



**Legal or Authorized Representative Training for Registration and Ongoing Usage of
RelayHealth Personal Health Record (PHR) through
Minnesota Department of Human Services**

Overview:

Thank you for participating in the demonstration of the RelayHealth Personal Health Record (PHR)! We appreciate your willingness to help us apply technology for the benefit of recipients of Long Term Services & Supports (LTSS) from the Minnesota Department of Human Services (DHS).

This document describes the process that legal or authorized representatives acting on behalf of beneficiaries of services will use for initial one-time registration and for ongoing use of the RelayHealth Personal Health record (PHR) from Minnesota DHS. The process for Beneficiaries acting on their own behalf is covered in a separate document.

The section footers in this document identify:

- Legal or Authorized Representative Registration (one-time process)
- Legal or Authorized Representative Ongoing PHR Usage

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.

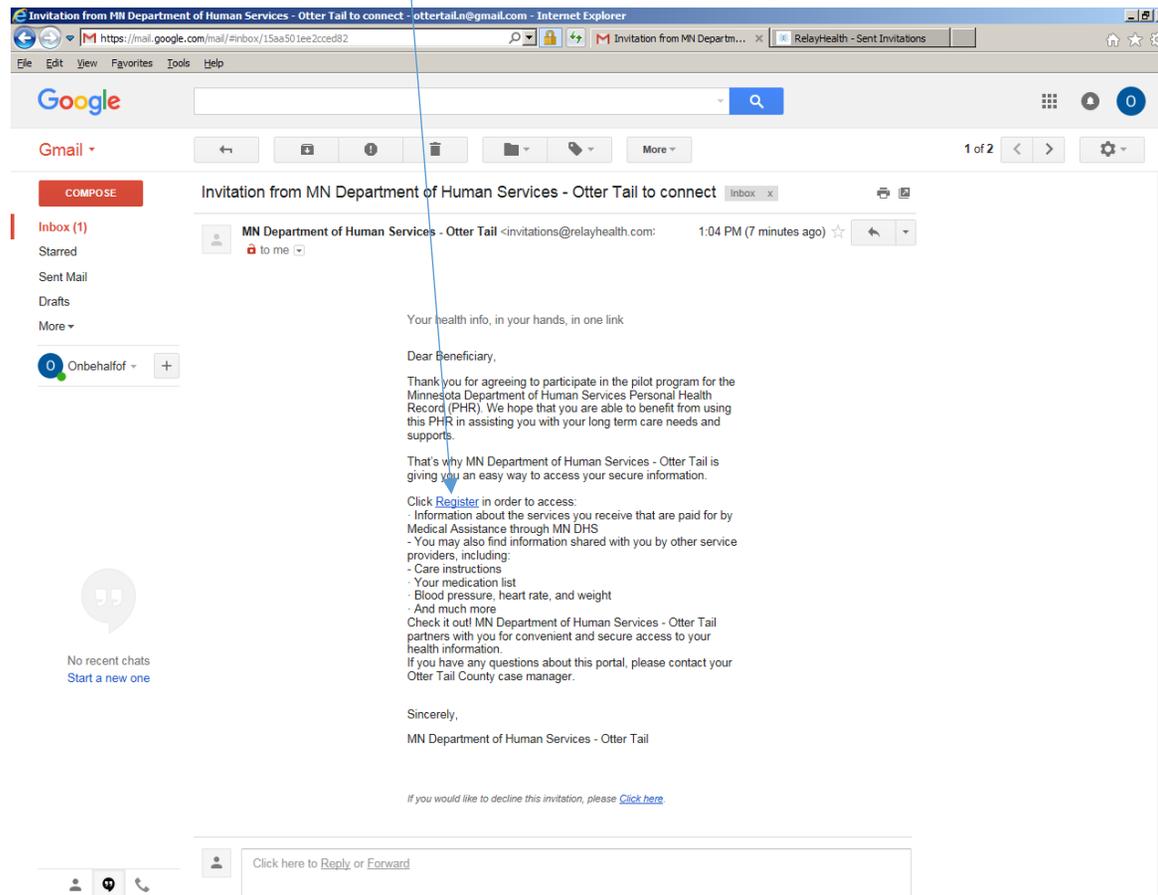
Note (2) – September 2017: after this training document was produced in May 2017, the organization names in the PHR were changed:

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

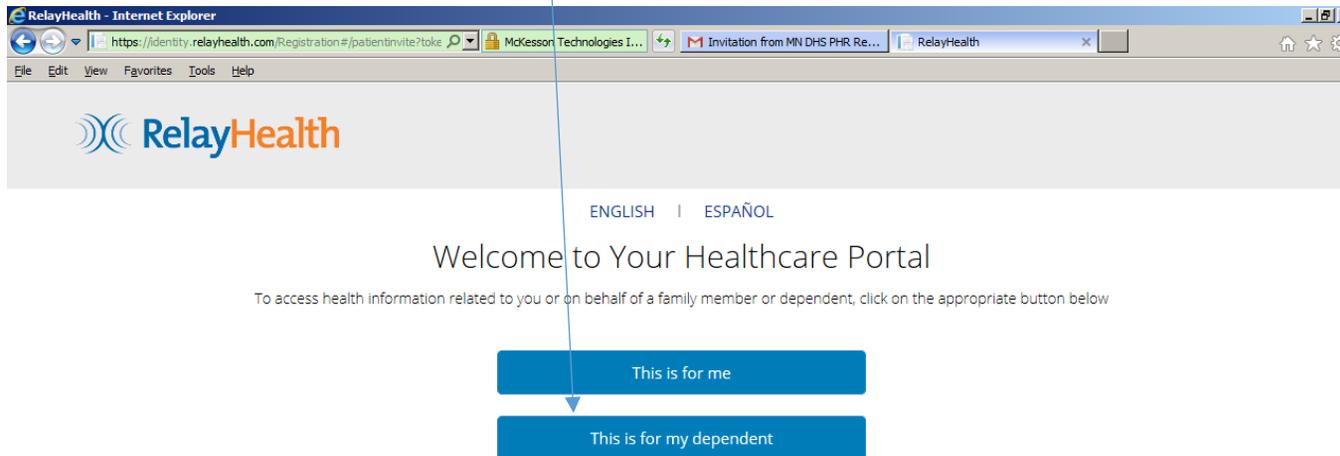
There is no change to the usage and views illustrated in the following pages; only the organization names are now different than what is shown in this document.

This Section identifies the process for registering a legal or authorized representative who will use the RelayHealth PHR on behalf of a Beneficiary of LTSS services.

The Legal or Authorized Representative will receive an email message that contains a hyperlink to begin the registration process. This is an example of how the message appears in Gmail. It may appear slightly different in other email systems. The Legal or Authorized Representative clicks on the REGISTER link to begin registration. The email message is addressed to the Beneficiary, although the Legal or Authorized Representative is acting on behalf of the Beneficiary, and the message goes to the Legal or Authorized Representative's email address.

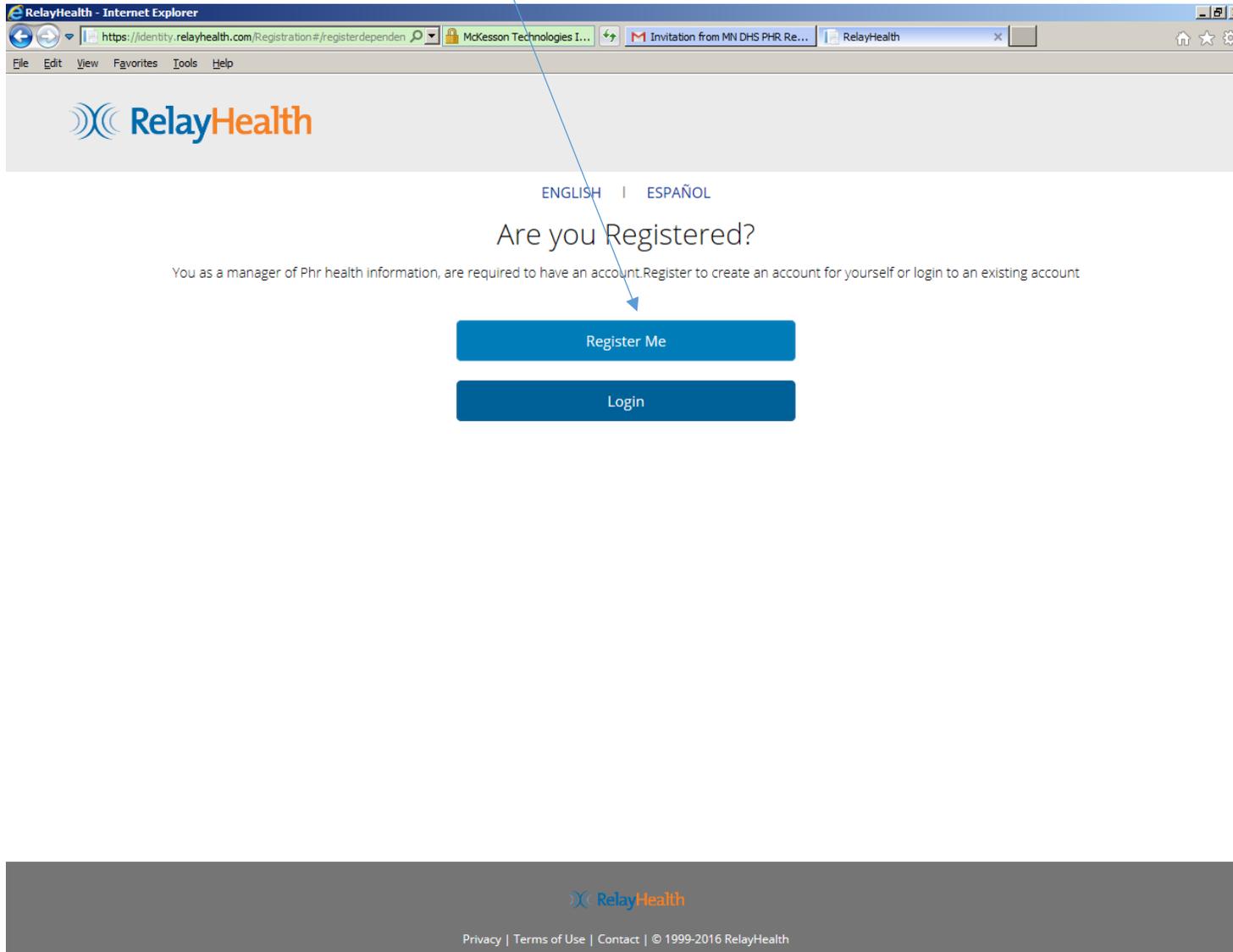


The Legal or Authorized Representative clicks on THIS IS FOR MY DEPENDENT (Beneficiary). Please note that “DEPENDENT” is the term used in the RelayHealth PHR to identify a Beneficiary when a Legal or Authorized representative is using the PHR on behalf of the Beneficiary. It does not automatically mean that the Beneficiary is a dependent in the legal or financial sense of the term “dependent”.



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The Legal or Authorized Representative clicks REGISTER ME if he/she does not have an account in the RelayHealth Personal Health Record, or clicks LOGIN if he/she already has an account. In this step the Legal or Authorized Representative creates an account for him/herself only.



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The Legal or Authorized Representative proceeds with registration for him/herself, fills out this screen, checks “I have read and agree to the Terms of Use”, and clicks Next.

RelayHealth - Internet Explorer

https://identity.relayhealth.com/Registration#/demographics?tok

McKesson Technologies I... Invitation from MN Department ... RelayHealth

File Edit View Favorites Tools Help

ENGLISH | ESPAÑOL

Enter Your Information Below

Your information will be used to manage your dependents account.

First Name * Onbehalf **Last Name *** Ottertail-K

Administrative Sex *
 Male Female

Country of Residence *
United States

Street Address *
9999 Lincoln Avenue

Town or City * Fergus Falls **State/Province *** Minnesota **Zip Code *** 56537

I have read and agree to the [Terms of Use](#) and I consent to collection, use, and disclosure of my personal information as described in the [Privacy Policy](#).

Next



The Legal or Authorized Representative enters his/her Date of Birth (not the beneficiary's) and phone #.

RelayHealth - Internet Explorer

https://identity.relayhealth.com/Registration#/dob?token=21288

McKesson Technologies I... Invitation from MN Department ... RelayHealth

File Edit View Favorites Tools Help



ENGLISH | ESPAÑOL

Enter Your Information Below

Your information will be used to manage your dependents account.

Email *

Date of Birth *

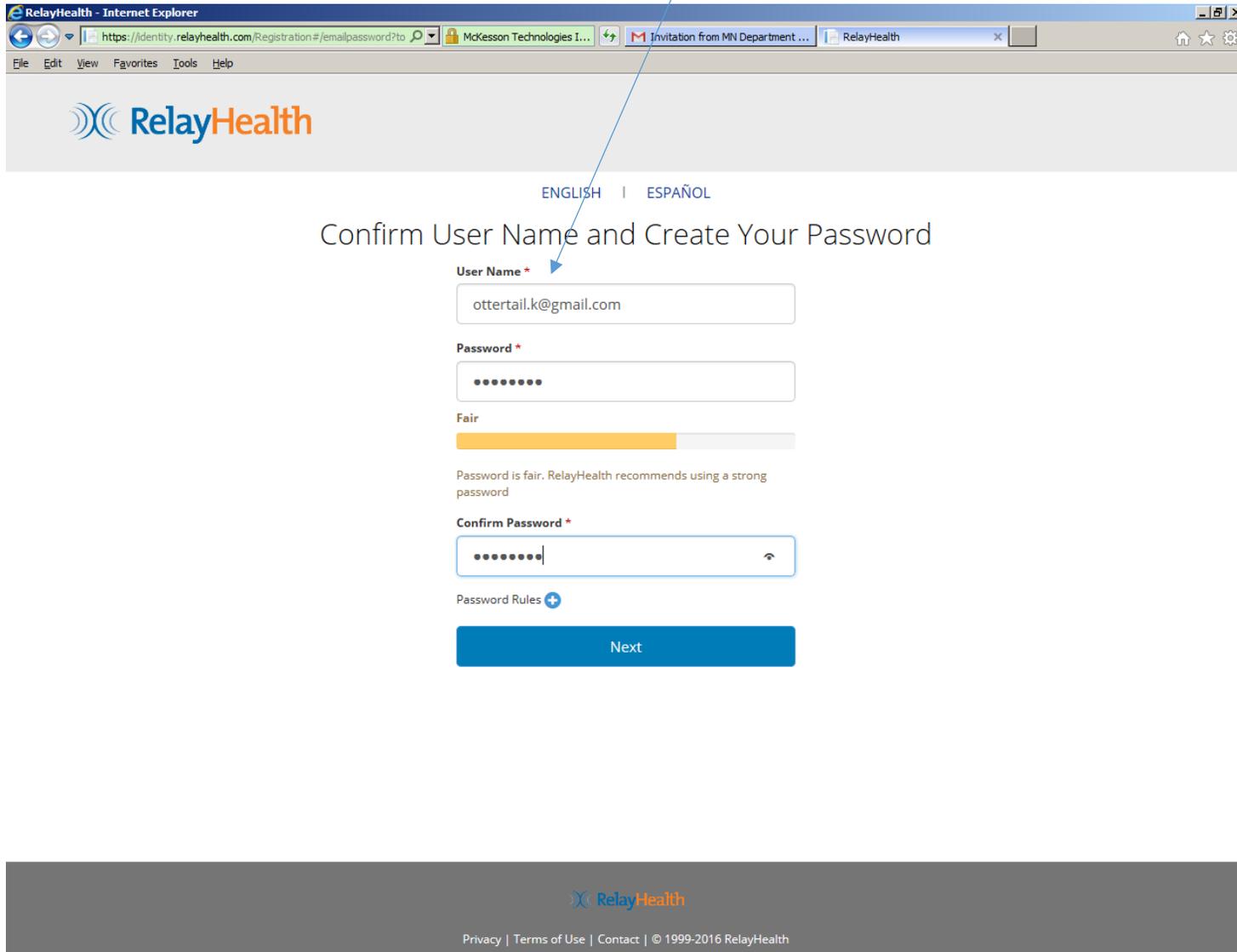
Primary Contact Number

 x

Next

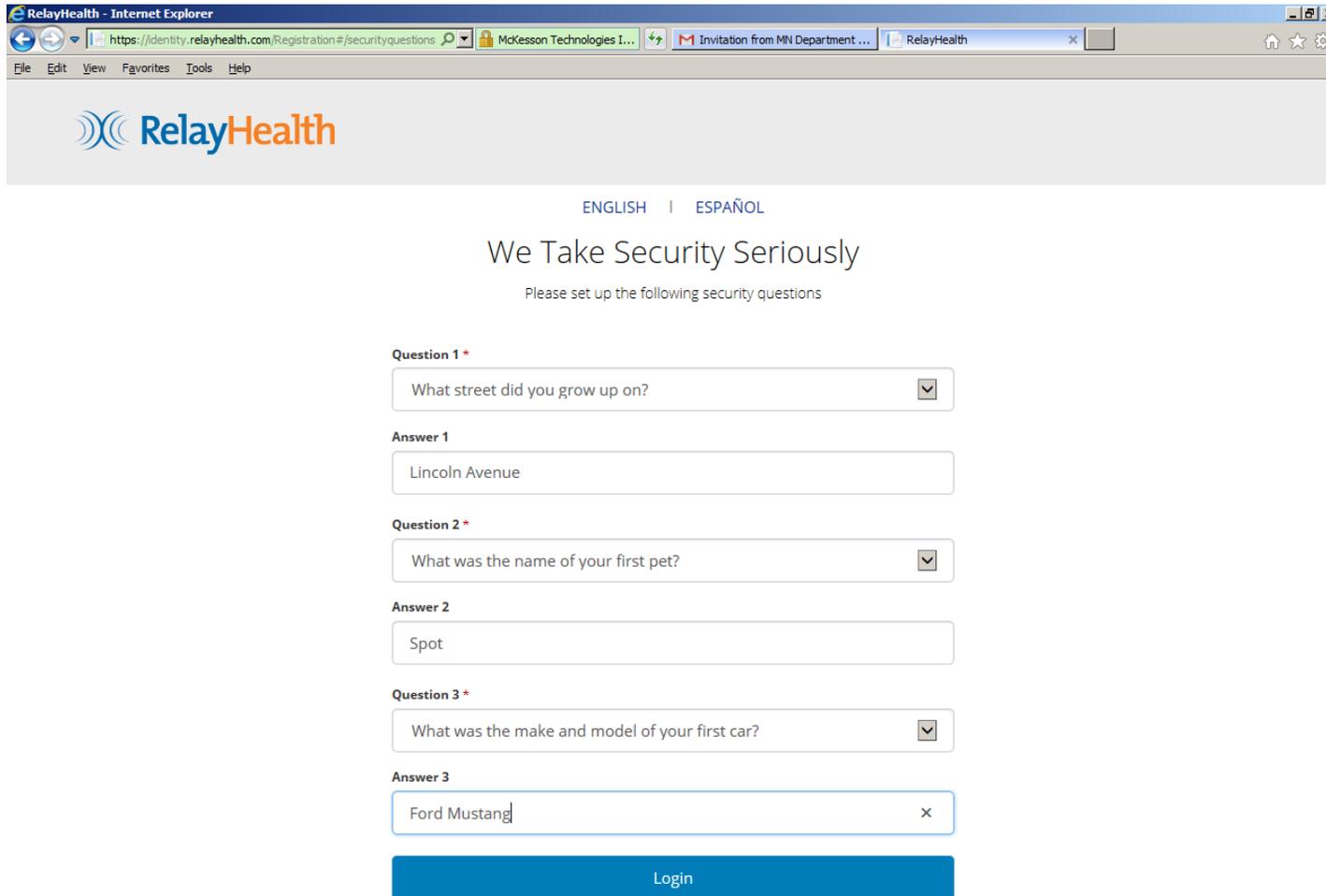


The Legal or Authorized Representative confirms his/her user name and password. The user name defaults to email address but can be changed if desired. However, we recommend using email address as user name in order to avoid confusion.



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The Legal or Authorized Representative selects security questions and enters answers. This information is used for identity verification if needed.



The screenshot shows a web browser window with the RelayHealth logo and navigation options. The main heading is "We Take Security Seriously" with a sub-heading "Please set up the following security questions". There are three questions, each with a dropdown menu and a text input field for the answer.

Question 1 *
What street did you grow up on? [dropdown]

Answer 1
Lincoln Avenue

Question 2 *
What was the name of your first pet? [dropdown]

Answer 2
Spot

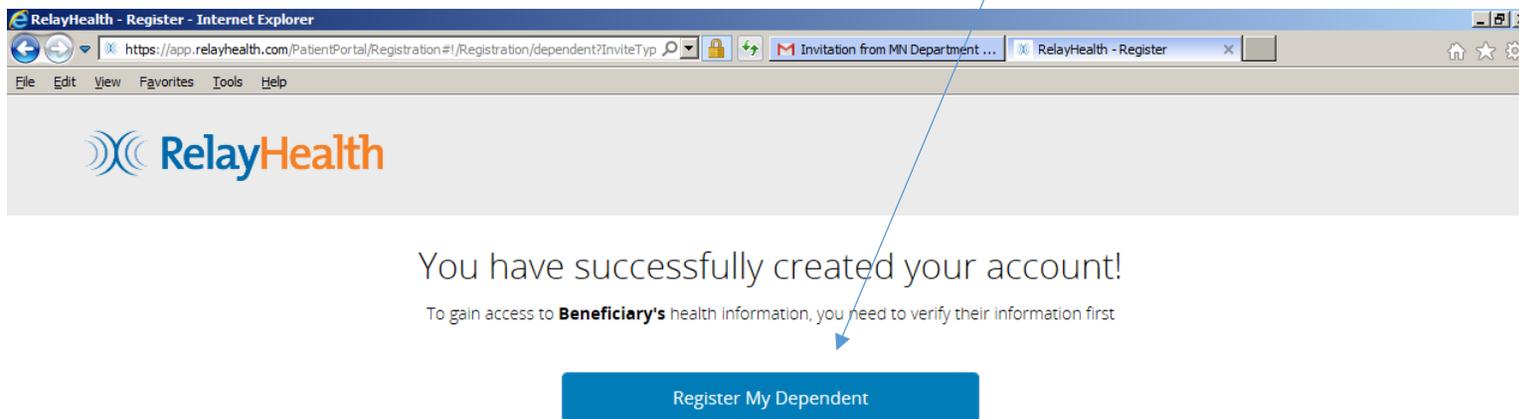
Question 3 *
What was the make and model of your first car? [dropdown]

Answer 3
Ford Mustang [input field]

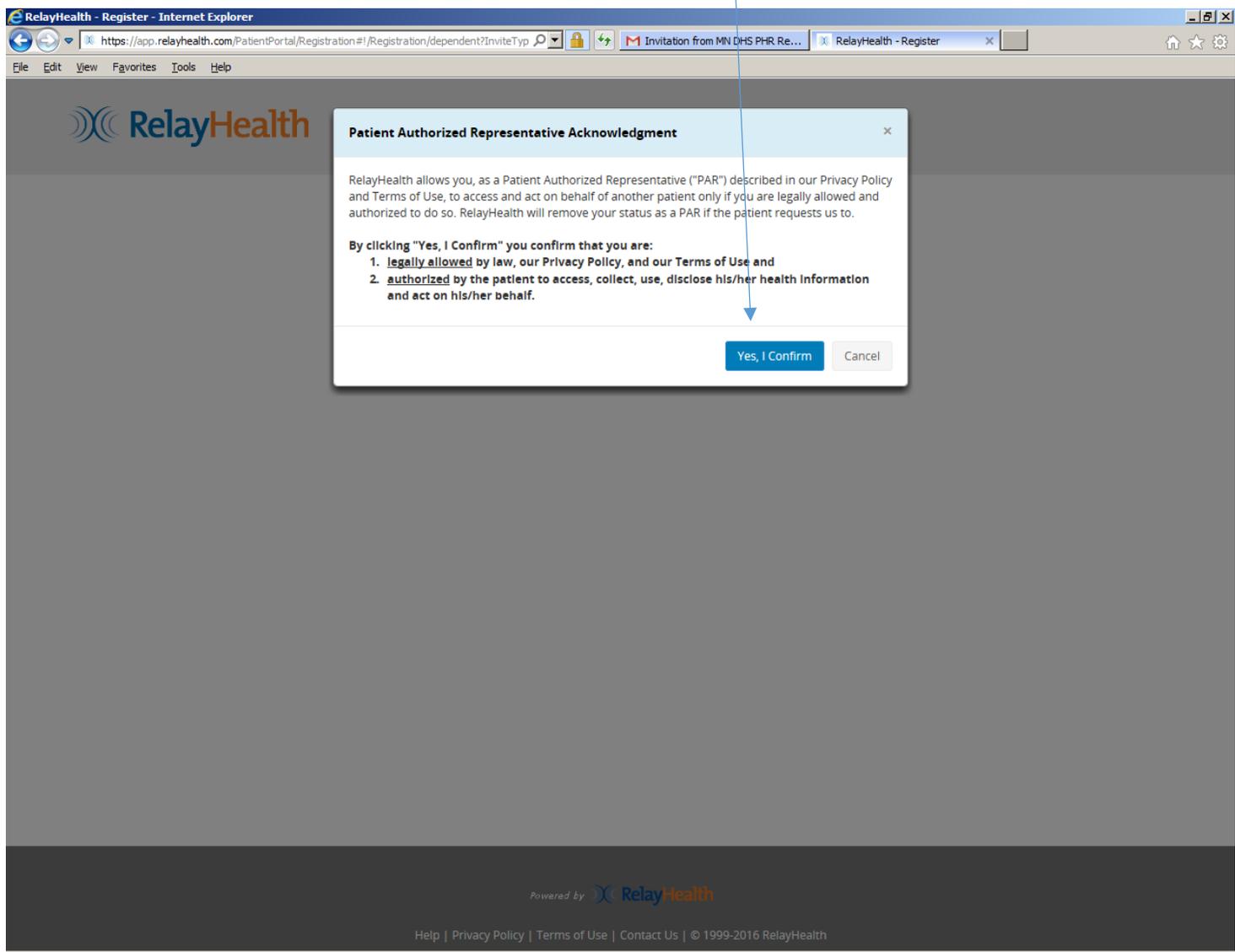
Login

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Next step is to register the beneficiary (DEPENDENT in RelayHealth). Click REGISTER MY DEPENDENT.

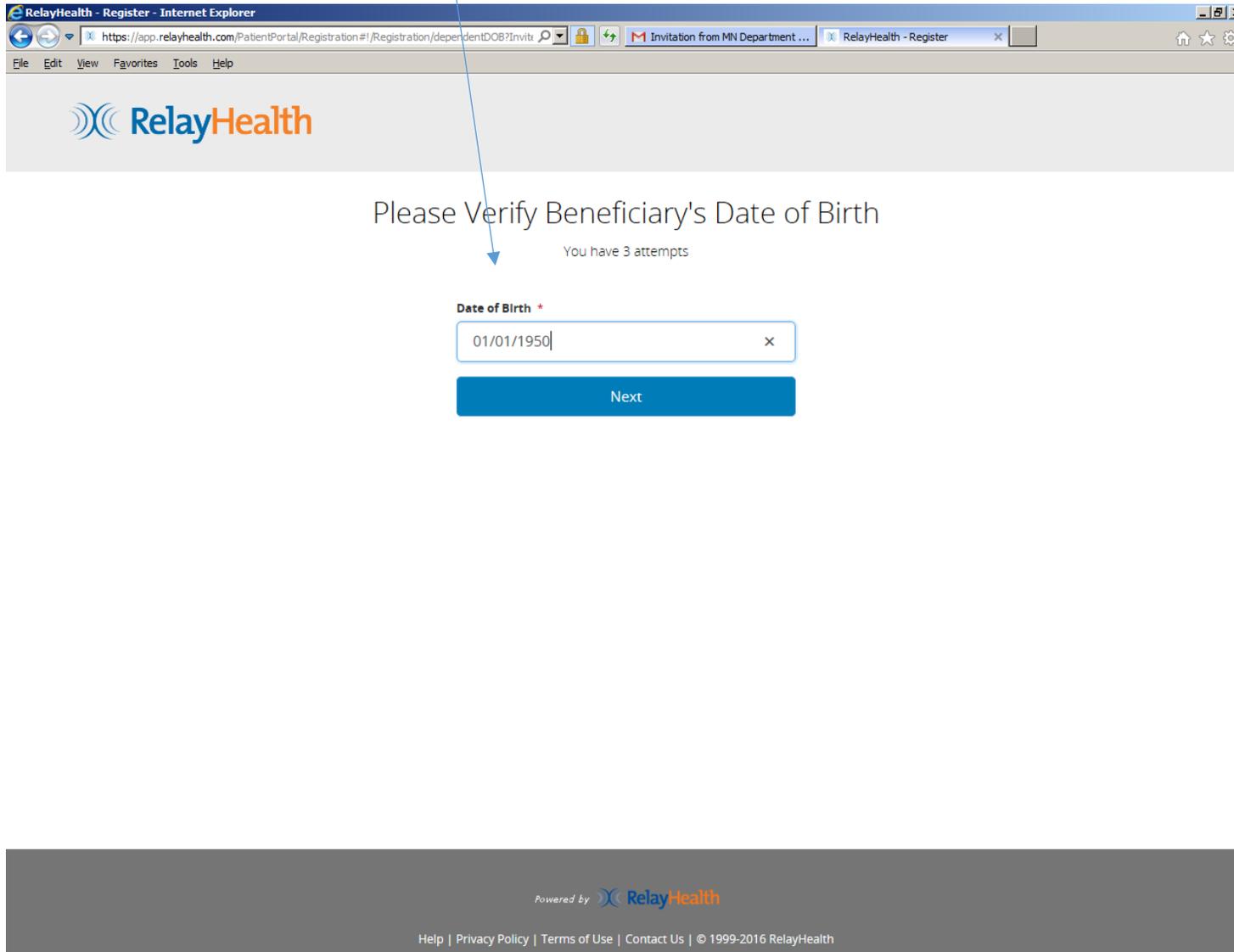


The Legal or Authorized Representative confirms that he/she is authorized by clicking YES, I CONFIRM.



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The Legal or Authorized Representative enters the Beneficiary's Date of Birth. In the example below, "Beneficiary" is the first name of the sample Beneficiary.



The Legal or Authorized Representative clicks "I have read and agree...", and clicks NEXT.

RelayHealth - Register - Internet Explorer

https://app.relayhealth.com/PatientPortal/Registration#/Registration/demographics?Invite1

Invitation from MN Department ...

RelayHealth - Register

File Edit View Favorites Tools Help

RelayHealth

Welcome, Beneficiary!

This information was populated by the healthcare provider or facility that invited **Beneficiary**. You will be able to edit it after you are registered under the 'Health Records' section of the portal.

First Name * Beneficiary

Last Name * Ottertail-K

Gender *
 Male Female

Country *
United States

Street Address *
9999 Lincoln Avenue

Town or City * Fergus Falls

State/Province * Minnesota

Zip Code * 56537

I have read and agree to the [Terms of Use](#) and I consent to collection, use, and disclosure of my personal information as described in the [Privacy Policy](#)

Next

Powered by **RelayHealth**

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The Legal or Authorized Representative updates the email address and/or contact phone number if desired, then clicks COMPLETE REGISTRATION.

RelayHealth - Register - Internet Explorer

https://app.relayhealth.com/PatientPortal/Registration#1/Registration/phone?InviteType=Pr

File Edit View Favorites Tools Help

RelayHealth

Welcome, Beneficiary!

This information was populated by the healthcare provider or facility that invited **Beneficiary**. You can use a different email address and mobile number than what we have below.

Email Address *

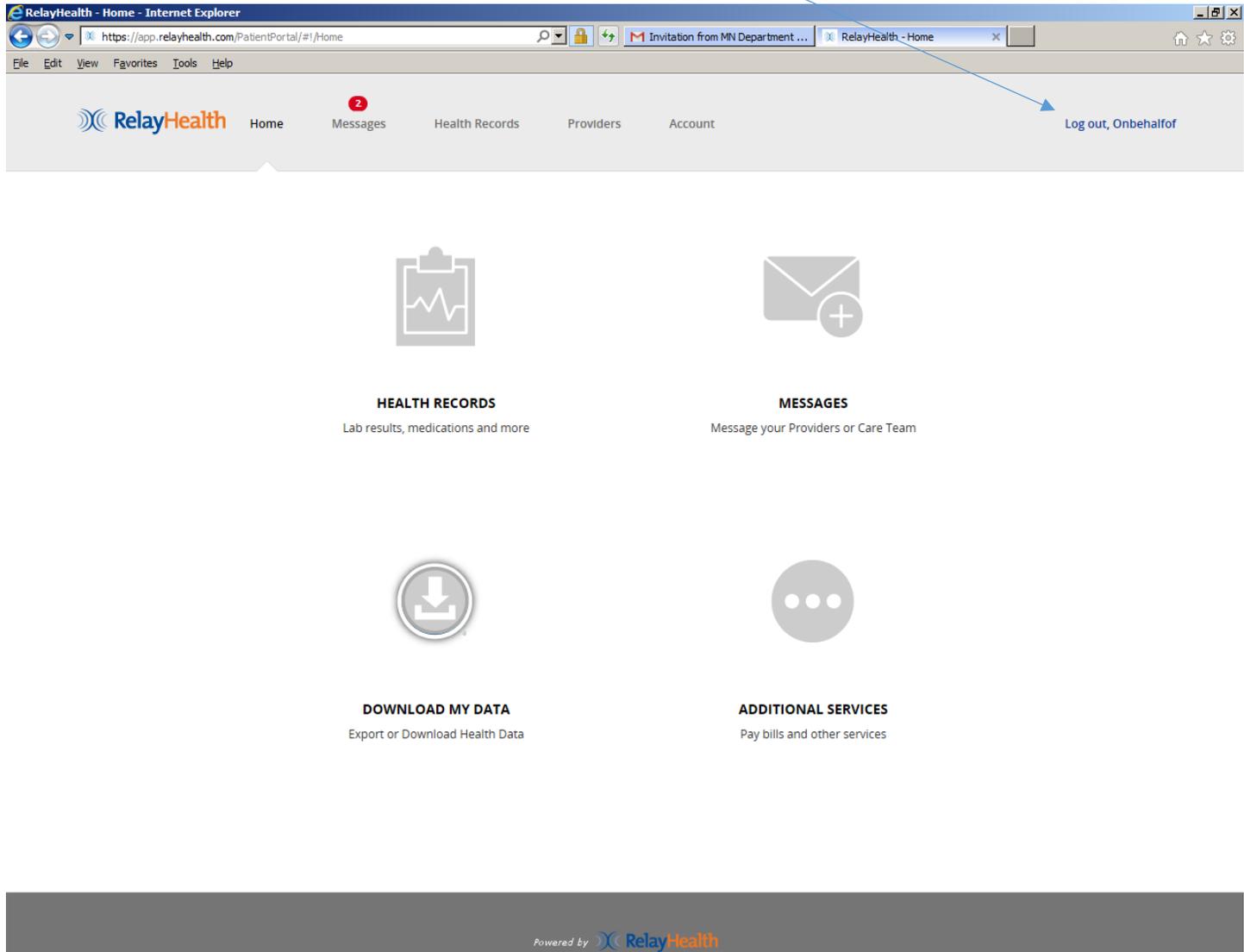
Beneficiary's Date of Birth *

Inviting Provider or Facility Name *

Your Primary Contact Number

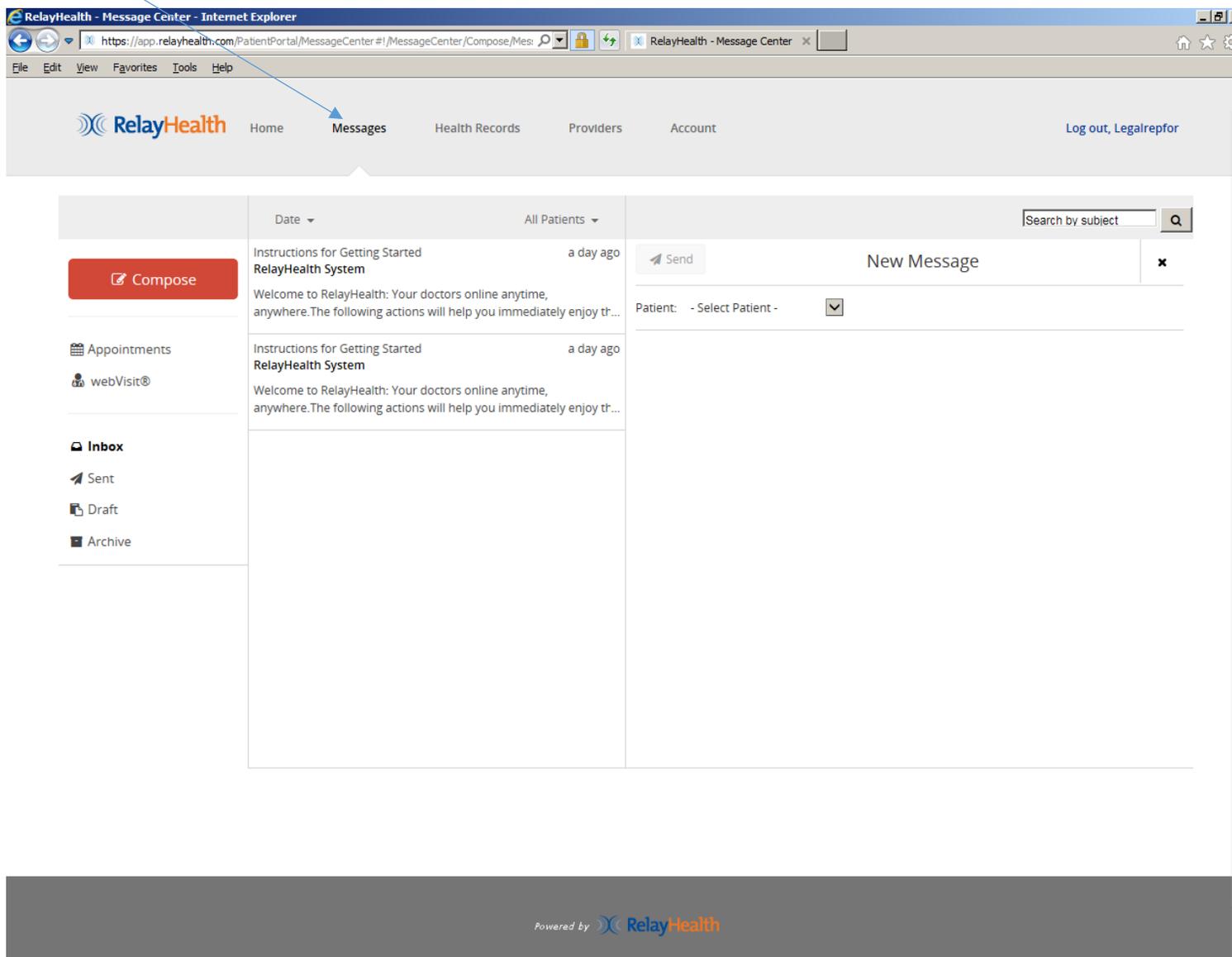
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The RelayHealth Home page for the Legal or Authorized Representative is displayed when registration is complete, with the Legal or Authorized Representative's first name displayed. In this example, the Legal or Authorized Representative's first name is "Onbehalfof".

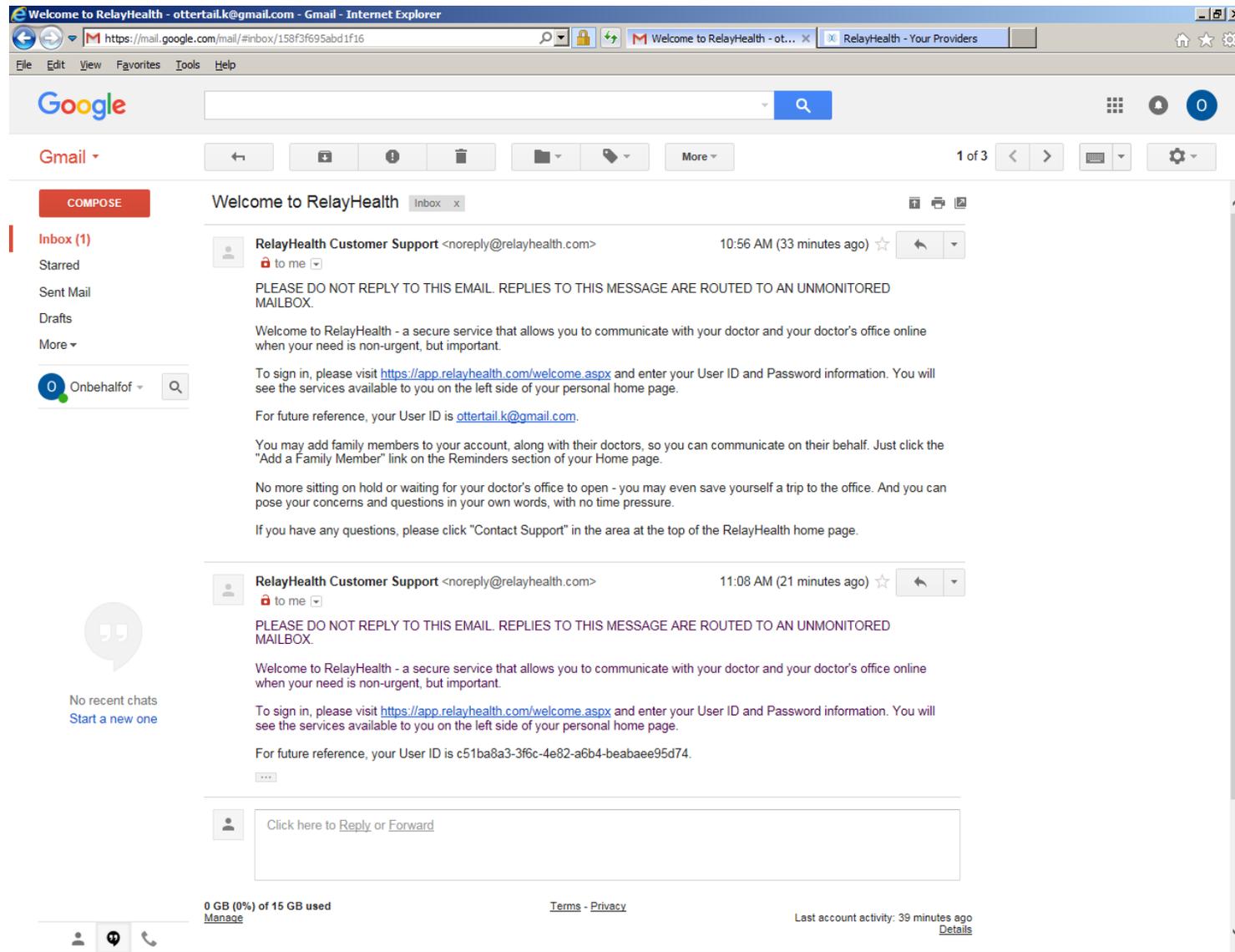


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Click on MESSAGES to see the “welcome” message inside the PHR when registration is complete.

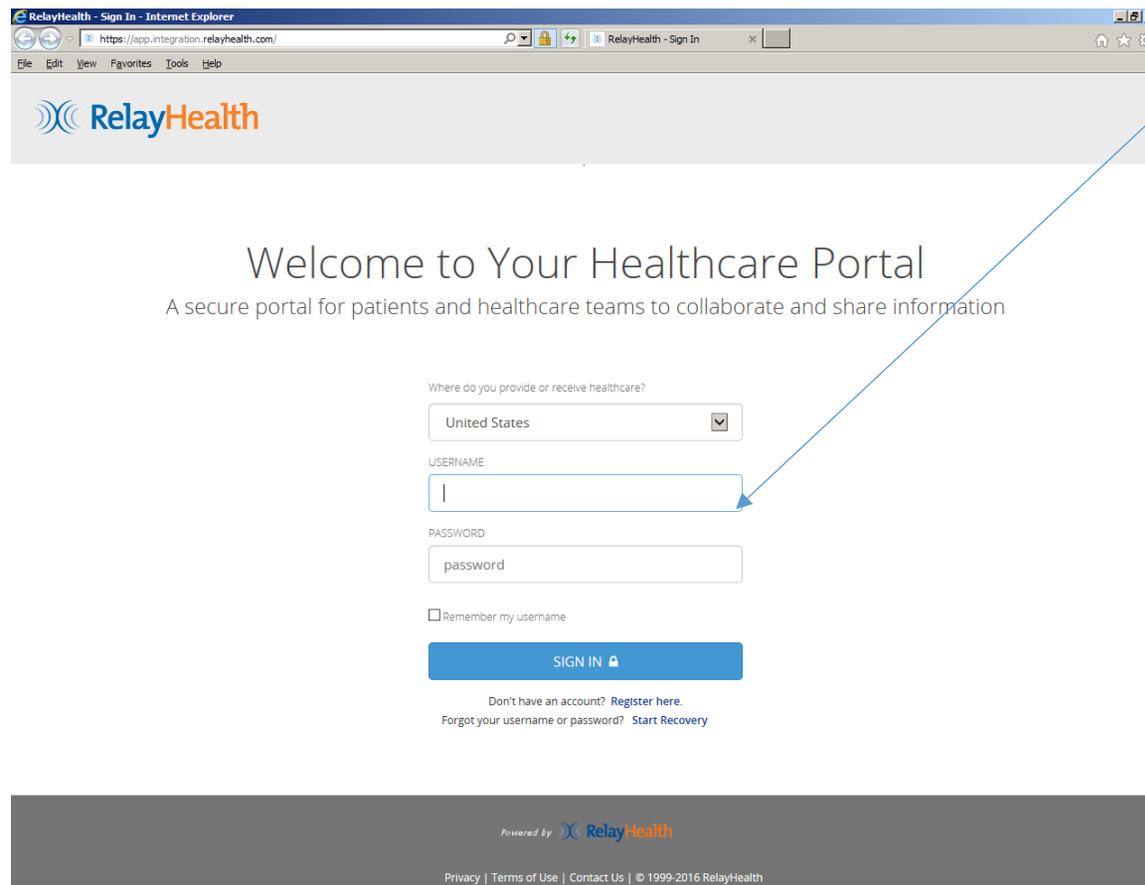


This is a sample of the email "welcome" message that the Legal or Authorized Representative receives when registration is complete.



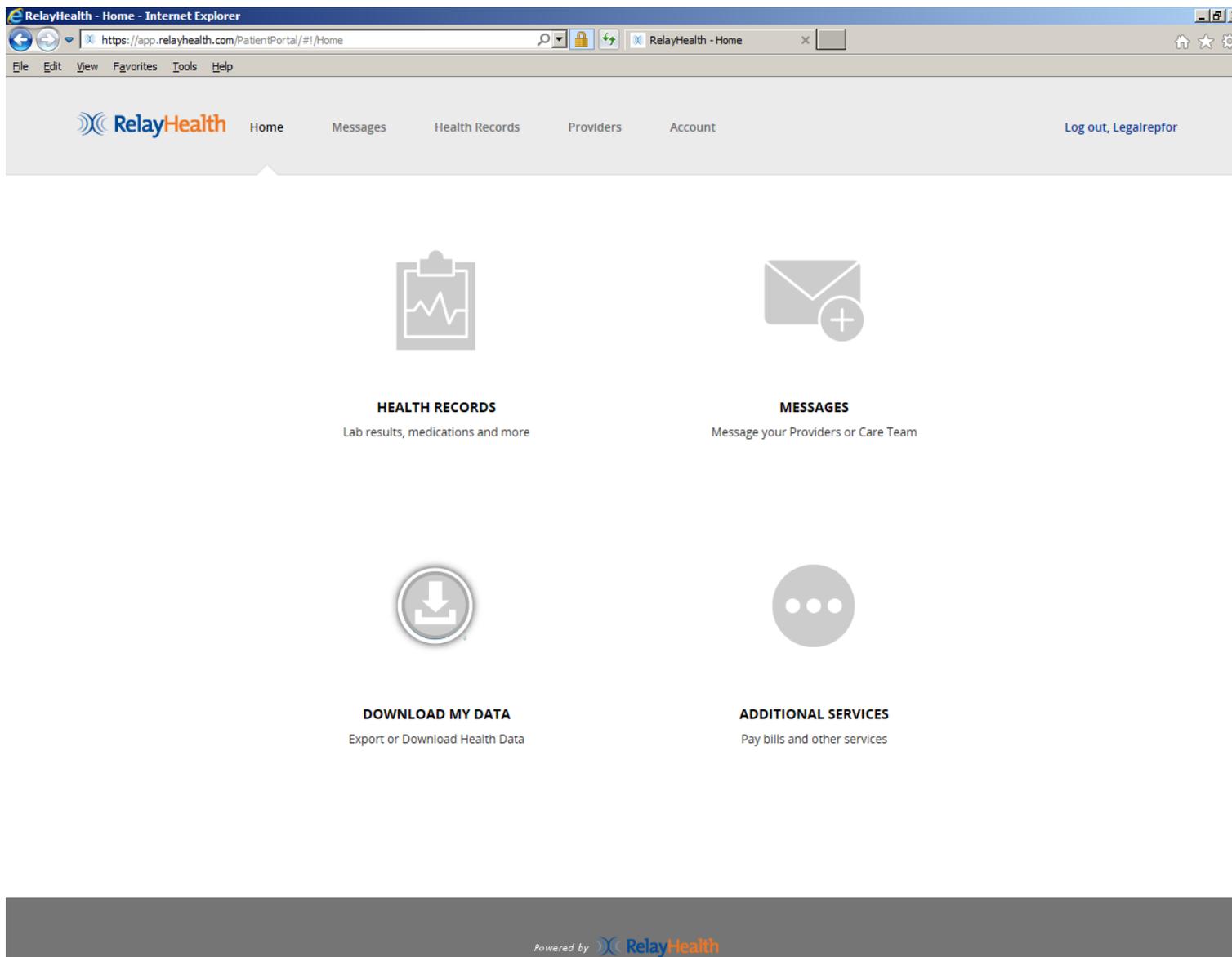
This section explains how a Legal or Authorized Representative can use the RelayHealth PHR on behalf of a beneficiary when registration is complete.

The functions shown in the pages below are for a legal or authorized representative using the PHR on behalf of a beneficiary of services. A legal or other authorized representative working on behalf of a beneficiary will have his/her (representative) account with the Beneficiary showing as a DEPENDENT. The Legal or Authorized Representative logs in with Username and Password that he/she set up in the registration process.



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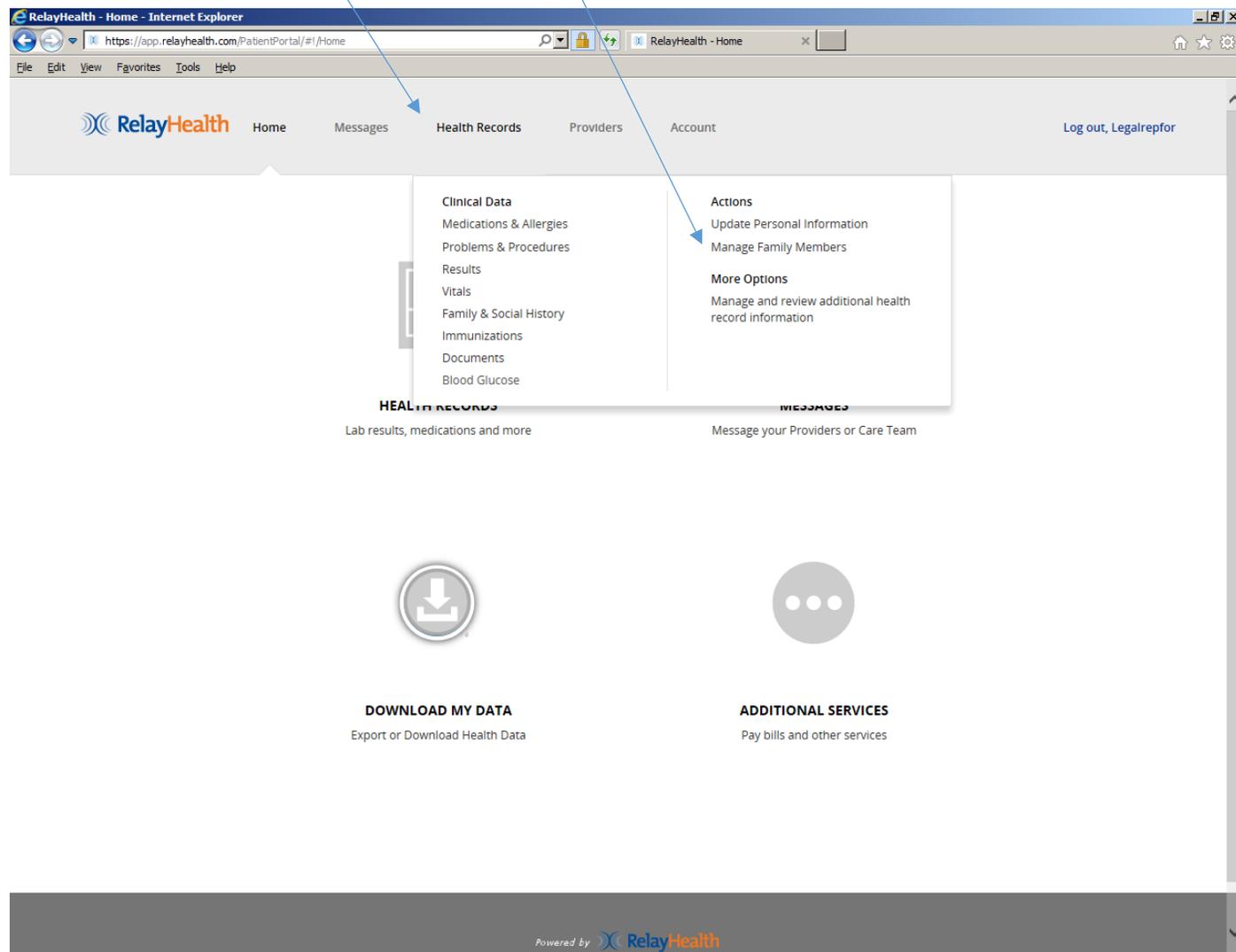
This is the main screen for the RelayHealth Personal Health Record (PHR).



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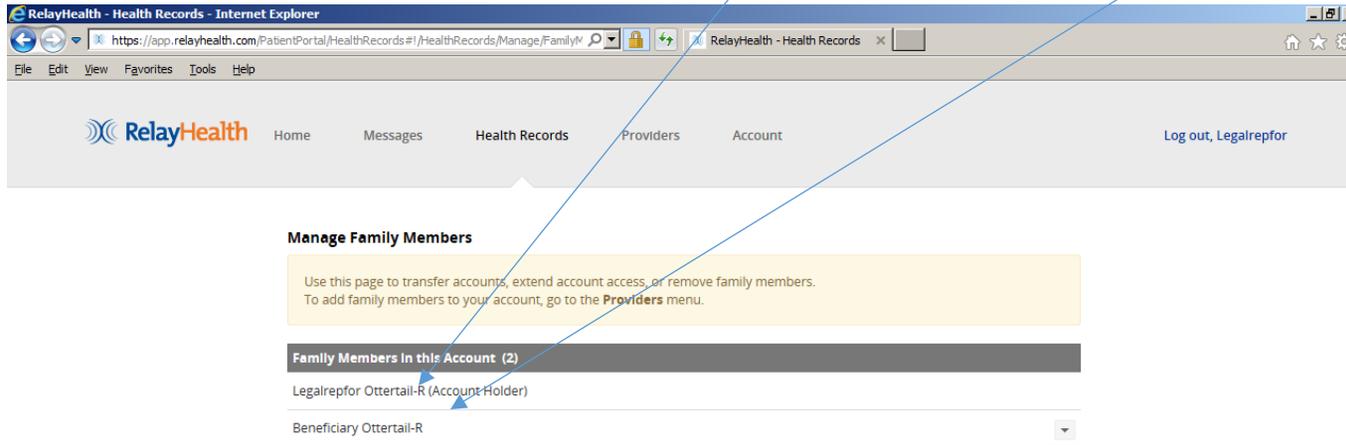
As noted previously, a legal or other designated representative working on behalf of a beneficiary will have his/her (representative) account with the Beneficiary showing as a DEPENDENT.

To illustrate this, click on HEALTH RECORDS, then MANAGE FAMILY MEMBERS to get the next screen.



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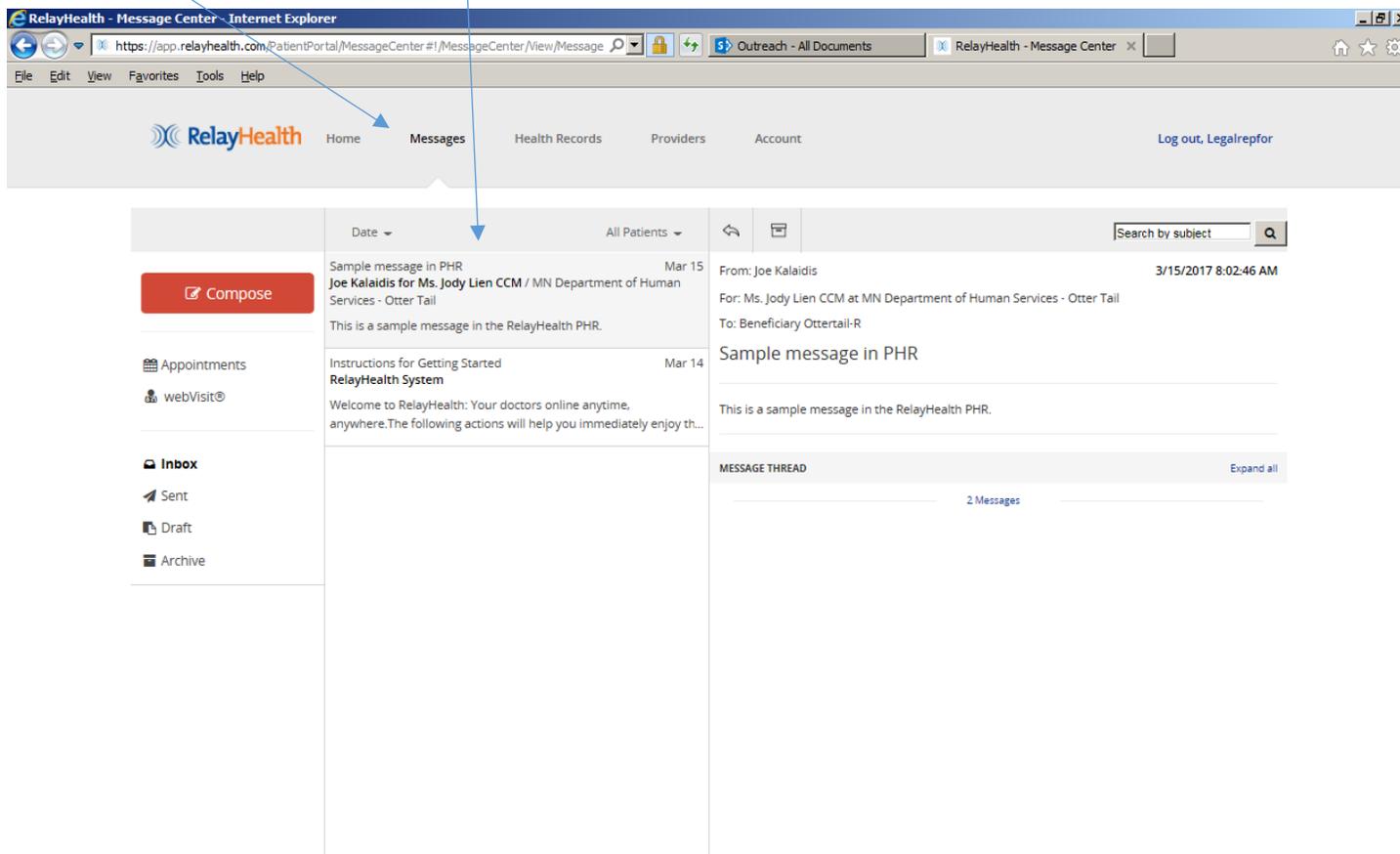
This shows the Legal or authorized representative as the ACCOUNT HOLDER with the Beneficiary as a DEPENDENT. Please note that “DEPENDENT” is the term used in the RelayHealth PHR to identify a Beneficiary of services; it does not automatically mean that the Beneficiary is a dependent in the legal or financial sense of the term.



MESSAGES: These are similar in concept to email, however they exist completely within the PHR.

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Click on MESSAGES, then click on a message to display it in the viewing pane.

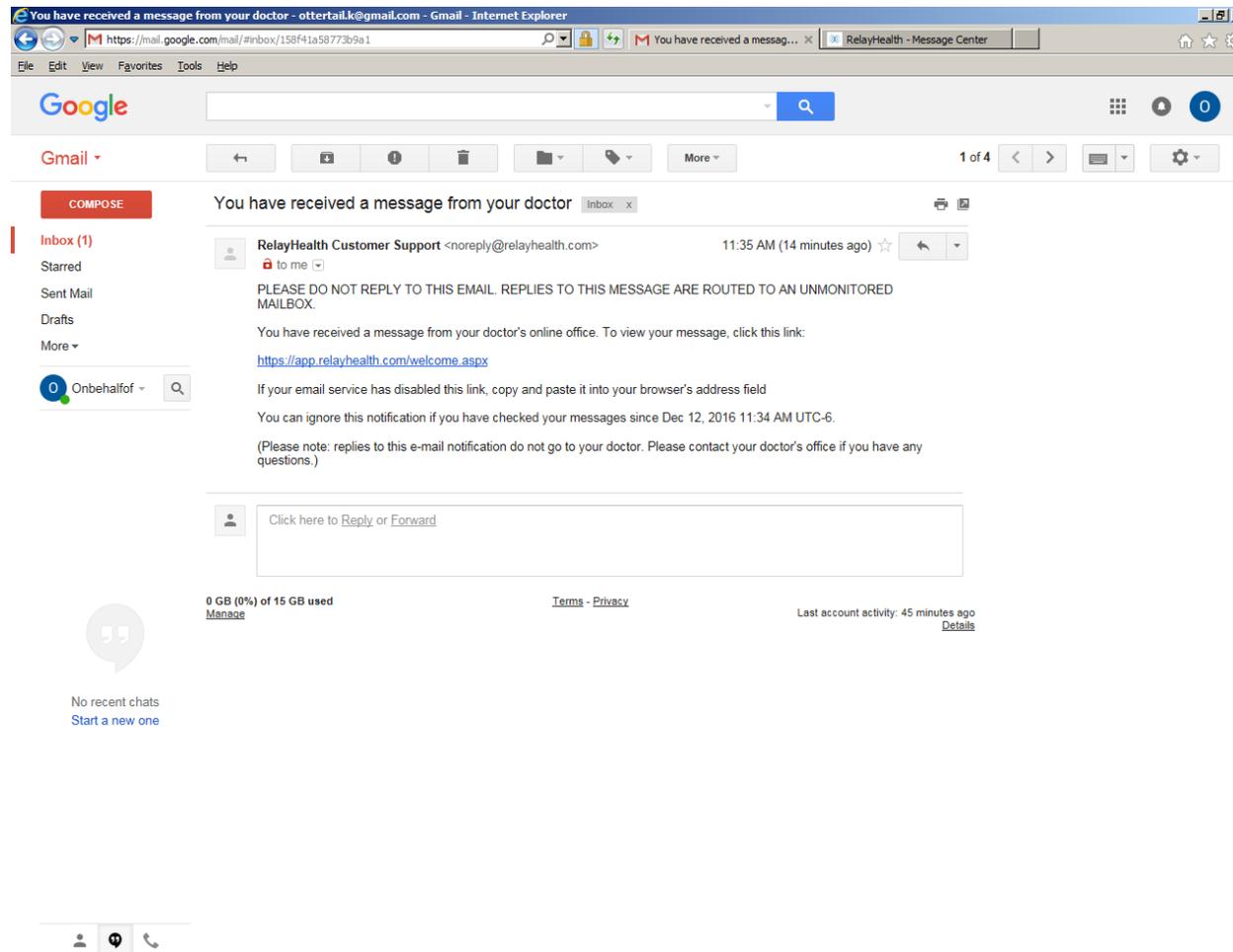


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Q: How to know that there is a message from the Case Manager if not logged into the PHR?

A: The message from the Case Manager within the PHR also triggered the message below to the legal or authorized representative's regular email address. The sample below shows how the message appears in Gmail, and it may appear slightly differently in other email systems.

Note that there is no individual Protected Health Information or Personal Identifying Information in this message, so that the Beneficiary's or Legal or Authorized Representative's privacy is protected.



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Click on the REPLY icon to reply to a message.

RelayHealth - Message Center - Internet Explorer

https://app.relayhealth.com/PatientPortal/MessageCenter#/MessageCenter/View/Message

Outreach - All Documents | RelayHealth - Message Center

File Edit View Favorites Tools Help

RelayHealth Home Messages Health Records Providers Account Log out, Legalrepfor

Date ▾ All Patients ▾

Compose

Appointments
webVisit®

Inbox
Sent
Draft
Archive

Sample message in PHR Mar 15
Joe Kalaidis for Ms. Jody Lien CCM / MN Department of Human Services - Otter Tail
This is a sample message in the RelayHealth PHR.

Instructions for Getting Started Mar 14
RelayHealth System
Welcome to RelayHealth: Your doctors online anytime, anywhere.The following actions will help you immediately enjoy th...

From: Joe Kalaidis 3/15/2017 8:02:46 AM
For: Ms. Jody Lien CCM at MN Department of Human Services - Otter Tail
To: Beneficiary Ottertail-R

Sample message in PHR

This is a sample message in the RelayHealth PHR.

MESSAGE THREAD Expand all

2 Messages

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Help | Privacy | Terms of Use | Contact Us | © 1999-2016 RelayHealth

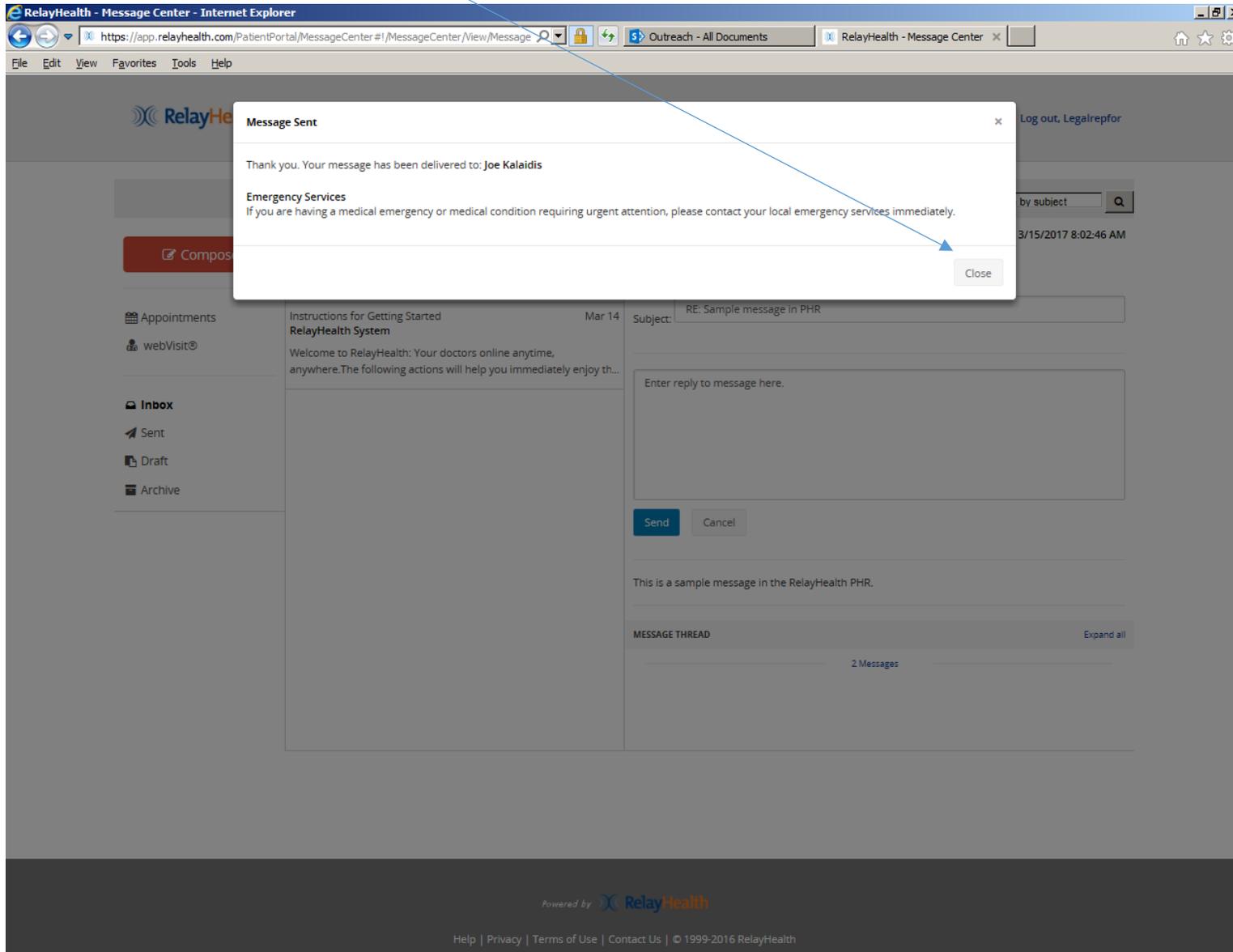
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Enter REPLY message text, then click SEND.

The screenshot shows the RelayHealth Message Center interface in Internet Explorer. The browser address bar displays <https://app.relayhealth.com/PatientPortal/MessageCenter#/MessageCenter/View/Message>. The page header includes the RelayHealth logo and navigation links: Home, Messages, Health Records, Providers, Account, and Log out, Legalrepfor. A left sidebar contains navigation options: Compose, Appointments, webVisit®, Inbox, Sent, Draft, and Archive. The main content area shows a message thread with two messages. The first message, dated Mar 15, is from Joe Kalaidis to Ms. Jody Lien CCM at MN Department of Human Services - Otter Tail. The second message, dated Mar 14, is titled "Instructions for Getting Started RelayHealth System" and includes a welcome message. Below the messages is a reply composition area with a text input field containing the placeholder text "Enter reply to message here." and "Send" and "Cancel" buttons. A "MESSAGE THREAD" section at the bottom indicates "2 Messages" and has an "Expand all" link. A footer at the bottom of the page reads "Powered by RelayHealth" and includes links for Help, Privacy, Terms of Use, and Contact Us, along with the copyright notice "© 1999-2016 RelayHealth".

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Confirmation that message was sent. Click CLOSE to return to messages.



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Click SENT to show the message in SENT items.

RelayHealth - Message Center - Internet Explorer

https://app.relayhealth.com/PatientPortal/MessageCenter#/MessageCenter/View/Message

File Edit View Favorites Tools Help

RelayHealth Home Messages Health Records Providers Account Log out, Legalrepfor

Date All Patients Search by subject

Compose

Appointments

webVisit®

Inbox

Sent

Draft

Archive

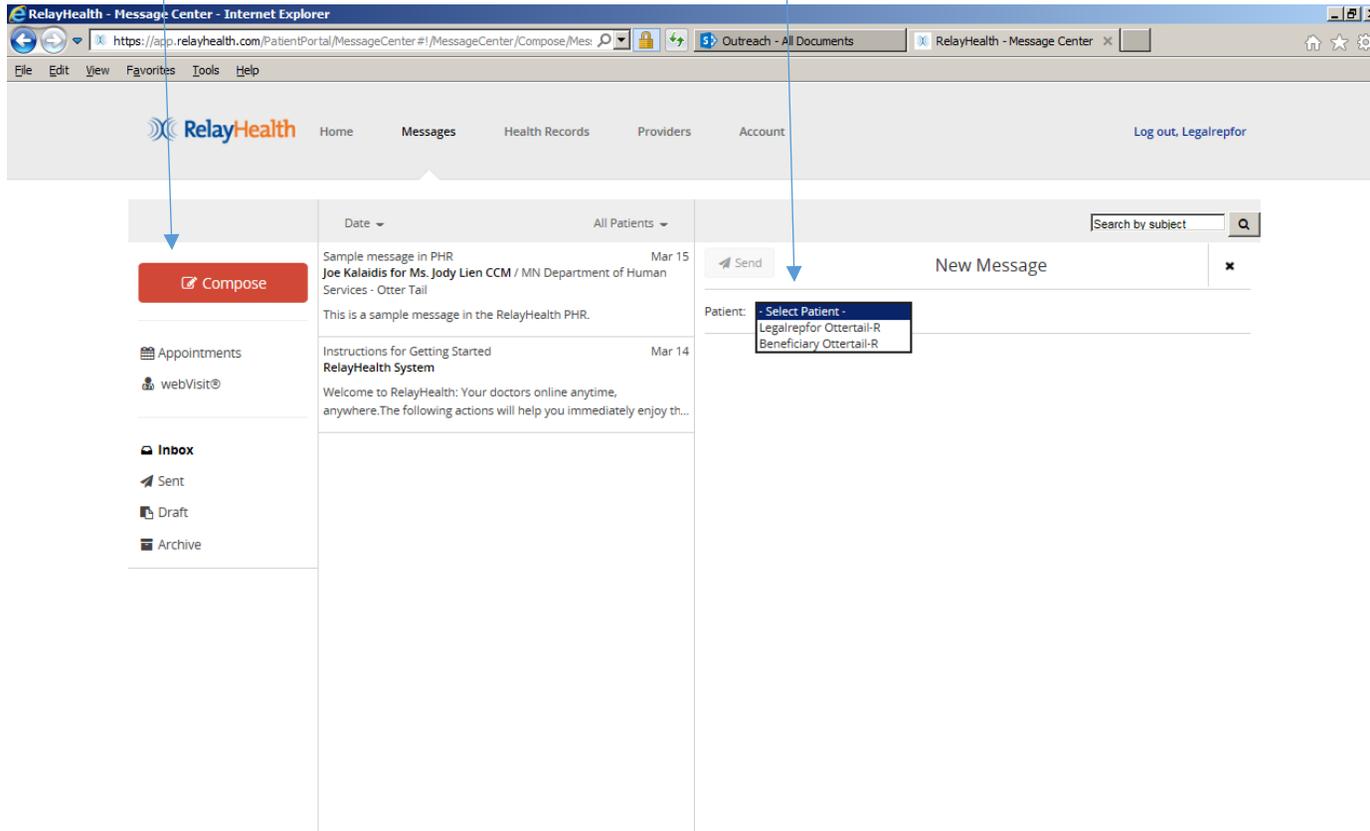
RE: Sample message in PHR a few seconds ago
Ms. Jody Lien CCM / MN Department of Human Services - Otter Tail
This is the reply text for this message.

From: Legalrepfor Ottertail-R 3/15/2017 8:06:51 AM
To: Joe Kalaidis
RE: Sample message in PHR
This is the reply text for this message.

MESSAGE THREAD Expand all
2 Messages

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Click COMPOSE to create a new message. Select the Beneficiary in the “Patient” dropdown. Since the legal or authorized representative is acting on behalf of the beneficiary, send all messages with the beneficiary as “Patient”. Please note that all views of the PHR display the legal or authorized representative view as the default, so you will need to click on the Patient dropdown to see the beneficiary view on all screens.



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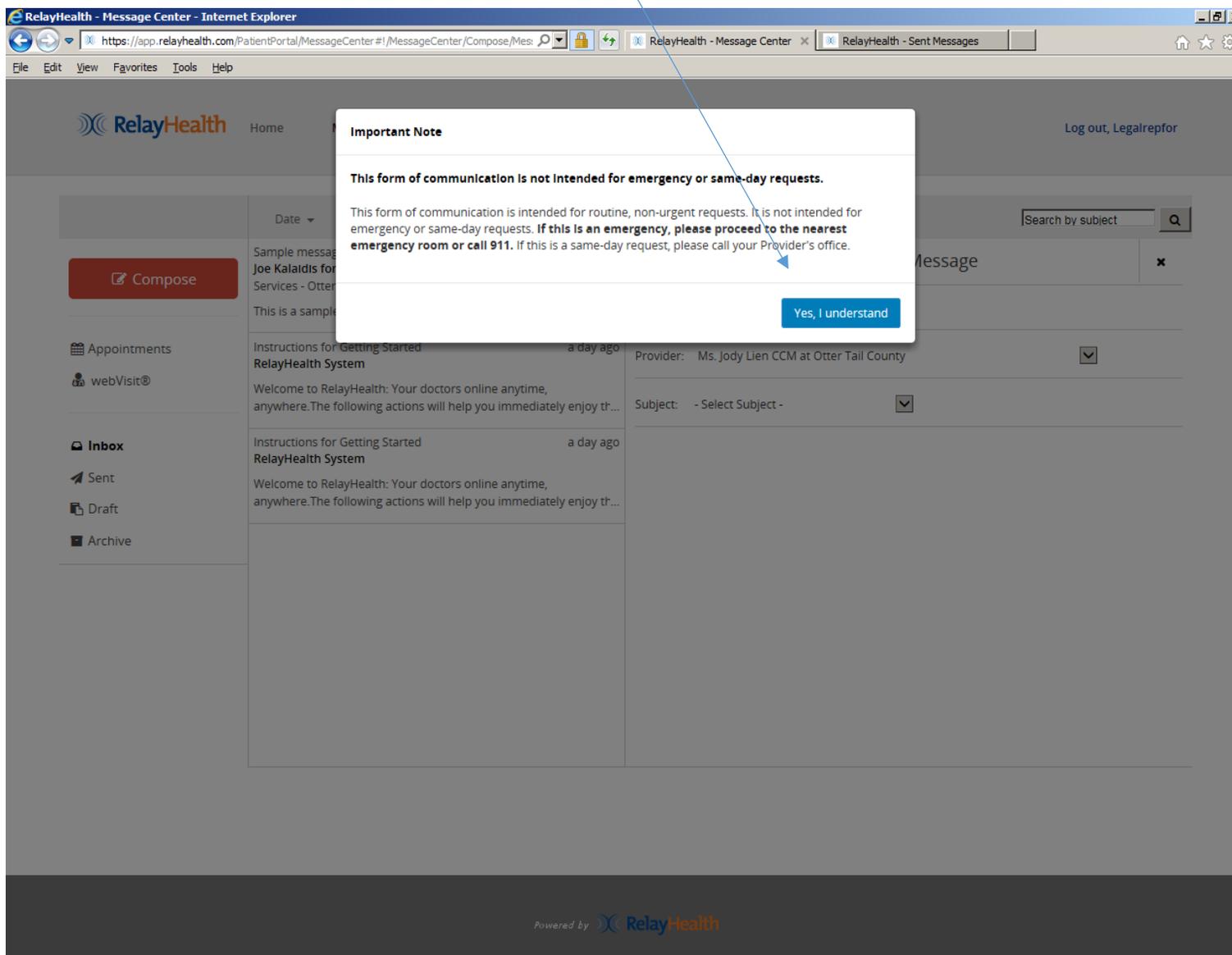
Then select the PROVIDER. The Otter Tail Case Manager appears twice, and either item can be selected.

The screenshot shows the RelayHealth Message Center interface in Internet Explorer. The browser address bar shows the URL: <https://app.relayhealth.com/PatientPortal/MessageCenter#/MessageCenter/Compose/Mes>. The page header includes the RelayHealth logo and navigation links: Home, Messages, Health Records, Providers, Account, and Log out, Legalrefor. The main content area is divided into a left sidebar and a main message area. The sidebar contains a 'Compose' button and a list of folders: Appointments, webVisit®, Inbox, Sent, Draft, and Archive. The main message area displays a list of messages. The first message is a 'Sample message in PHR' from 'Joe Kalaidis for Ms. Jody Lien CCM / MN Department of Human Services - Otter Tail', dated '12 minutes ago'. Below it are two messages from the 'RelayHealth System' dated 'a day ago'. The 'New Message' form is open on the right, showing a 'Send' button and a search box. The 'Patient' dropdown is set to 'Beneficiary Ottertail-R'. The 'Provider' dropdown is open, showing a list of providers: '- Select Provider -', 'Ms. Jody Lien CCM at Otter Tail County', and 'Ms. Jody Lien CCM at MN Department of Human Services - Otter Tail'. A blue arrow points from the text above to the 'Provider' dropdown menu.



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This screen displays when PROVIDER is selected. Click YES, I UNDERSTAND to proceed.



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Select SUBJECT from this dropdown list.

RelayHealth - Message Center - Internet Explorer

https://app.relayhealth.com/PatientPortal/MessageCenter #1/MessageCenter/Compose/Mes

Outreach - All Documents | RelayHealth - Message Center

File Edit View Favorites Tools Help

RelayHealth Home Messages Health Records Providers Account Log out, Legalrepfor

Date All Patients Search by subject

Compose

Appointments webVisit

Inbox Sent Draft Archive

Sample message in PHR Mar 15
Joe Kalaidis for Ms. Jody Lien CCM / MN Department of Human Services - Otter Tail
This is a sample message in the RelayHealth PHR.

Instructions for Getting Started Mar 14
RelayHealth System
Welcome to RelayHealth: Your doctors online anytime, anywhere. The following actions will help you immediately enjoy th...

New Message

Send

Patient: Beneficiary Ottertail-R

Provider: Ms. Jody Lien CCM at Otter Tail County

Subject:

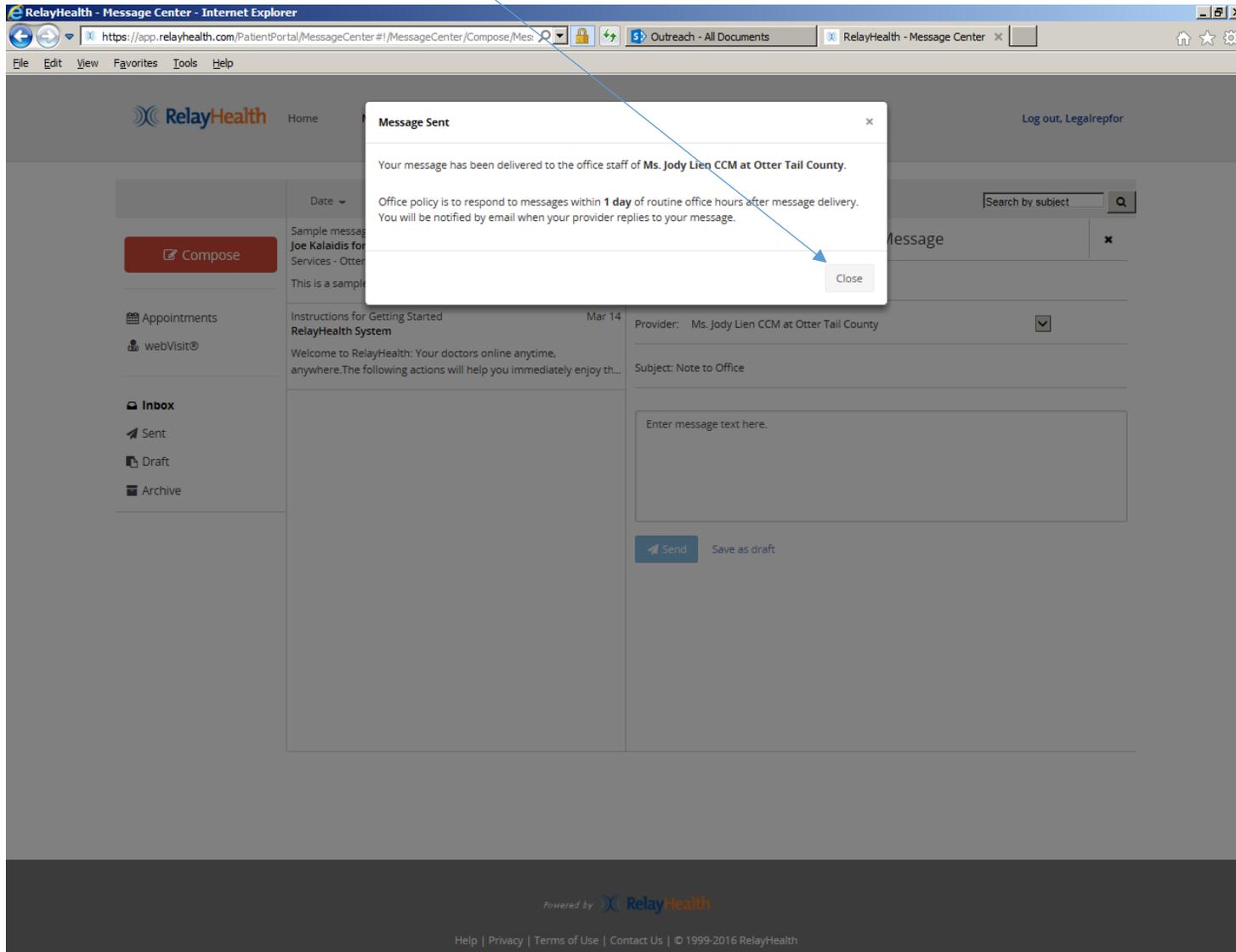
- Select Subject -
- Message Your Provider/Care Team
- Prescriptions
- Lab Results
- Referrals
- Message Office Staff
- Billing Questions
- Update Address or Insurance Info

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Enter message text, then click SEND.

The screenshot shows the RelayHealth Message Center interface in Internet Explorer. The browser address bar shows the URL: <https://app.relayhealth.com/PatientPortal/MessageCenter#/MessageCenter/Compose/Mes>. The page header includes the RelayHealth logo and navigation links: Home, Messages, Health Records, Providers, Account, and Log out, Legalrepfor. The main content area is divided into a left sidebar and a main panel. The sidebar contains a 'Compose' button, 'Appointments', 'webVisit', 'Inbox', 'Sent', 'Draft', and 'Archive'. The main panel displays a list of messages and a 'New Message' form. The 'New Message' form includes a 'Send' button, a search box, and fields for Patient (Beneficiary Ottertail-R), Provider (Ms. Jody Lien CCM at Otter Tail County), and Subject (Note to Office). A large text area for the message body contains the placeholder text 'Enter message text here.' Below the text area are 'Send' and 'Save as draft' buttons. Blue arrows point from the text 'Enter message text, then click SEND.' to the text area and the 'Send' button.

Confirmation that message was sent. Click CLOSE to continue.



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This is how the message appears in SENT items.

The screenshot shows the RelayHealth Message Center interface in Internet Explorer. The browser address bar displays the URL: <https://app.relayhealth.com/PatientPortal/MessageCenter#/MessageCenter/View/Message>. The page header includes the RelayHealth logo and navigation links: Home, Messages, Health Records, Providers, Account, and Log out, Legalrepfor. The main content area is divided into three sections: a left sidebar, a central message list, and a right message details pane. The left sidebar contains a 'Compose' button and a list of folders: Appointments, webVisit®, Inbox, Sent (highlighted with a blue arrow), Draft, and Archive. The central message list shows several messages, with the selected message being a 'Note to Office' from 'Ms. Jody Lien CCM / Otter Tail County' dated 'Mar 15'. The right pane displays the details of this message, including the sender 'Legalrepfor Ottertail-R', the recipient 'Ms. Jody Lien, CCM', and the subject 'Note to Office'. The message body contains the text 'Sample message to Case Manager.' and a 'MESSAGE THREAD' section with '1 Message'.

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Click if desired to change how messages are sorted.

RelayHealth - Message Center - Internet Explorer

https://app.relayhealth.com/PatientPortal/MessageCenter#/MessageCenter/View/Message

File Edit View Favorites Tools Help

RelayHealth Home Messages Health Records Providers Account Log out. Legalrepfor

Compose

Appointments

webVisit

Inbox

Sent

Draft

Archive

Date All Patients Search by subject

Date 3 minutes ago

From: Legalrepfor Ottertail-R

To: Ms. Jody Lien, CCM

4/6/2017 10:36:13 AM

Subject 12 minutes ago

Ms. Jody Lien CCM / MN Department of Human Services - Otter Tail

Note to Office

Enter reply to message here.

Enter message text here.

Patient request to use RelayHealth PioneerCare / PioneerCare Mar 21

Please accept or decline this patient

MESSAGE THREAD Expand all

Note to Office Mar 15

Ms. Jody Lien CCM / Otter Tail County

1 Message

RE: Sample message in PHR Mar 15

Ms. Jody Lien CCM / MN Department of Human Services - Otter Tail

This is the reply text for this message.

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Click to ARCHIVE the message to remove it from this view if desired. Note that messages are never deleted from the RelayHealth PHR.

RelayHealth - Message Center - Internet Explorer

https://app.relayhealth.com/PatientPortal/MessageCenter#/MessageCenter/View/Message

File Edit View Favorites Tools Help

RelayHealth Home Messages Health Records Providers Account Log out, Legalrepfor

Date All Patients Search by subject

Compose

Appointments webVisit@

Inbox Sent Draft Archive

Sample message in PHR 2 days ago
Joe Kalaidis for Ms. Jody Lien CCM / MN Department of Human Services - Otter Tail
This is a sample message in the RelayHealth PHR.

Instructions for Getting Started Mar 14
RelayHealth System
Welcome to RelayHealth: Your doctors online anytime, anywhere. The following actions will help you immediately enjoy th...

Instructions for Getting Started Mar 14
RelayHealth System
Welcome to RelayHealth: Your doctors online anytime, anywhere. The following actions will help you immediately enjoy th...

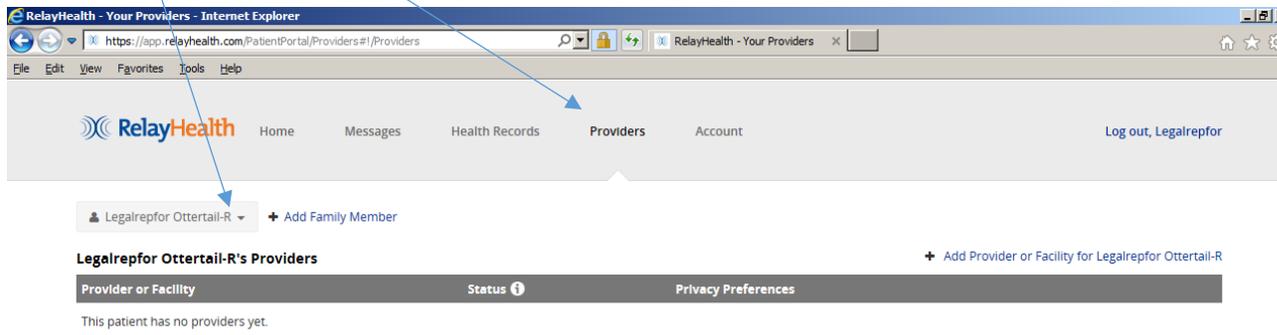
From: Joe Kalaidis 3/15/2017 8:02:46 AM
For: Ms. Jody Lien CCM at MN Department of Human Services - Otter Tail
To: Beneficiary Ottertail-R
Sample message in PHR
This is a sample message in the RelayHealth PHR.

MESSAGE THREAD Expand all
2 Messages



PROVIDERS:

Click on PROVIDERS to see this screen, which lists all provider organizations contributing to Personal Health Record. There are no providers listed for the Legal or Authorized Representative because he/she is working on behalf of the beneficiary. Click on the down arrow to display the Beneficiary's providers. As noted previously, all views of the PHR display the legal or authorized representative view as the default. Click on the dropdown to see the beneficiary view on all screens.



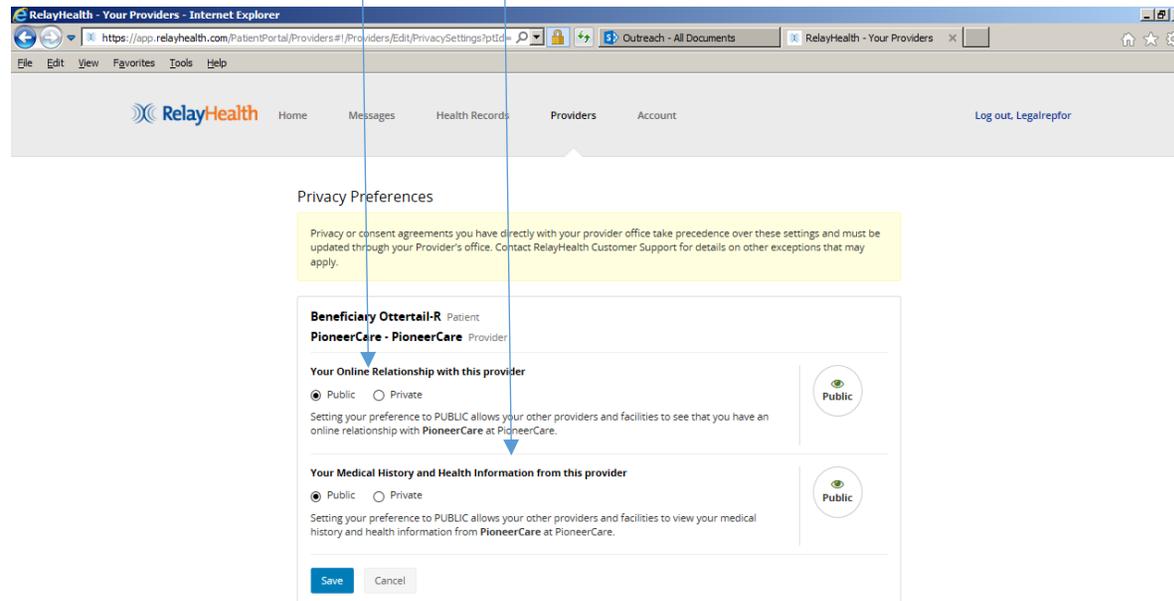
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This screen shows the Beneficiary's providers. Click on PRIVACY PREFERENCES for the desired line to display the next screen.

The screenshot shows the RelayHealth patient portal interface. At the top, there is a navigation bar with the RelayHealth logo and links for Home, Messages, Health Records, Providers, and Account. A 'Log out, Legalrepfor' link is also present. Below the navigation bar, there is a dropdown menu for the beneficiary, currently set to 'Beneficiary Ottertail-R', and a '+ Add Family Member' link. The main content area is titled 'Beneficiary Ottertail-R's Providers' and includes a '+ Add Provider or Facility for Beneficiary Ottertail-R' link. A table lists the providers with columns for 'Provider or Facility', 'Status', 'Privacy Preferences', and 'Remove'. A blue arrow points to the 'Privacy Preferences' link for the first provider, PioneerCare.

Provider or Facility	Status	Privacy Preferences	Remove
PioneerCare	Pending	Public - Public	Remove
Ms. Jody Lien CCM Otter Tail County	Approved	Public - Public	Remove
Ms. Jody Lien CCM MN Department of Human Services - Otter Tail	Approved	Public - Public	Remove

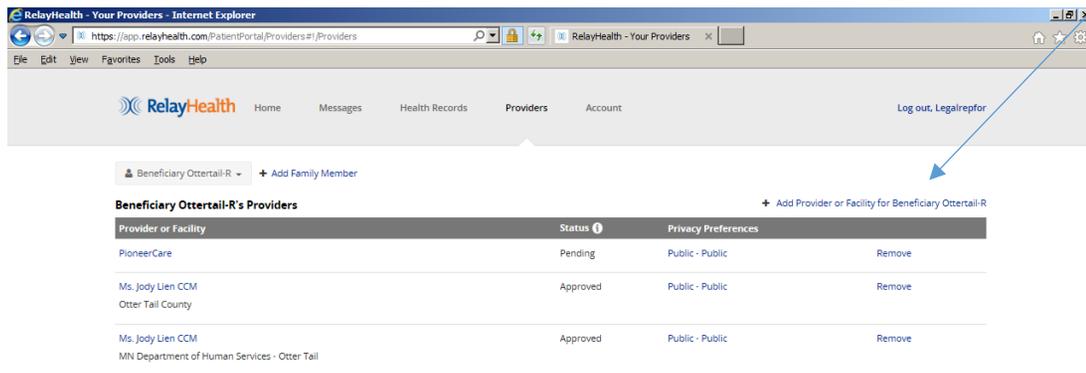
Privacy Preferences: The first setting identifies whether or not the beneficiary's other providers or staff can see that there is a relationship with this provider or organization. The second setting identifies whether the beneficiary's other providers or staff can view medical history and health information from this provider or organization. The standard or default settings are PUBLIC-PUBLIC. Please note that "PUBLIC" means "SHARED", not that it is available to anyone over the internet, but that it is available only to the beneficiary's other providers and staff in this Personal Health Record. PUBLIC-PUBLIC provides full access to the PHR (including documents) for all provider organizations contributing to the Beneficiary's PHR record. Click to change the preference if desired. Please note that if the you upload any document to the PHR, any of the beneficiary's providers or staff members will be able see the document regardless of the privacy preferences.



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To add a relationship with another Fergus Falls provider organization that is participating in this demonstration project, click on ADD PROVIDER OR FACILITY to get the next screen. In addition to Otter Tail County, participants include:

- Fergus Falls Community Behavioral Health Hospital
- Lake Region Healthcare
- Lakeland Mental Health Center
- LB Homes
- PioneerCare
- Productive Alternatives



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Enter all or part of the provider organization name, then click SEARCH. In this example, the search is for Lake Region Healthcare. Zip code is optional.

RelayHealth - Your Providers - Internet Explorer

https://app.relayhealth.com/PatientPortal/Providers#1/Providers/Add/ProviderOrFacility?pti...

File Edit View Favorites Tools Help

RelayHealth Home Messages Health Records Providers Account Log out, Legalrepor

Add Provider or Facility for Beneficiary Ottetail-R

At least one field is required. Enter the full or partial name or ZIP code for your Provider. If your Facility allows connecting directly with the Facility, you may enter the Facility name.

Your Provider or Facility may not have registered for RelayHealth yet, or may have decided to be listed as Private, and will therefore not show up in the search results. If you cannot locate your Provider or Facility in the search, please reach out to them directly for additional information.

Search for Provider or Facility

Lake Region Healthcare

Zip Code

Searches within 50 miles of this Zip Code

[Advanced Search](#)

Search Cancel

Click SELECT for desired Provider organization. The search results may contain other organizations, depending on what is entered. For example, if zip code is not entered, the results may include organization in other states.

RelayHealth - Your Providers - Internet Explorer

https://app.relayhealth.com/PatientPortal/Providers#1/Providers/Add/ProviderOrFacility?pt...

File Edit View Favorites Tools Help

RelayHealth Home Messages Health Records Providers Account Log out, Legalrepfor

Add Provider or Facility for Beneficiary Otttertail-R

At least one field is required. Enter the full or partial name or ZIP code for your Provider. If your Facility allows connecting directly with the Facility, you may enter the Facility name.

Your Provider or Facility may not have registered for RelayHealth yet, or may have decided to be listed as Private, and will therefore not show up in the search results. If you cannot locate your Provider or Facility in the search, please reach out to them directly for additional information.

Search for Provider or Facility

Lake Region Healthcare

Zip Code

Searches within 50 miles of this Zip Code

[Advanced Search >](#)

Search Cancel

Your search found 1 results

Name and Specialty	Address	
Lake Region Healthcare	Lake Region Healthcare 712 Cascade Street Fergus Falls, MN 56537	Select

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The added provider now shows in the list. Note that STATUS is PENDING confirmation by the Provider organization. When the Provider organization accepts the request, the status will change to APPROVED, and at that point messages can be exchanged, and the Provider organization will have access to the beneficiary's PHR information.

RelayHealth - Your Providers - Internet Explorer

https://app.relayhealth.com/PatientPortal/Providers#!Providers

RelayHealth Home Messages Health Records Providers Account Log out, Legalrepfor

Beneficiary Ottertail-R + Add Family Member

A request to add Lake Region Healthcare to Your Providers has been sent and you will be notified once the request is accepted.

Beneficiary Ottertail-R's Providers + Add Provider or Facility for Beneficiary Ottertail-R

Provider or Facility	Status	Privacy Preferences	
Lake Region Healthcare	Pending	Public - Public	Remove
PioneerCare	Pending	Public - Public	Remove
Ms. Jody Lien CCM Otter Tail County	Approved	Public - Public	Remove
Ms. Jody Lien CCM MN Department of Human Services - Otter Tail	Approved	Public - Public	Remove

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HEALTH RECORDS:

Click HEALTH RECORDS, then click on the desired section of Health Records. For example, click on MEDICATION & ALLERGIES to get the next screen.

The screenshot shows the RelayHealth patient portal interface in Internet Explorer. The browser address bar displays <https://app.relayhealth.com/PatientPortal/#/Home>. The navigation bar includes the RelayHealth logo, Home, Messages, Health Records, Providers, Account, and Log out, Legalrepfor. The Health Records menu is expanded, showing the following options:

- Clinical Data**
 - Medications & Allergies
 - Problems & Procedures
 - Results
 - Vitals
 - Family & Social History
 - Immunizations
 - Documents
 - Blood Glucose
- Actions**
 - Update Personal Information
 - Manage Family Members
- More Options**
 - Manage and review additional health record information

Below the menu, there are two main sections:

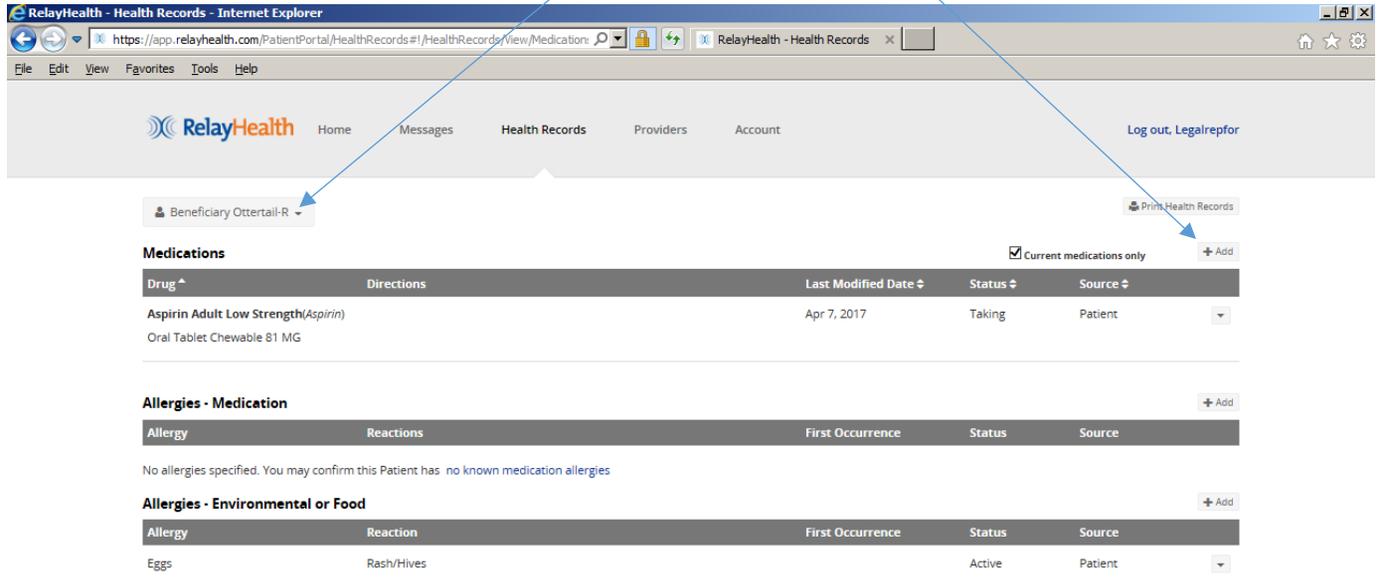
- HEALTH RECORDS**: Lab results, medications and more
- MESSAGES**: Message your Providers or Care Team

At the bottom of the page, there are two service buttons:

- DOWNLOAD MY DATA**: Export or Download Health Data
- ADDITIONAL SERVICES**: Pay bills and other services

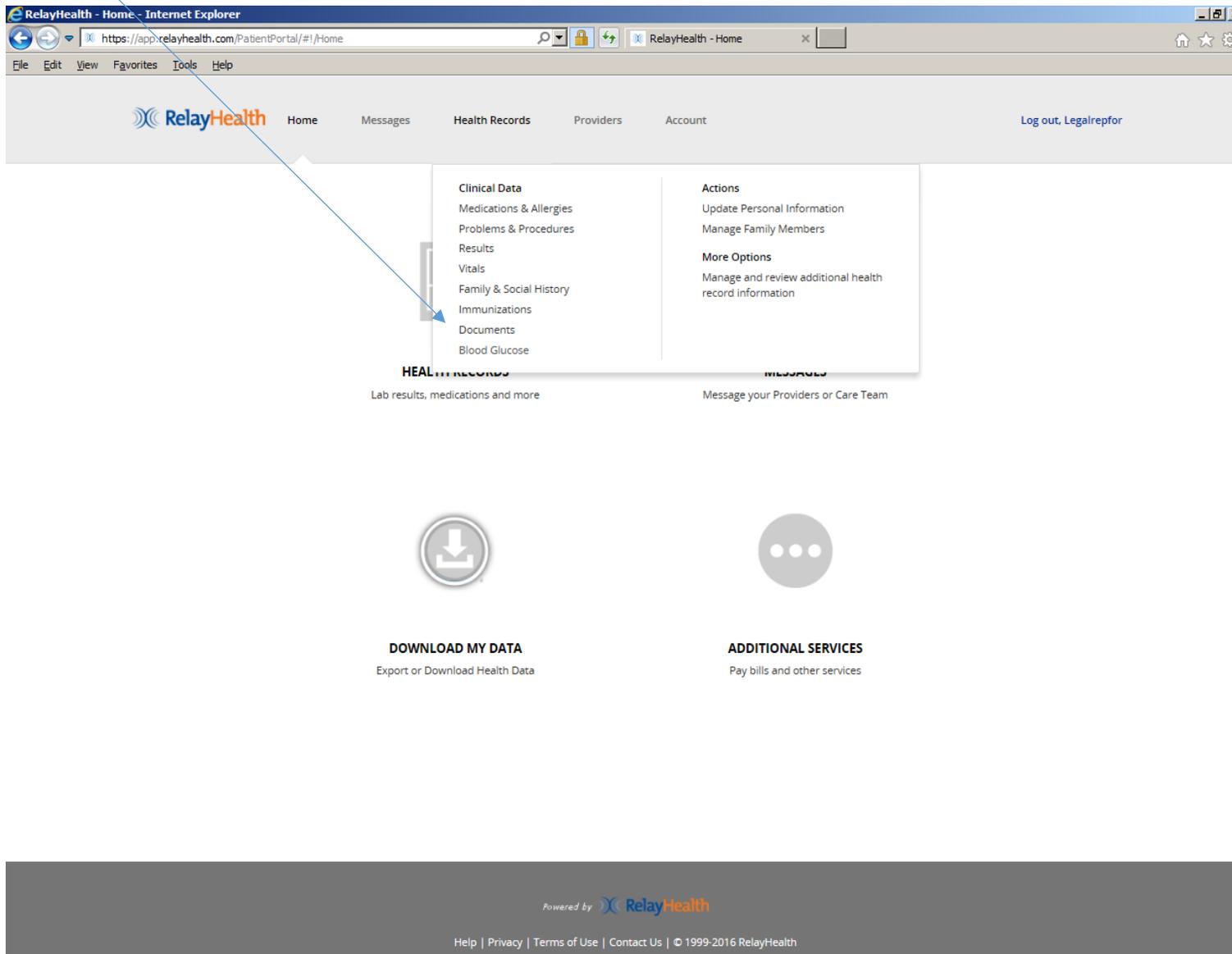
The footer contains the text: Powered by RelayHealth, Help | Privacy | Terms of Use | Contact Us | © 1999-2016 RelayHealth

This screen shows how Medications and Allergies appear. Click ADD to enter new items. Click on the other sections of HEALTH RECORDS to get similar views. As with the other views, click on the dropdown arrow to display the Beneficiary's information. Once again, all views of the PHR display the legal or authorized representative view as the default view, so you will need to click on the Patient dropdown to see the beneficiary view on all screens.



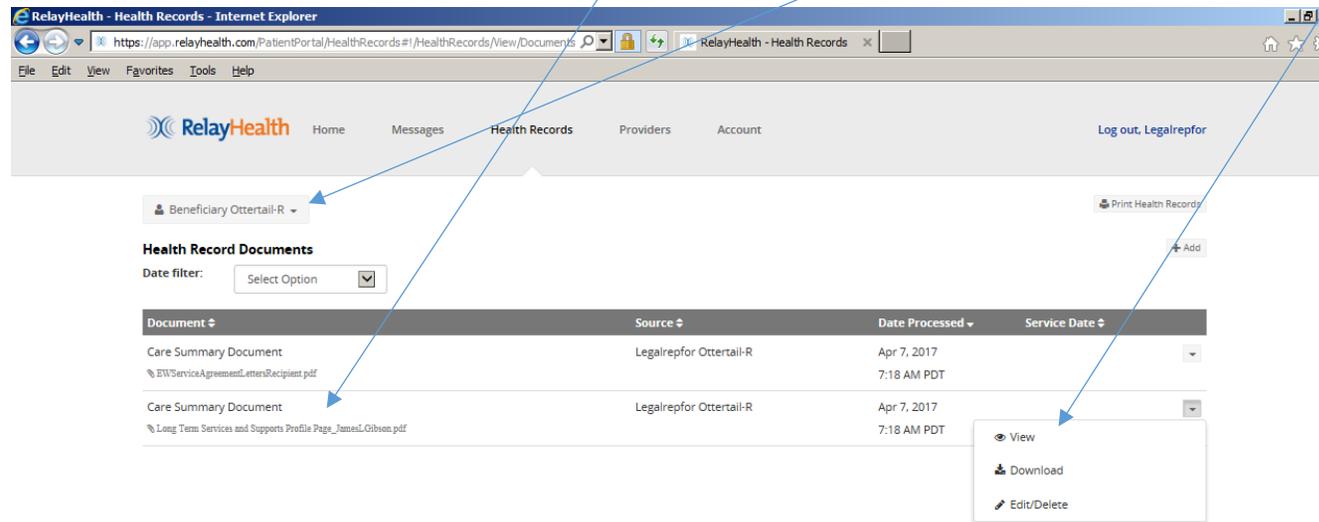
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Click DOCUMENTS to get the next screen.



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This is a list of sample DOCUMENTS. The second document shown (DHS Profile Page) will be loaded automatically by DHS. The other document is a sample of documents that can be added (uploaded) by Beneficiaries or their designated representatives. Click on VIEW within the dropdown box to view the document. As noted previously, a legal or other authorized representative for a beneficiary will have an account with the Beneficiary as a DEPENDENT on the representative's account. Click on the dropdown below to switch between documents for the representative (if any) and the beneficiary.



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This is a sample of the new DHS Profile page.

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

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Click on the dropdown box to see the functions available for the document. For example, click **DOWNLOAD** to save a copy of the document to the legal or authorized representative's computer.

The screenshot shows the RelayHealth Health Records interface in Internet Explorer. The browser address bar displays <https://app.relayhealth.com/PatientPortal/HealthRecords#?HealthRecords/View/Documents>. The page header includes the RelayHealth logo and navigation links: Home, Messages, Health Records, Providers, and Account. A user profile dropdown shows 'Beneficiary Ottertail-R'. A 'Print Health Records' button is visible. The main content area is titled 'Health Record Documents' and includes a 'Date filter' dropdown set to 'Select Option'. Below this is a table with columns: Document, Source, Date Processed, and Service Date. Two rows of documents are listed, both from 'Legalrepfor Ottertail-R' and dated 'Apr 7, 2017 7:18 AM PDT'. A dropdown menu is open for the 'Service Date' of the second document, showing options: View, Download, and Edit/Delete. Blue arrows point from the text above to the dropdown menu and the 'Download' option.

Document	Source	Date Processed	Service Date
Care Summary Document EWServiceAgreement.LetterRecipient.pdf	Legalrepfor Ottertail-R	Apr 7, 2017 7:18 AM PDT	
Care Summary Document Long Term Services and Supports Profile Page_JamesL.Gibson.pdf	Legalrepfor Ottertail-R	Apr 7, 2017 7:18 AM PDT	

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Documents can be sorted in ascending or descending order in different ways by clicking on the desired column header in the list. In this example, all documents were added (uploaded) by the legal or authorized representative, as shown in SOURCE. Documents added by DHS and other Provider organizations are identified accordingly.

The screenshot shows the RelayHealth Health Records interface. At the top, there is a navigation bar with the RelayHealth logo and links for Home, Messages, Health Records, Providers, and Account. A user is logged in as 'Beneficiary Ottertail-R'. Below the navigation bar, there is a 'Print Health Records' button and an '+ Add' button. A 'Date filter' dropdown menu is set to 'Select Option'. The main content area displays a table of 'Health Record Documents' with the following columns: Document, Source, Date Processed, and Service Date. Two documents are listed, both with the source 'Legalrepfor Ottertail-R' and a date of 'Apr 7, 2017 7:18 AM PDT'. Blue arrows from the text above point to the 'Document', 'Source', and 'Date Processed' column headers.

Document	Source	Date Processed	Service Date
Care Summary Document EWServiceAgreementLetersRecipient.pdf	Legalrepfor Ottertail-R	Apr 7, 2017 7:18 AM PDT	
Care Summary Document Long Term Services and Supports Profile Page_JamesL.Gibson.pdf	Legalrepfor Ottertail-R	Apr 7, 2017 7:18 AM PDT	

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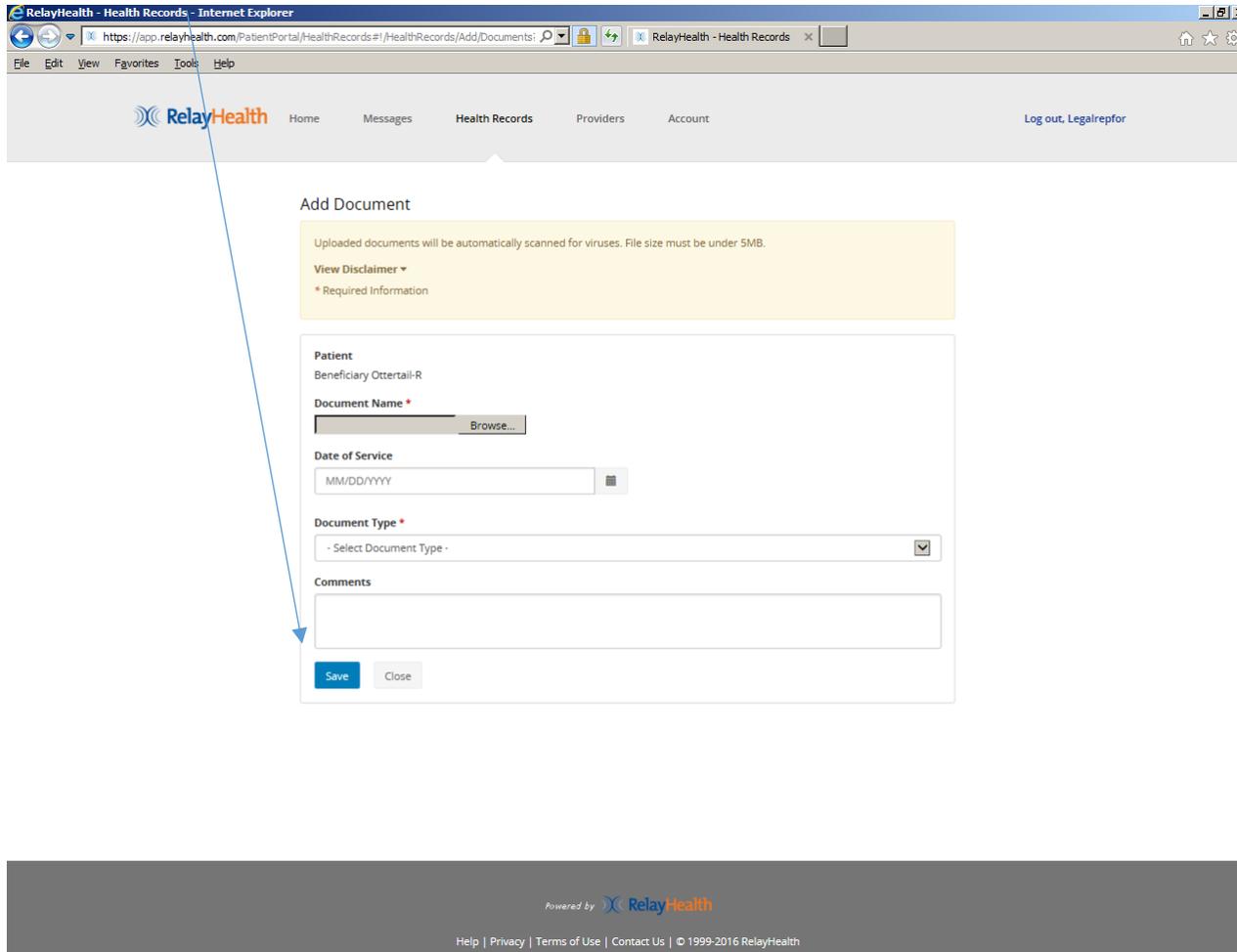
To add (upload) a document, click ADD to get the next screen.

The screenshot shows the RelayHealth Health Records interface in Internet Explorer. The browser address bar shows the URL: https://app.relayhealth.com/PatientPortal/HealthRecords#/HealthRecords/View/Documents. The page header includes the RelayHealth logo and navigation links: Home, Messages, Health Records, Providers, Account, and Log out, Legalrepfor. Below the header, there is a dropdown menu for the beneficiary name, currently set to "Beneficiary Ottertail-R". To the right of this menu is a "Print Health Records" button. Below the beneficiary information is the "Health Record Documents" section, which includes a "Date filter" dropdown menu set to "Select Option". A blue arrow points from the text above to the "+ Add" button in the top right corner of the document list. The document list is a table with the following data:

Document	Source	Date Processed	Service Date
Care Summary Document EWServiceAgreementLettersRecipient.pdf	Legalrepfor Ottertail-R	Apr 7, 2017 7:18 AM PDT	
Care Summary Document Long Term Services and Supports Profile Page_JamesL.Gibson.pdf	Legalrepfor Ottertail-R	Apr 7, 2017 7:18 AM PDT	

Adding (uploading) a document – continued:

1. DOCUMENT NAME: click BROWSE to identify the document to be added from your computer.
2. DATE OF SERVICE: this is optional.
3. DOCUMENT TYPE: Select from the dropdown list.
4. COMMENTS: this is optional.
5. Click SAVE.



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Click PRINT HEALTH RECORDS to view the entire record.

The screenshot shows the RelayHealth Health Records interface. At the top, there is a navigation bar with the RelayHealth logo and menu items: Home, Messages, Health Records, Providers, and Account. A 'Log out, Legalrepfor' link is also present. Below the navigation bar, the user is identified as 'Beneficiary Ottertail-R'. The main section is titled 'Health Record Documents' and includes a 'Date filter' dropdown menu. A table lists two documents, both from 'Legalrepfor Ottertail-R' and dated 'Apr 7, 2017'. A 'Print Health Records' button is located in the top right of the document list area.

Document	Source	Date Processed	Service Date
Care Summary Document EWServiceAgreementLettersRecipient.pdf	Legalrepfor Ottertail-R	Apr 7, 2017 7:18 AM PDT	
Care Summary Document Long Term Services and Supports Profile Page_JamesL.Gibson.pdf	Legalrepfor Ottertail-R	Apr 7, 2017 7:18 AM PDT	

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Page 1 of 4 pages of the complete record. Click PRINT if desired for a printed copy. Note HEALTH CONSIDERATIONS. In this example, LIVING WILL and ADVANCE DIRECTIVE are both yes. In this scenario, it will be helpful if the legal or authorized representative also adds (uploads) these documents.

RelayHealth - Patient Health Record - Internet Explorer
https://app.relayhealth.com/Patients/PHR/PatientPrintHealthRecord.aspx?ptid=114397359

Print Close

Page 1 | 2 | 3 | 4 |

Beneficiary Ottertail-R - DOB Jan 1, 1950 - Male Printed: Apr 07, 2017

Personal Information Last Updated: Never

Beneficiary Ottertail-R 1500 Lincoln Avenue Fergus Falls, Minnesota, 56537 United States Home: 952-486-1201 Mobile: Fax: Email: ottertail.r@gmail.com Alternate Email:	Height: Weight: (lbs) Administrative Sex: Male Marital/Relationship Status: Number of Children: MRN: Last Office Visit: Last Visit Complaint:	Birth Date: Jan 1, 1950 Death Date: Birth Place: Race: Ethnicity: Former or Maiden Name:
--	--	---

Emergency Contact **Employer** **Health Considerations**

Legalrepfor Ottertail-R Relationship: Phone Numbers:	Organization: Occupation: Work Phone Number:	Living Will: Yes Advance Directive: Yes Organ Donor Program: No Religious Beliefs Influencing Medical Treatment: No
--	--	---

Primary Health Plan **Previous Physicians**

Not Available	None Reported
---------------	---------------

Medical Information

Problems Last updated: Never None Reported	Allergies Last updated: Apr 7, 2017 Eggs - Rash/Hives	Immunizations Last updated: Never None Reported
---	--	--

Medications Last updated: Apr 7, 2017 Aspirin Adult Low Strength - Oral Tablet Chewable 81 MG	Family Health History Last updated: Never None Reported
--	--

Surgeries, Procedures, Tests Last updated: Never None Reported 0	Health Record Files Last updated: Apr 7, 2017 Long Term Services and Supports Profile Page_JamesLGibson.pdf EWSserviceAgreementLettersRecipient.pdf	Personal Information Files Last updated: Never None Reported
--	--	---

Health Habits Last Updated: Never

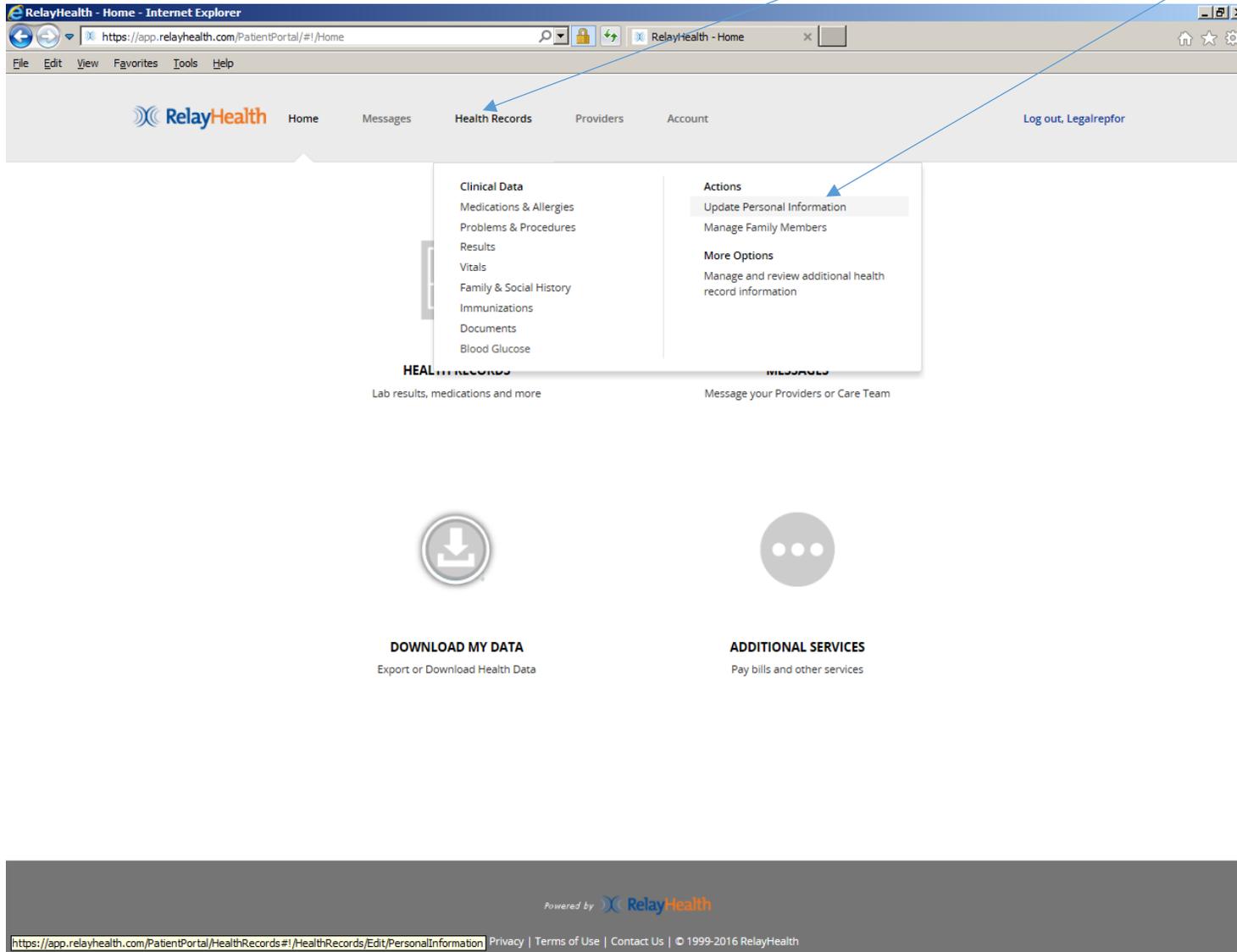
None Reported

Print Close

Page 1 | 2 | 3 | 4 |

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To update personal information (including Living Will and Advanced Directive), click on HEALTH RECORDS, then click UPDATE PERSONAL INFORMATION.



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Click on the desired section to add or edit information. For example, click on HEALTH CONSIDERATIONS to update Living Will and/or Advance Directive.

Do not update name, address, zip code, date of birth, or gender (“Administrative Sex”). If these items need to be changed, please contact your Otter Tail County Case Manager.

The screenshot shows a web browser window with the URL <https://app.relayhealth.com/PatientPortal/HealthRecords#1/HealthRecords/Edit/PersonalInf>. The page title is "RelayHealth - Health Records - Internet Explorer". The main content area is titled "Enter/Modify Your Personal Information" and contains a form with the following sections:

- Personal Information**
 - Title: Select Title
 - First Name: Logginsfor
 - Middle Name: OtterTail-0
 - Last Name: OtterTail-0
 - Former / Birth Name: OtterTail-0
 - Date of Birth: January 1, 1950
 - Date of Death: Month, Day, Year
 - Administrative Sex: Male
 - Gender Identity: I
 - Height: ft., in.
 - Weight: lbs., kg.
 - Preferred Language: Select Language
 - Race: Select Race
 - Ethnicity: Select Ethnicity
 - Marital/Relationship Status: Select Status
 - Number of Children: [input field]
 - Place of Birth: [input field]
- Contact**
- Emergency Contact**
- Current Care Provider**
- Previous Providers**
- Health Insurance and Guarantor**
- Employment**
- Health Considerations**

At the bottom of the form, there are "Save" and "Cancel" buttons. A blue arrow points from the text above to the "Health Considerations" section.

Update HEALTH CONSIDERATIONS below by clicking on the buttons.

The screenshot shows a web browser window with the URL <https://app.relayhealth.com/PatientPortal/HealthRecords#/HealthRecords/Edit/PersonalInf>. The page header includes the RelayHealth logo and navigation links: Home, Messages, Health Records, Providers, Account, and Log out, Legalrepfor. A dropdown menu shows the user as 'Beneficiary Ottertail-R'. The main content area is titled 'Enter/Modify Your Personal Information' and contains a list of sections: Personal Information, Contact, Emergency Contact, Current Care Provider, Previous Providers, Health Insurance and Guarantor, Employment, and Health Considerations. The 'Health Considerations' section is expanded and contains the following text and form elements:

This optional information may be useful to your doctor in determining appropriate health care for you.

Do you have a living will?
 Yes No Unspecified

Do you have an Advance Healthcare Directive?
 Yes No Unspecified

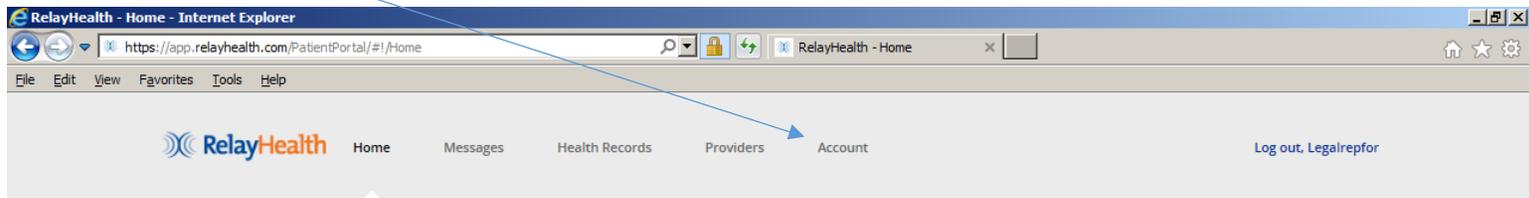
Are you part of an Organ Donor program?
 Yes No Unspecified

Do you have any personal or religious beliefs that could influence your health care?
 Yes No Unspecified

At the bottom of the 'Health Considerations' section are two buttons: 'Save' and 'Cancel'.

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Click ACCOUNT to get the next screen.



HEALTH RECORDS

Lab results, medications and more



MESSAGES

Message your Providers or Care Team



DOWNLOAD MY DATA

Export or Download Health Data



ADDITIONAL SERVICES

Pay bills and other services

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This screen provides the ability to update basic account information, including password and security questions, and language preference. Click EDIT and update as needed. Do not update address or date of birth; contact the Otter Tail County Case Manager if those items need to be changed.

RelayHealth - Account - Internet Explorer

https://app.relayhealth.com/PatientPortal/Account#/Account

RelayHealth Home Messages Health Records Providers Account Log out, Legalrepfor

Account

To update your health record, click the Health Records menu. To add family members to your account, go to the Providers menu.

Account Information

		Action
User ID	ottertail.r@gmail.com	Edit
Password	*****	Edit
Security Questions		Edit
Address	1500 Lincoln Avenue Fergus Falls, MN 56537	Edit
Time Zone	UTC-6	Edit
Phone Numbers	Home - 952-486-1201	Edit
Email Address	ottertail.r@gmail.com	Edit
Date of Birth	Jan 1, 1950	Edit
Preferred Display Language	English	Edit

Communication Preferences

		Action
Preferred Communication Method	Home Phone	Edit
Receive Broadcast Messages	Yes	Edit

Pharmacies

		Action
Preferred Pharmacy	Walgreens Drug Store 12592 326 W LINCOLN AVE FERGUS FALLS, MN 565372027 Phone:2187361028 Fax:2187367175	Edit Delete
Alternate Pharmacy	No alternate pharmacy specified	Add

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.

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.

