nov 09, 2017 09:08:49, UTC-6
Personal Profile Page BLANK.docx	Message	Ilya Garelik	Yes	Requested action #12	Sep 19, 2017 16:26:29, UTC-6
AB3ABCAE-E0AC-4392-97FD-D8A5027B1C41*2.16.840.1.113883.3.271.274898.20170609090412.xml	Inbound Document	Lake Region Healthcare	Yes		Jun 09, 2017 09:04:26, UTC-6
Minnesota PHR User Survey Frequently Asked Questions (FAQ).docx	Message	Ilya Garelik	Yes	PHR User Survey	May 15, 2017 15:30:37, UTC-6
Advanced Directive sample form.pdf	Inbound Document	Joe Kalaidis	Yes		May 10, 2017 11:34:21, UTC-6
SAMPLE PnR Profile Page 3-22-17.pdf	Inbound Document	Joe Kalaidis	Yes	This is a sample DHS Profile	May 10, 2017 09:58:12, UTC-6
EWServiceAgreementLettersRecipient.pdf	Inbound Document	Legalrepor Ottetail-R	Yes		Apr 07, 2017 08:18:45, UTC-6

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This is a sample of the Minnesota DHS Profile page that was developed for the TEFT PHR project.

mn DEPARTMENT OF HUMAN SERVICES

Long Term Services and Supports Profile Page

NOTE: This summary is provided by the MN Department of Human Services for informational purposes only. Please contact your Case Manager if you have questions about this information.

Data matches DHS systems as of June 10, 2016.

<u>Beneficiary Information</u> Name: James L. Gibson Address: 1524 Oak Avenue Apt #25 St. Paul, MN 55164-1234 Date of Birth: 04/06/1950 Age: 66 Gender: Male Primary Language: Not Available Phone Number: 444-444-1212 Authorized Rep. : Lisa R. Gibson	<u>LTSS Program</u> Program: Medical Assistance (MA) Begin Date: 01/01/2017 End Date: 12/31/2017 Waiver: Community Access for Disability Inclusion (CADi) Begin Date: 03/01/2017 End Date: 12/31/2017 Annually Required Eligibility Reassessment Date: 11/01/2017
<u>Case Manager</u> Name: Mary Jones Employer: Otter Tail County Phone Number: 555-555-1212	<u>Financial Worker</u> Name: John Smith Employer: Otter Tail County Phone Number: 555-555-1215

To add a FILE:

1. Browse to find the File on your local computer.
2. Set VISIBLE TO PATIENT to NO if desired (YES is the default).
3. Click UPLOAD to get the next screen.

DEPARTMENT OF HUMAN SERVICES

RelayHealth - Add File to Health Record - Internet Explorer

https://app.relayhealth.com/Patients/PHR/File/ProviderAddFileAttachment_V2.aspx?ptid=11

Data Administration Settings Help & Training Sign Out
Joe Kalaidis

Patient Search Home Messages Results Patients

Name: Beneficiary Ottertail-R (dependent) Home: 952-486-1201 DHS PMI: Online
Gender: Male Work: Health Plan: Edit
Date of Birth: Jan 1, 1950 Mobile: Health Plan Id: REPORT

Add File to Health Record

File attachments are stored on the Patient Record and available to the patient unless visibility is set to no, below.

Visible to Patient Yes No

FileName * Browse...
5MB max. All files are scanned for viruses (view [disclaimer](#)).

Comments

Upload

Files

Filename	Associated Information	Source	Visible to Patient	Comments	Size
EWSserviceAgreementLettersRecipient.pdf	Health Record	Legalrepor Ottertail-R	Yes		271.25 KB Delete
SAMPLE PnR Profile Page 3-22-17.pdf	Health Record	Joe Kalaidis	Yes	This is a sample DHS Profile	1.20 MB Delete

Done

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The new FILE appears in the list below, with Source indicated.

To DELETE a FILE, click DELETE. There is no “undo” function so be careful when deleting files.

DEPARTMENT OF HUMAN SERVICES

RelayHealth - Add File to Health Record - Internet Explorer

https://app.relayhealth.com/Patients/PHR/File/ProviderAddFileAttachment_V2.aspx?ptid=11

Home Messages Results Patients

Name: Beneficiary Ottetail-R (dependent) Home: 952-486-1201 DHS PMI: Online Work: Health Plan: Gender: Male Mobile: Health Plan Id: Date of Birth: Jan 1, 1950

Add File to Health Record

File attachments are stored on the Patient Record and available to the patient unless visibility is set to no, below.

Visible to Patient Yes No

FileName * Browse...
5MB max. All files are scanned for viruses (view [disclaimer](#)).

Comments

Upload

Files

Filename	Associated Information	Source	Visible to Patient	Comments	Size
EWServiceAgreementLettersRecipient.pdf	Health Record	Legalrepor Ottetail-R	Yes		271.25 KB
SAMPLE PnR Profile Page 3-22-17.pdf	Health Record	Joe Kalaidis	Yes	This is a sample DHS Profile	1.20 MB
Advanced Directive sample form.pdf	Health Record	Joe Kalaidis	Yes		233.33 KB

Done

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Other Functionality from the Case Manager/provider staff view of the Beneficiary record: click on ACTIONS to see this list, then click on the desired Action. We will not use NEW REFERRAL, ADD PROVIDER LINK, FIND DUPLICATES, or SHARE THIS PATIENT HEALTH RECORD.

- New Colleague Message – same functionality as previously documented
- New Patient (Beneficiary) Message – same functionality as previously documented
- View/Print Health Record

The screenshot shows the RelayHealth Clinical Summary interface for a patient. The patient's name is Beneficiary Ottetail-R (dependent), born Jan 1, 1950. The interface includes sections for Messages, Active Medications (Aspirin Adult Low Strength), Allergies (Medication), and Consents. The 'Actions' dropdown menu is open, listing various actions available for the patient record. A blue arrow points from the text above to the 'View/Print Health Record' option in the dropdown.

Subject	Date
Note to Office	Apr 6, 2017
RE: Sample message in PHR	Apr 6, 2017
Note to Office	Mar 15, 2017
RE: Sample message in PHR	Mar 15, 2017

Drug	Medication and Insurance Coverage Details	Action
Aspirin Adult Low Strength (Aspirin)	Oral Tablet Chewable 81 MG	Edit

Consents

- Receive Surescripts Medication history
- Share Patient Record outside of Practice
- Share Immunization data with State Registry

November 2017

The HOME page and other settings can be customized by clicking on EDIT/VIEW to get the next screen.

DEPARTMENT OF HUMAN SERVICES

Joe Kalaidis

Home Messages Results Patients

At a Glance All Inboxes Scheduled

Inbox	Results	Unopened/Total	Overdue
Kalaidis, Joe	-	41/60	0
Practice Inbox -- MN Department of Human Services - Otter Tail	-	0/19	0
MN Department of Human Services - Otter Tail	-	1/6	2

Reminders

- [Patient Approvals](#) 3
- [Resolve Patient Records - Duplicates/Provisionals](#)

webVisit® Interviews
New Referral Message
Manage Practices

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Use this screen for:

1. Editing display of AT-A-GLANCE Inboxes and REMINDERS.
2. Updating CONTACT INFORMATION, USER ID, PASSWORD, and SECURITY QUESTIONS.
3. Click **SAVE** when the update is complete.

November 2017

NOTE: For use of the DHS Personal Health Record from a smartphone or other mobile device - There is not an app for this – the system works in Safari (iPhone) or any other browser on the smartphone or mobile device. Navigation is different due to the smaller screen size on the smartphone or mobile device compared to a computer screen. Log in to app.relayhealth.com

In the illustration below, the three lines in the upper right are known as the “Hamburger” menu. Click on it to get to the functions documented above, all of which work with a smartphone. When an item of Health Records is selected, you will be prompted to rotate the phone sideways for landscape view. Use the Hamburger menu to navigate to other pages/sections of the PHR website.

