**DEPARTMENT OF
HUMAN SERVICES**
TEFT — TESTING EXPERIENCE
AND FUNCTIONAL TOOLS

**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 than 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.

November 2017
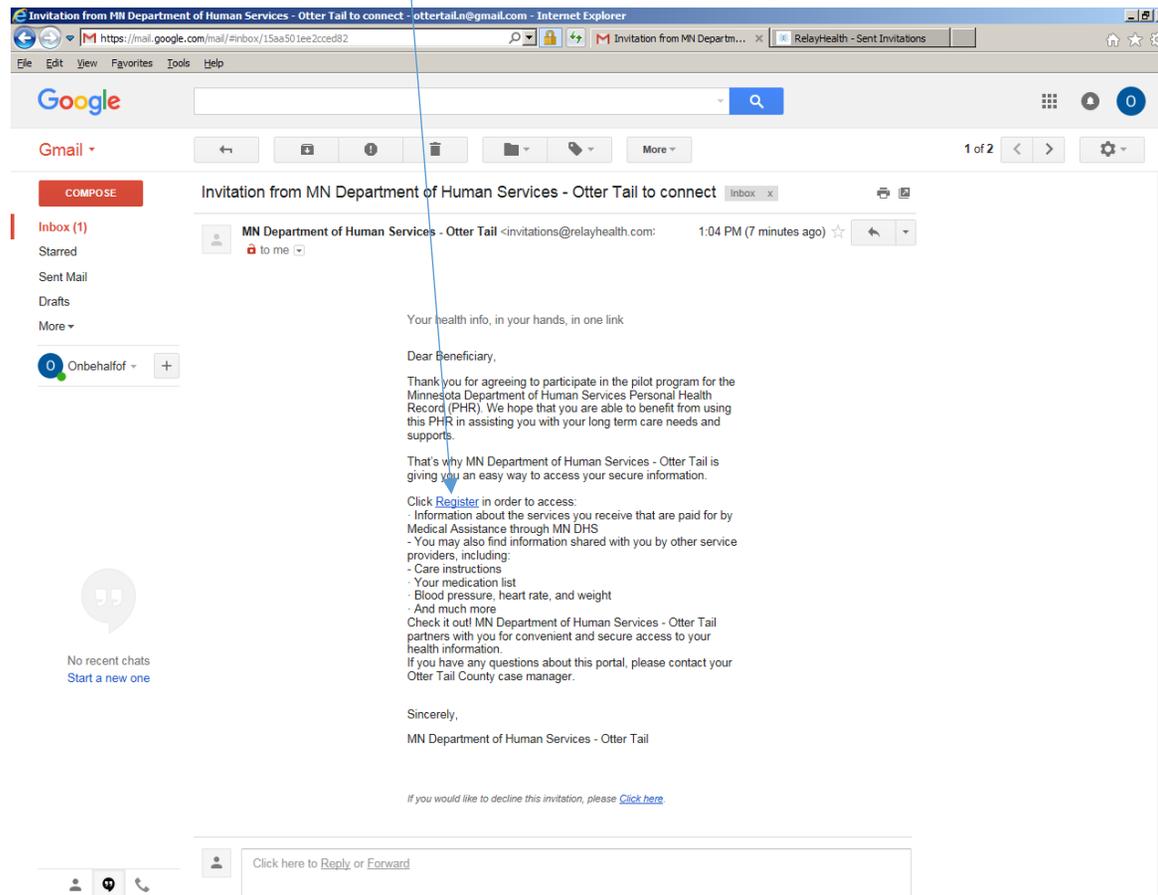
The Legal or Authorized Representative clicks on THIS IS FOR MY DEPENDENT (Beneficiary). Please note that "DEPENDENT" is the term used in the RelayHealth PHR to identify a Beneficiary when a Legal or Authorized represerive is using the PHR on behalf of the Beneficiary. It does not automatically mean that the Beneficiary is a dependent in the legal or financial sense of the term "dependent".
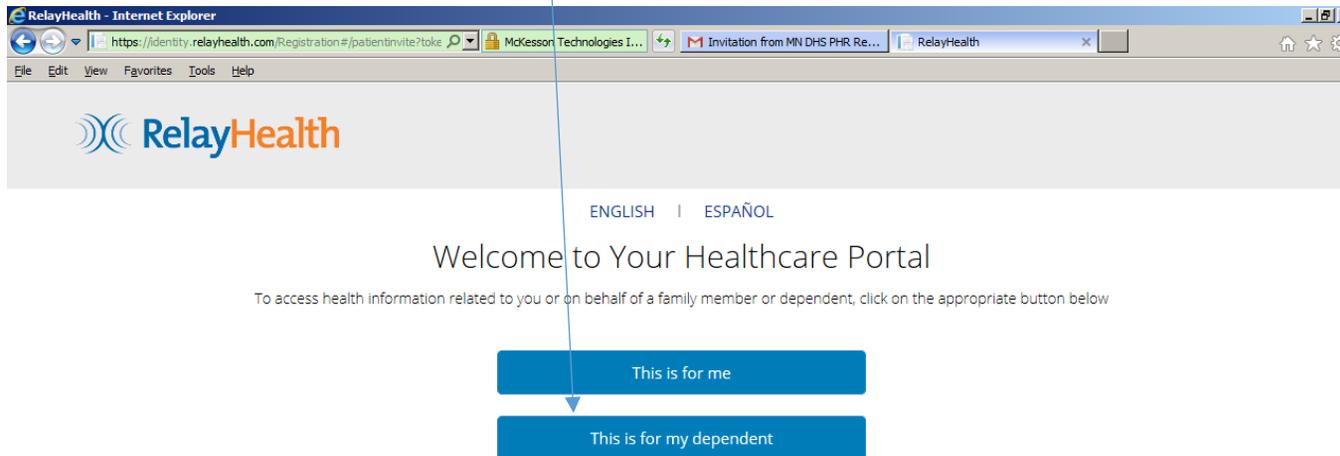
November 2017

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.
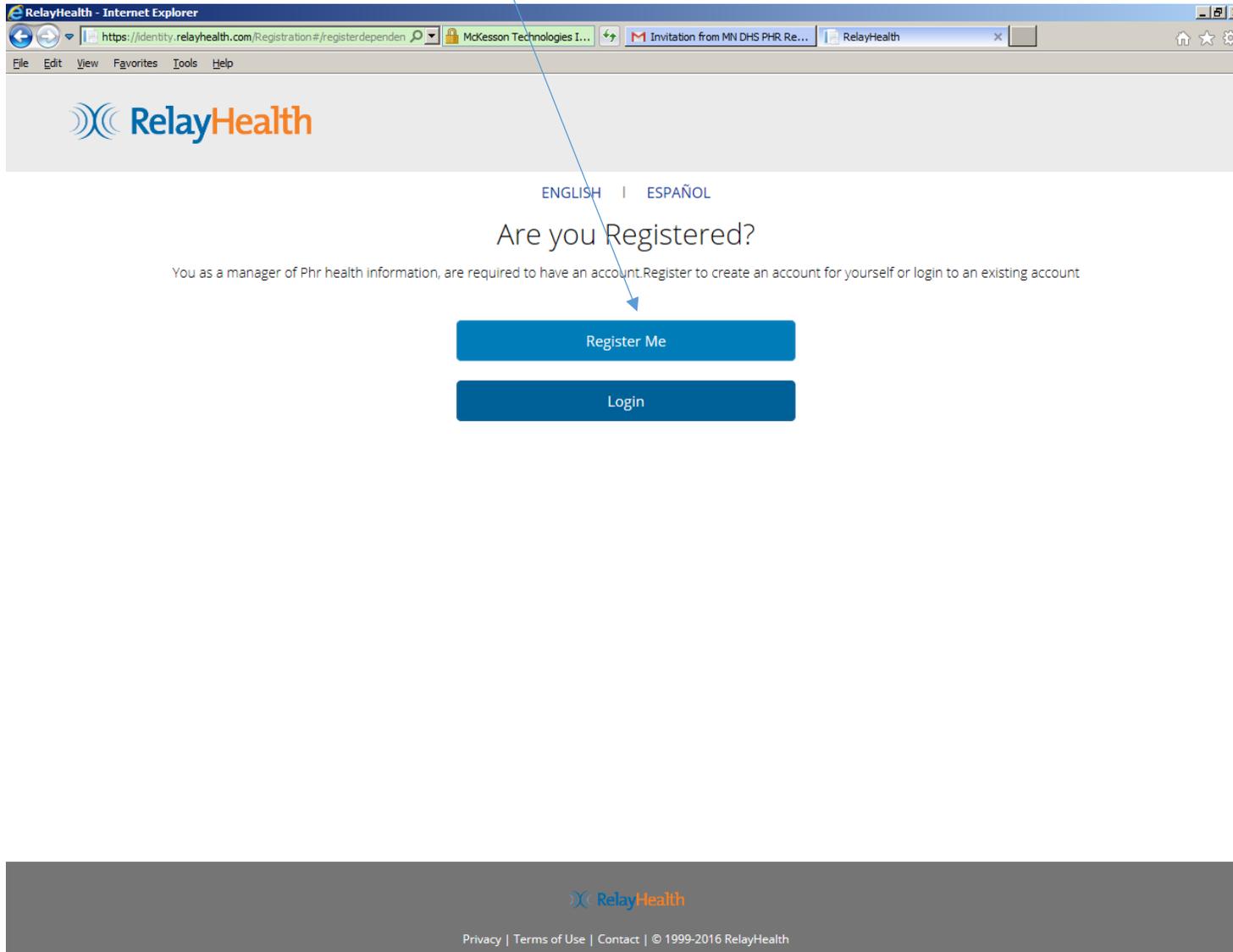
November 2017

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.

November 2017

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

November 2017

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.
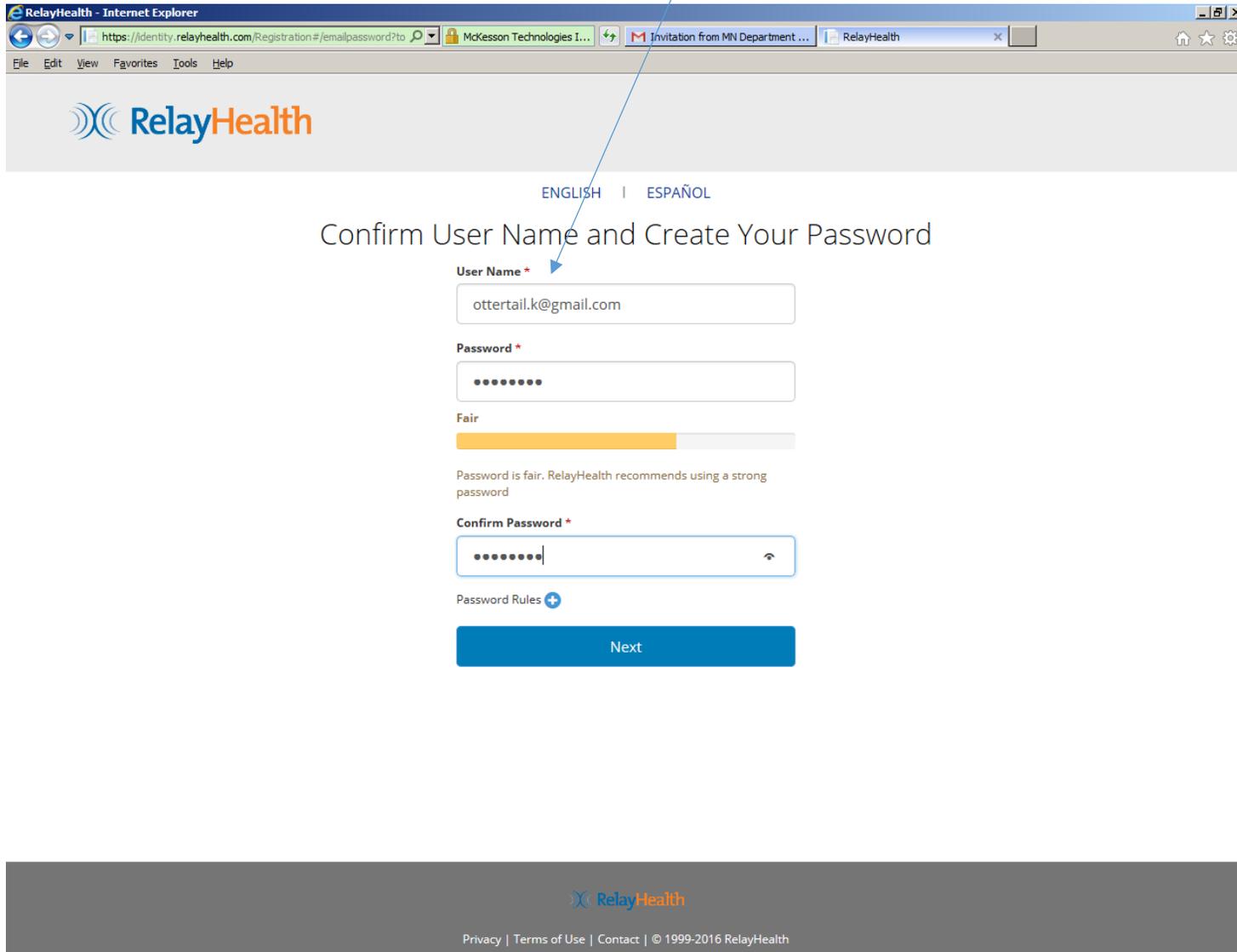
November 2017

The Legal or Authorized Representative selects security questions and enters answers. This information is used for identity verification if needed.
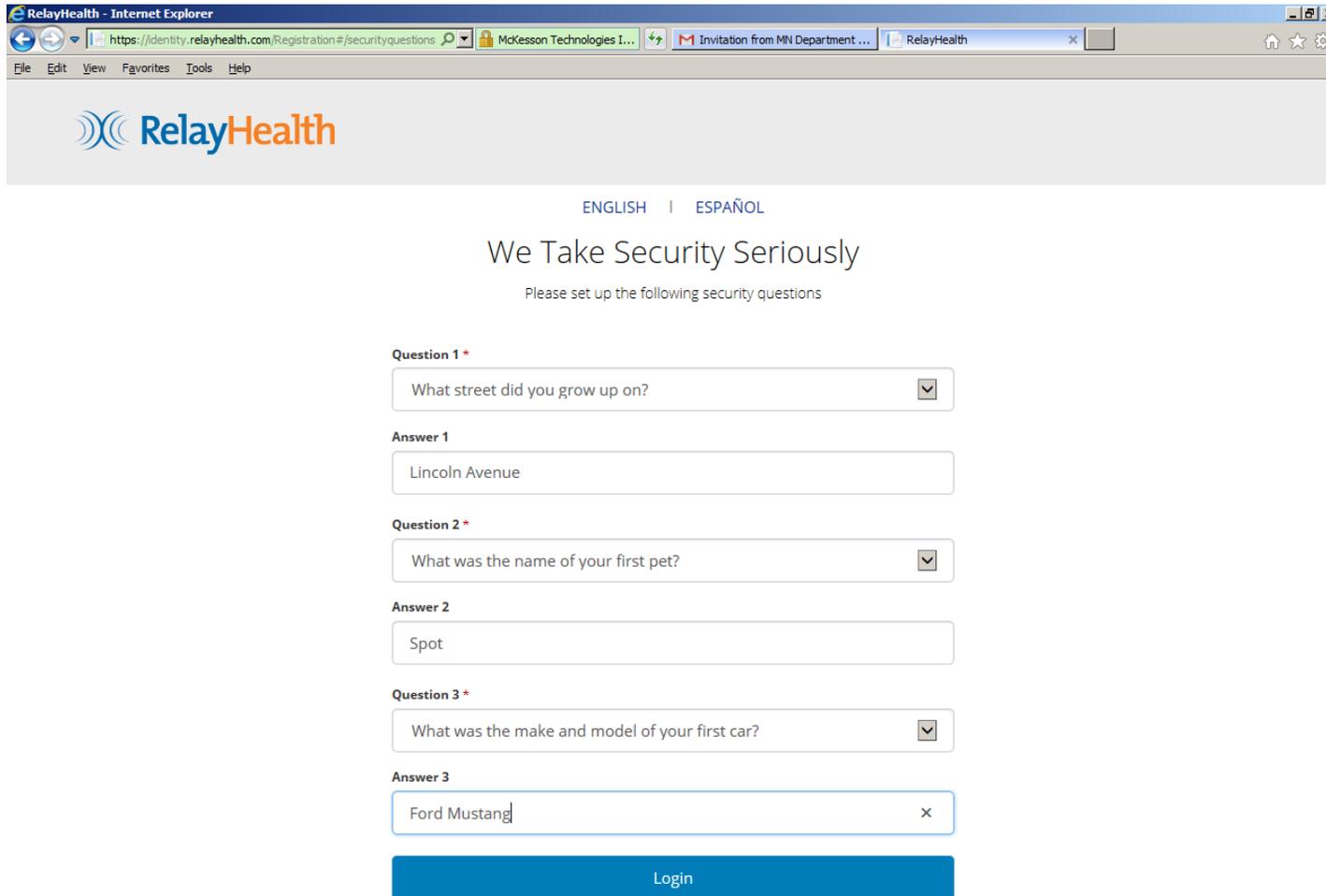
November 2017

Next step is to register the beneficiary (DEPENDENT in RelayHealth).   Click REGISTER MY DEPENDENT.
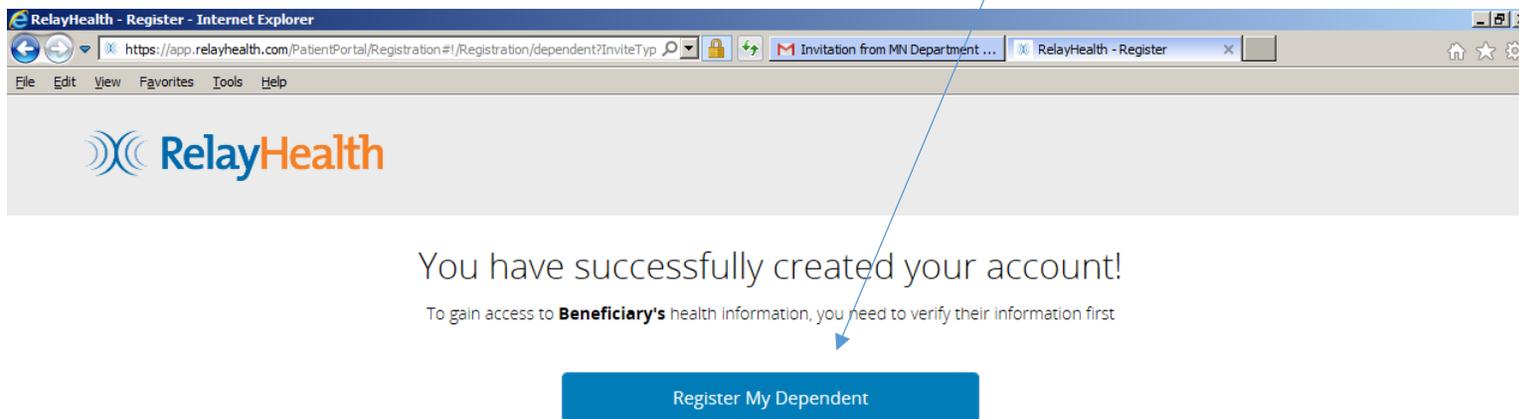
The Legal or Authorized Representative confirms that he/she is authorized by clicking YES, I CONFIRM.
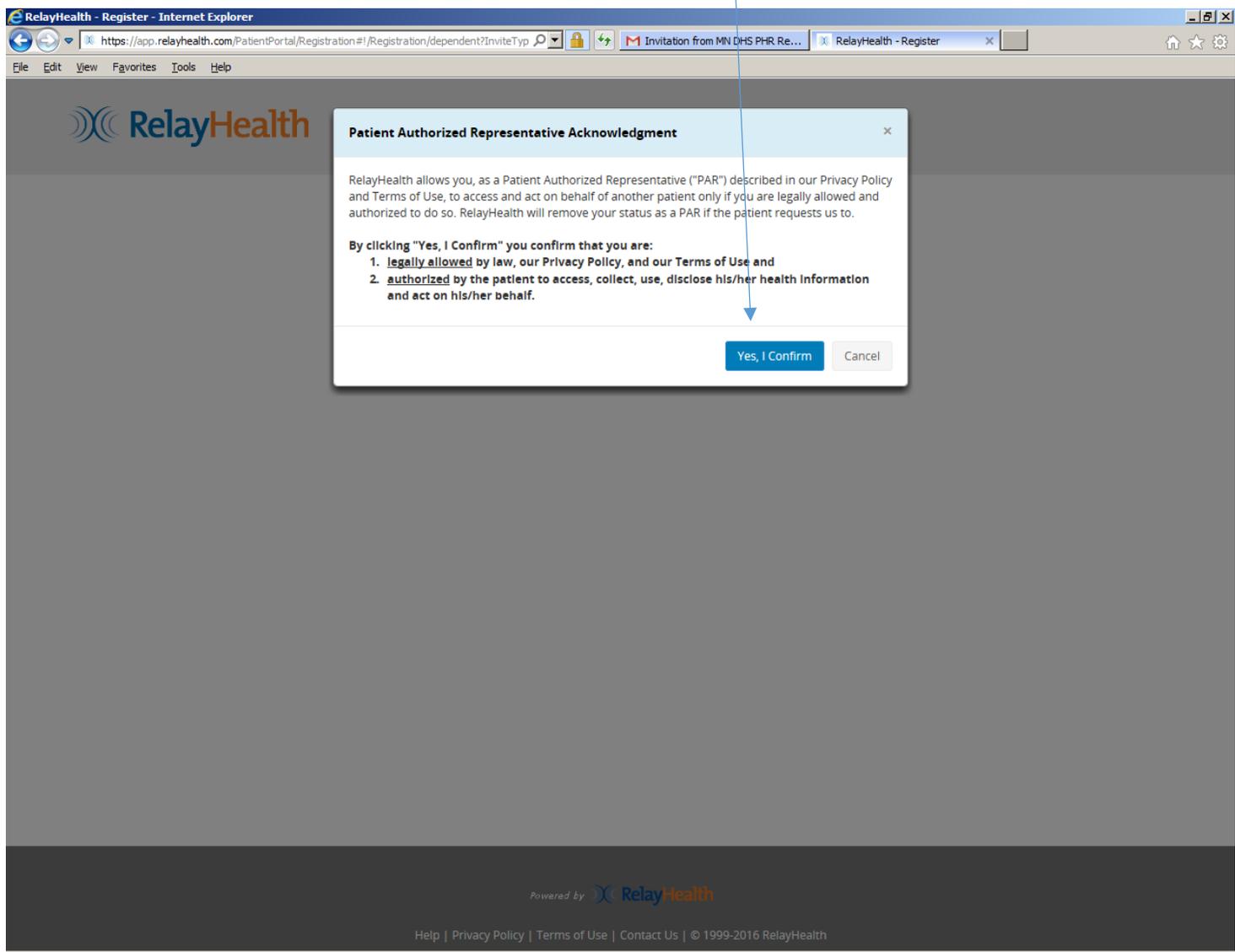
November 2017

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.

November 2017
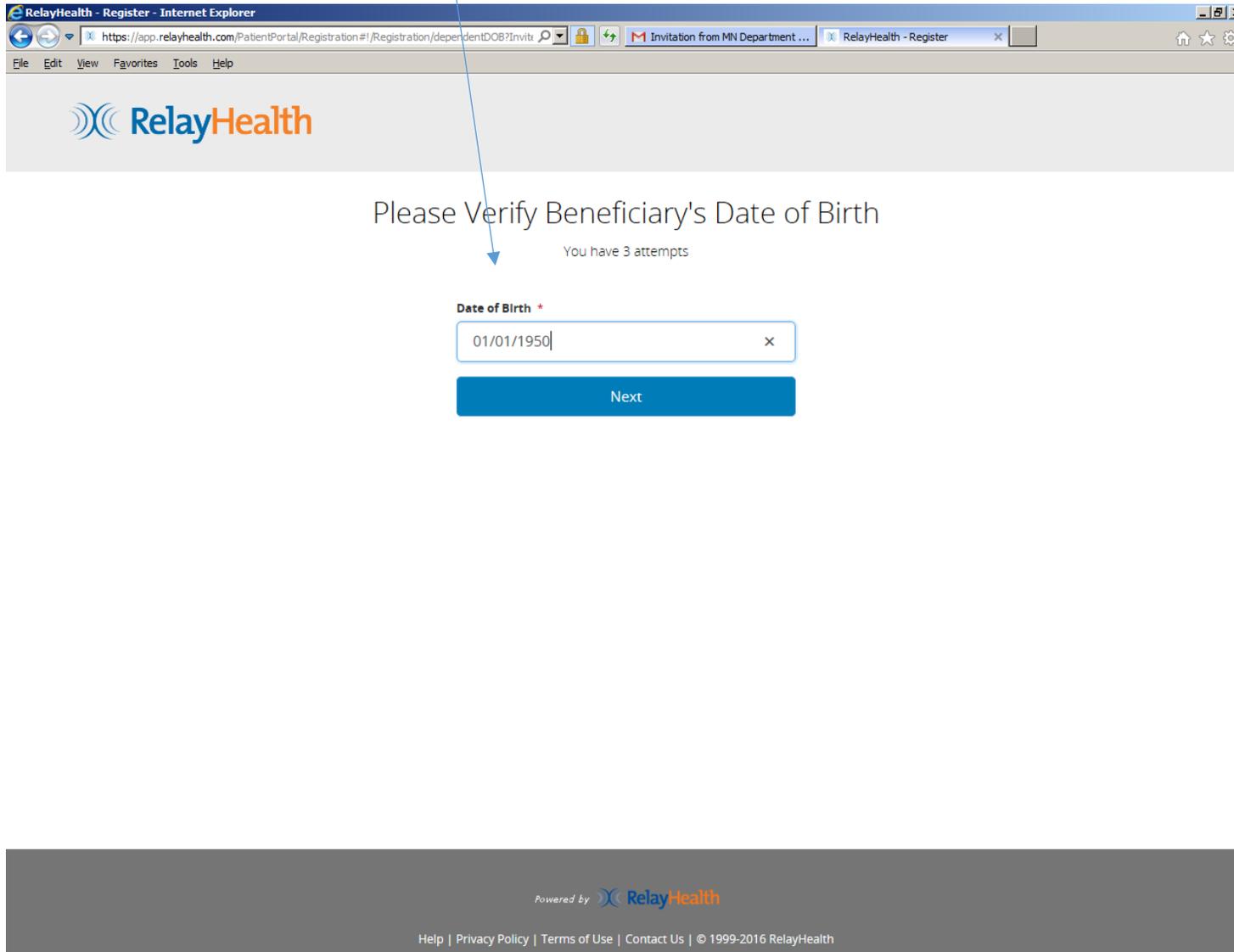
The Legal or Authorized Representative clicks "I have read and agree...", and clicks NEXT.

November 2017

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

November 2017

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".
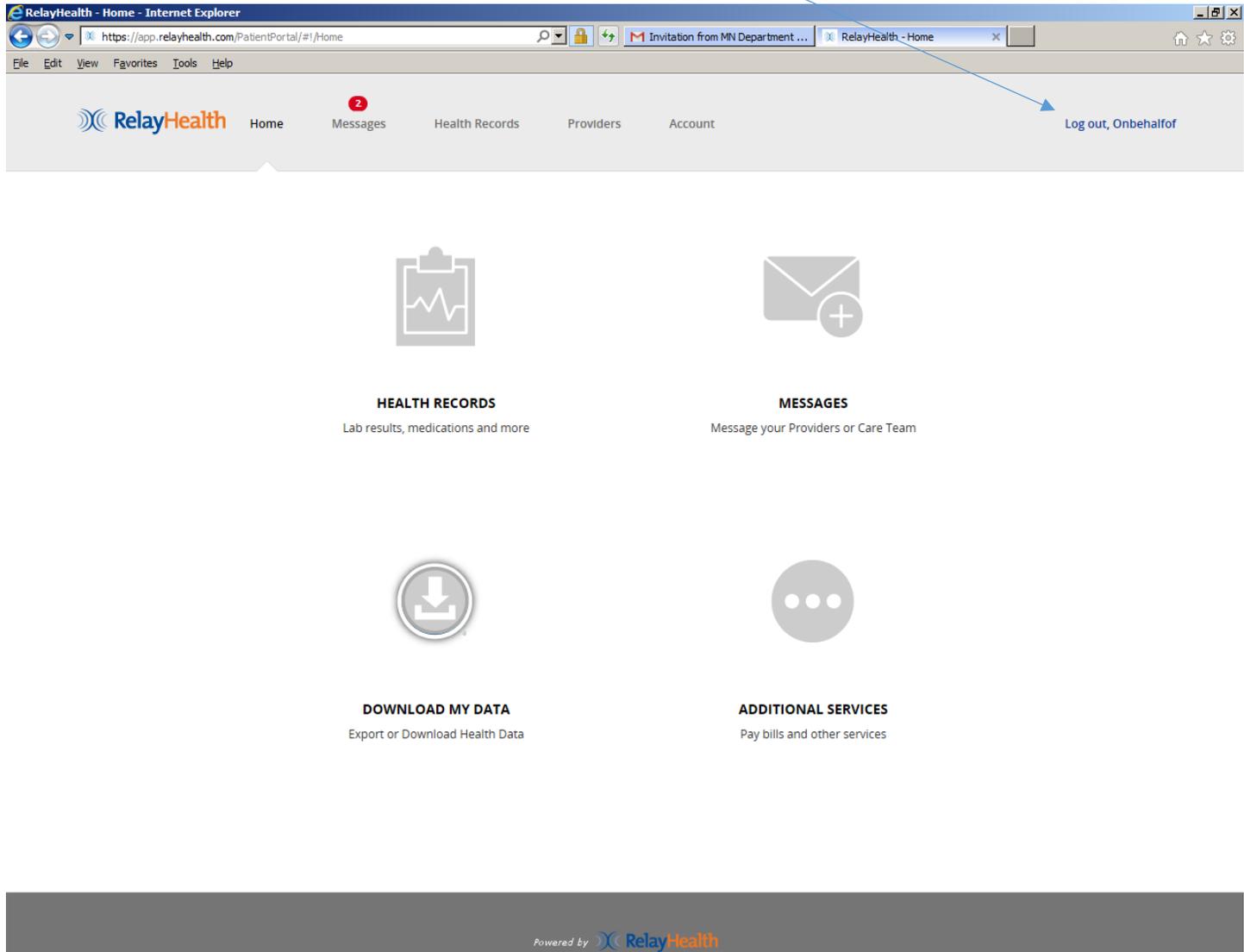
November 2017

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

November 2017
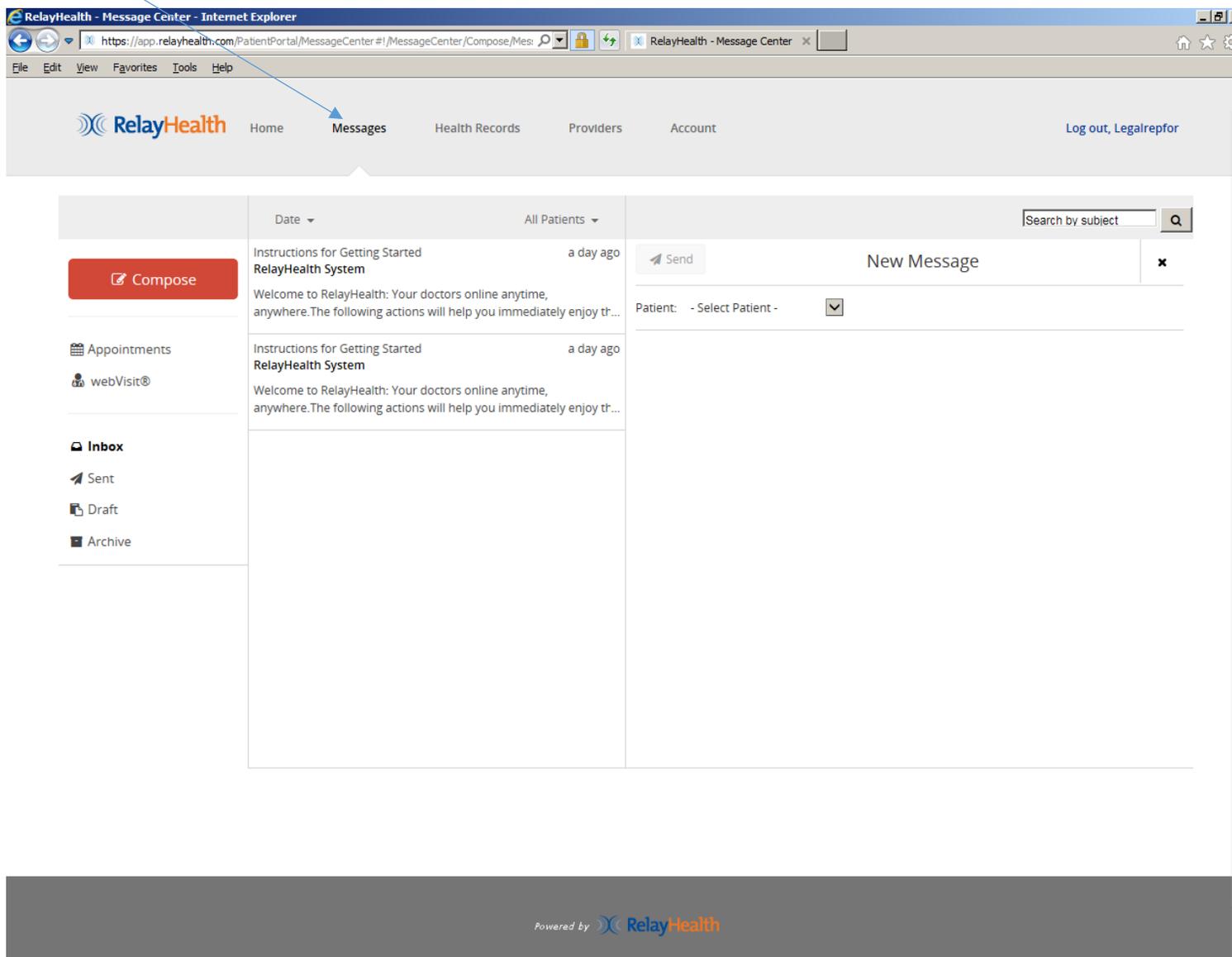
This is a sample of the email "welcome" message that the Legal or Authorized Representative receives when registration is complete.
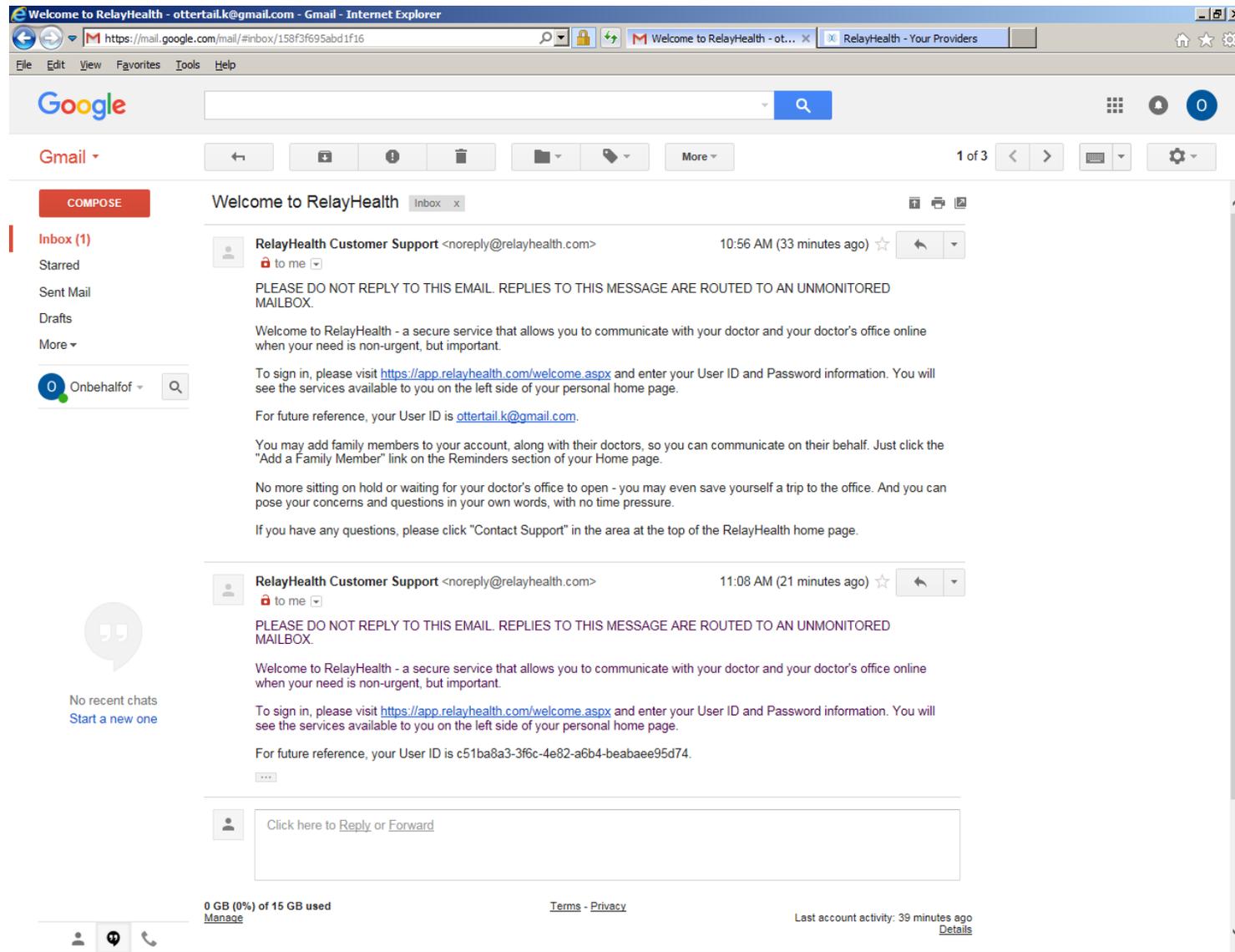
November 2017

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.
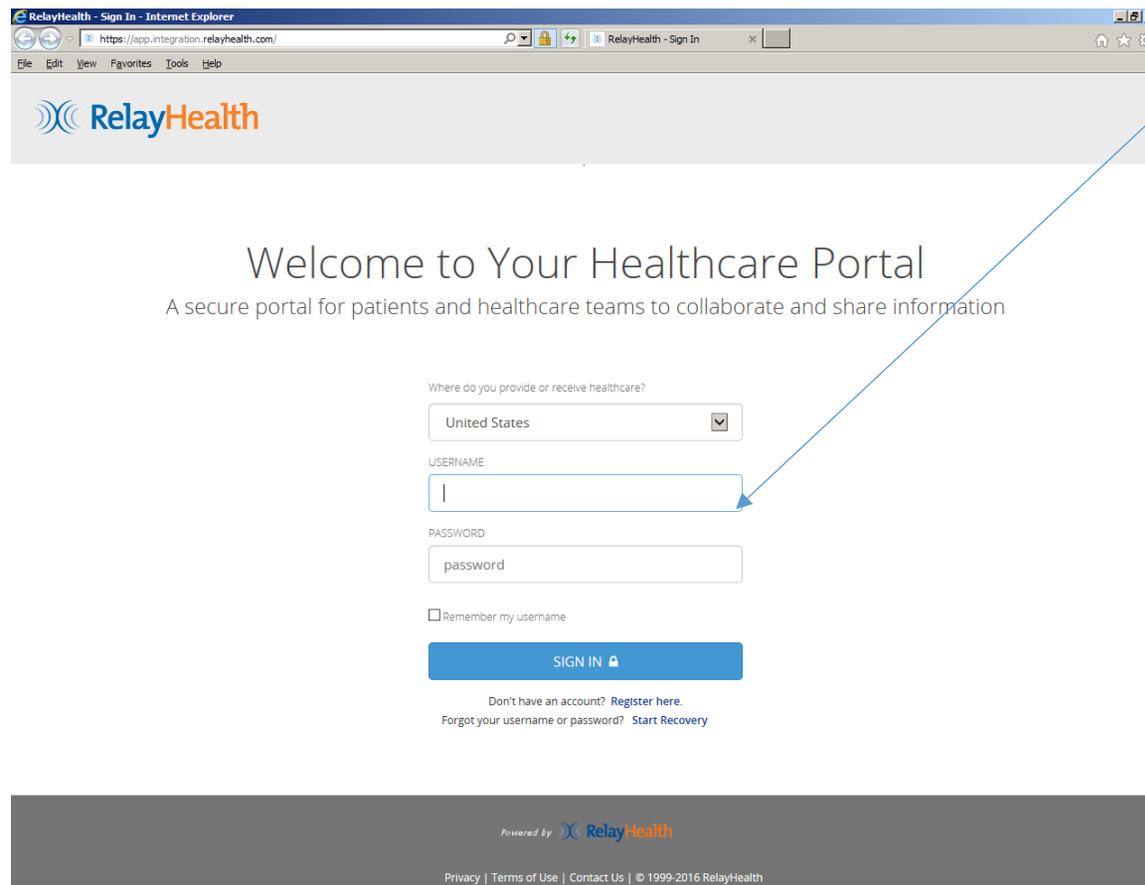
November 2017

This is the main screen for the RelayHealth Personal Health Record (PHR).
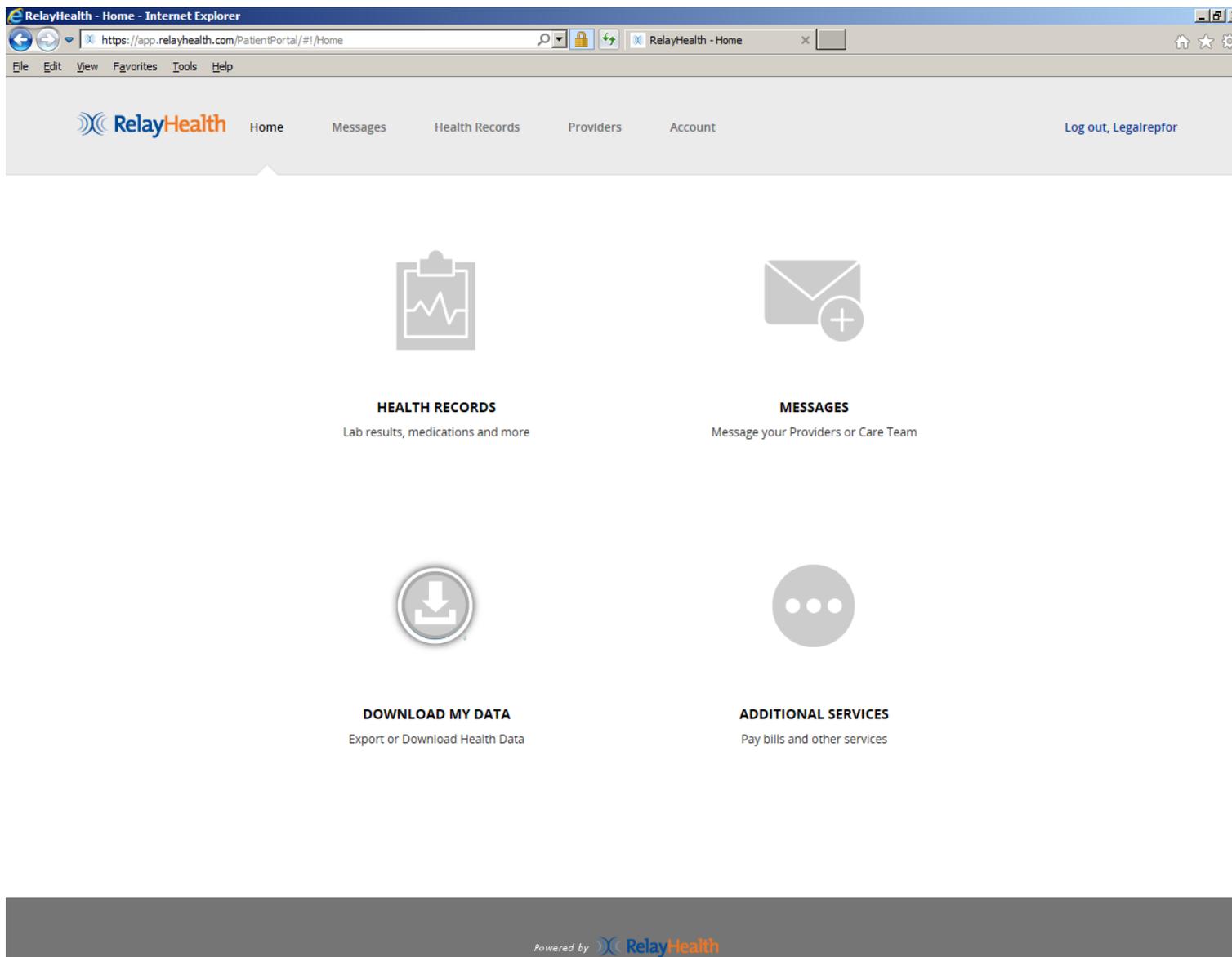
November 2017

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.
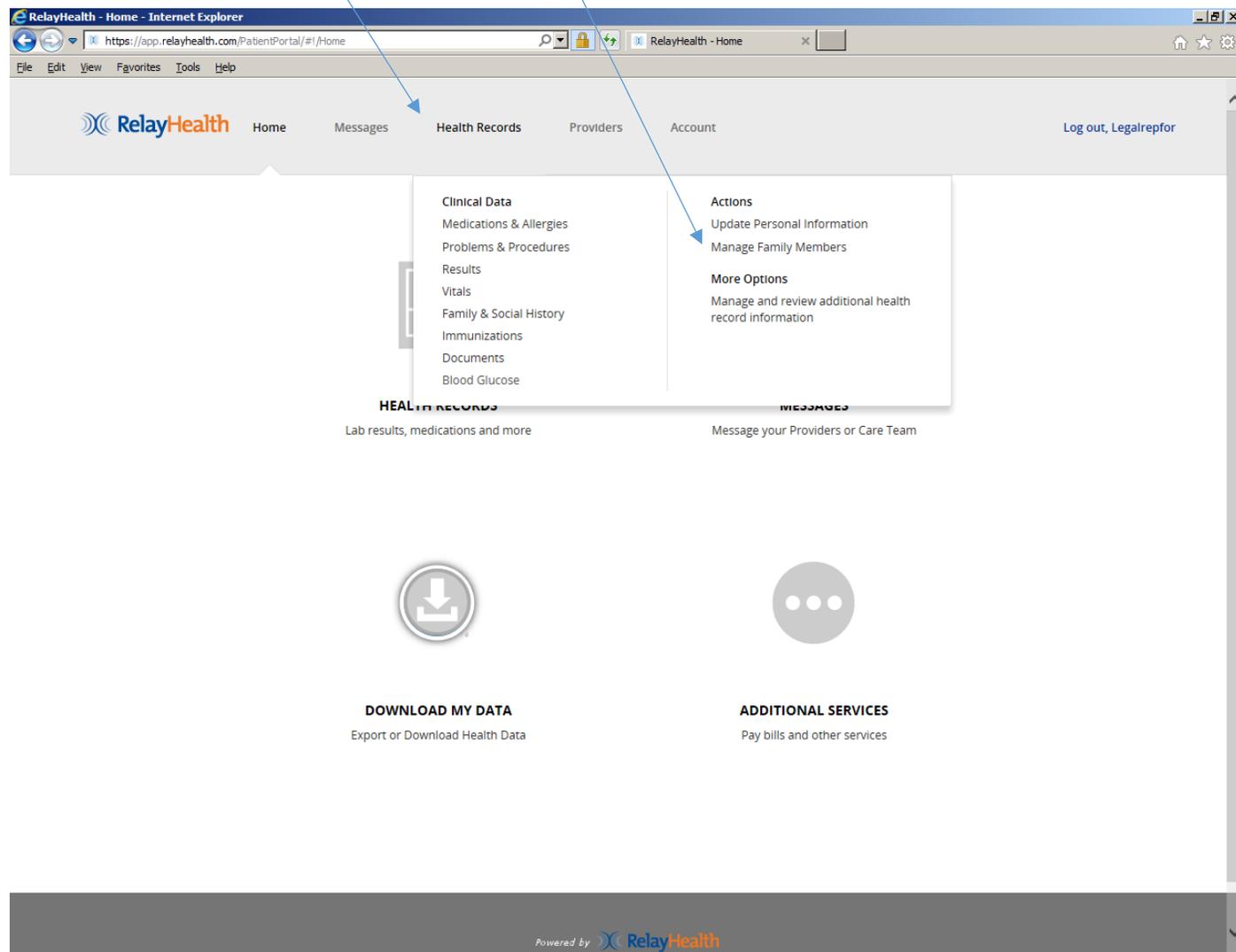
This shows the Legal or authorized representative as the ACCOUNT HOLDER with the Beneficiary as a DEPENDENT. Please note that "DEPENDENT" is the term used in the RelayHealth PHR to identify a Beneficiary of services; it does not automatically mean that the Beneficiary is a dependent in the legal or financial sense of the term.
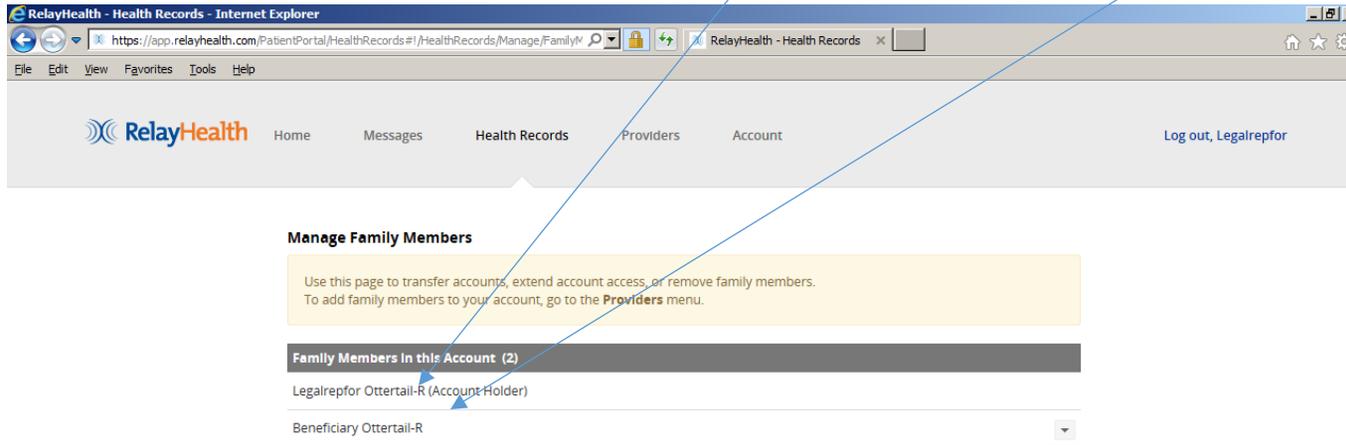
MESSAGES: These are similar in concept to email, however they exist completely within the PHR.

November 2017

Click on MESSAGES, then click on a message to display it in the viewing pane.
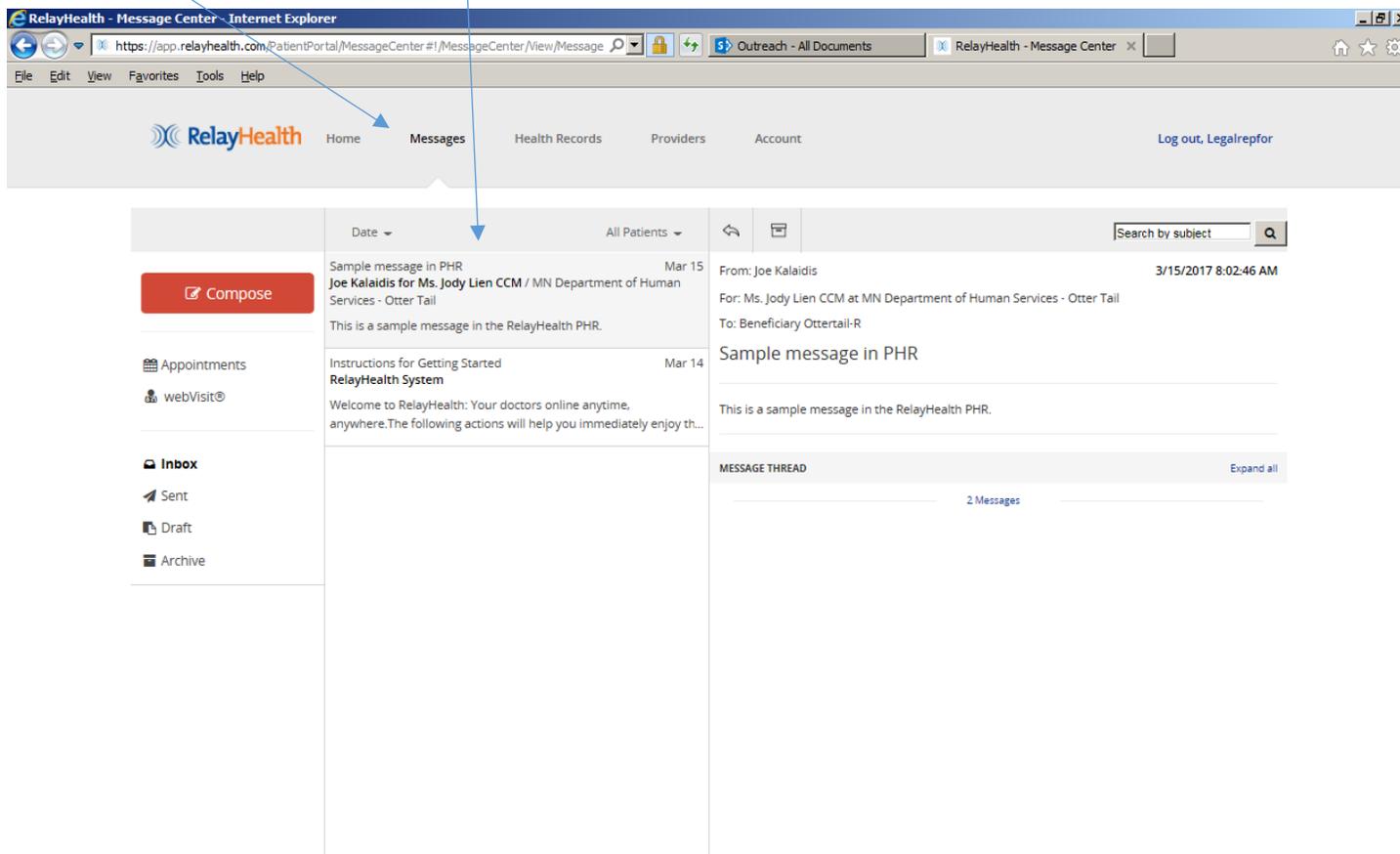
November 2017

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.
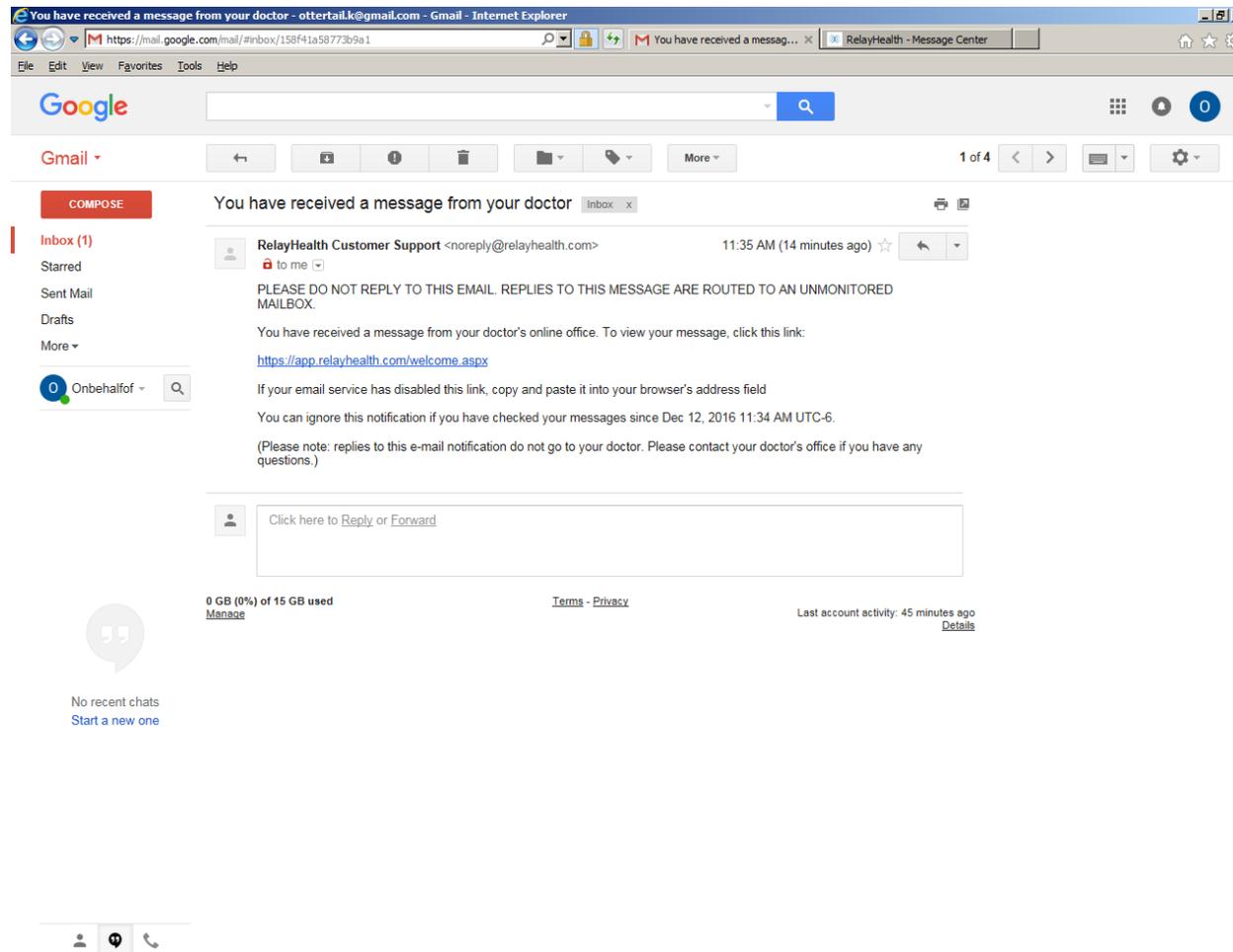
Click on the REPLY icon to reply to a message.

November 2017

Enter REPLY message text, then click SEND.

Confirmation that message was sent. Click CLOSE to return to messages.
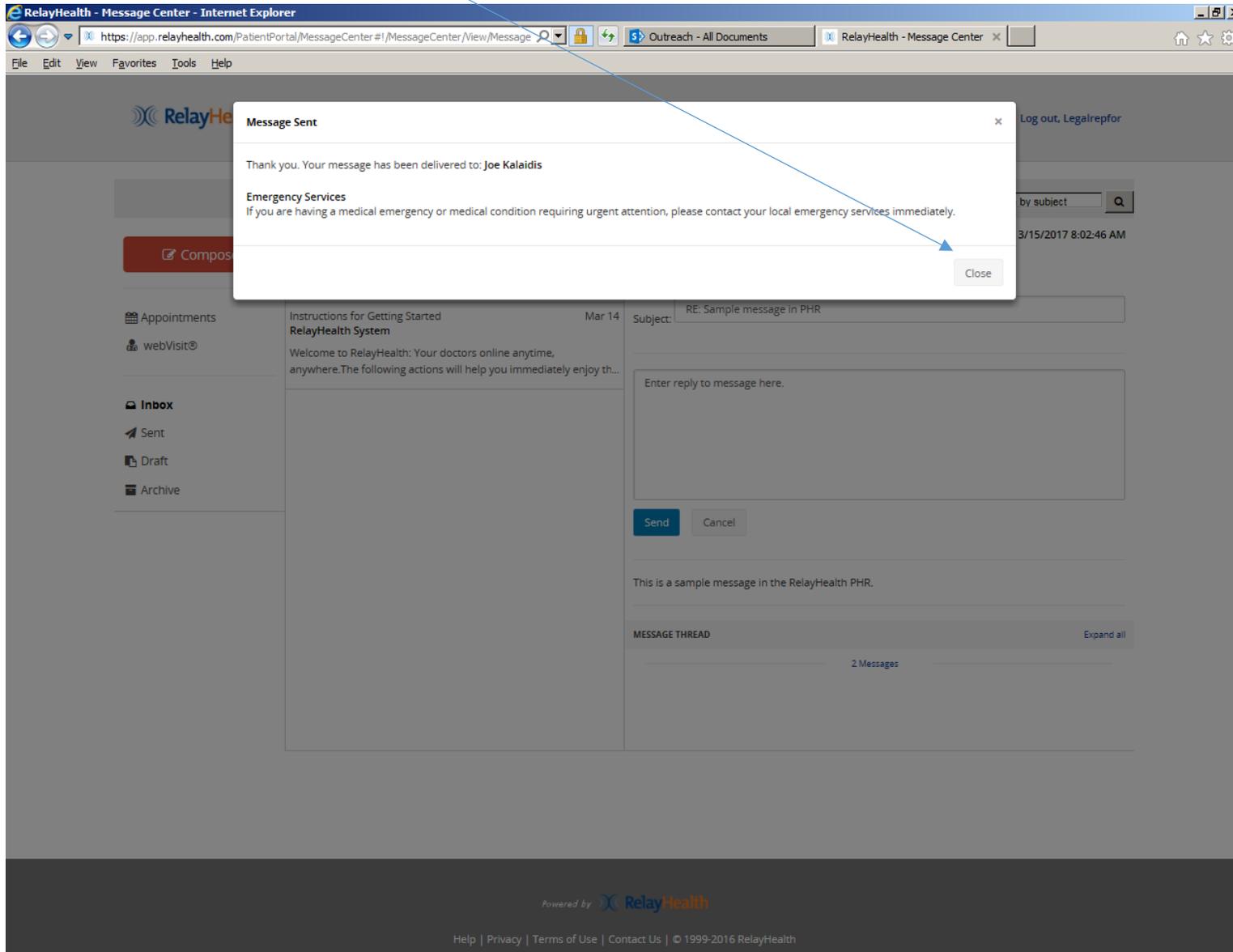
November 2017

Click SENT to show the message in SENT items.

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.
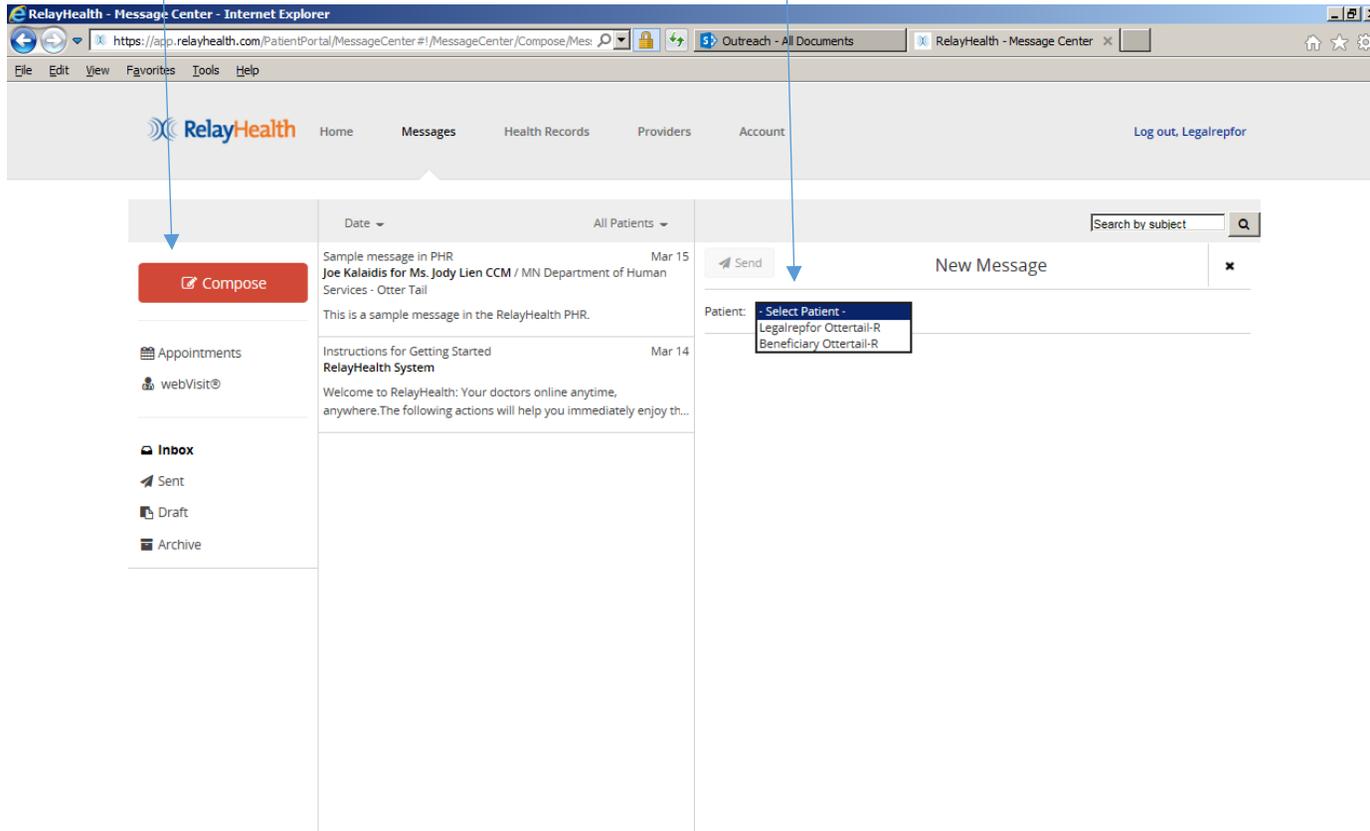
November 2017

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

November 2017

This screen displays when PROVIDER is selected. Click YES, I UNDERSTAND to proceed.
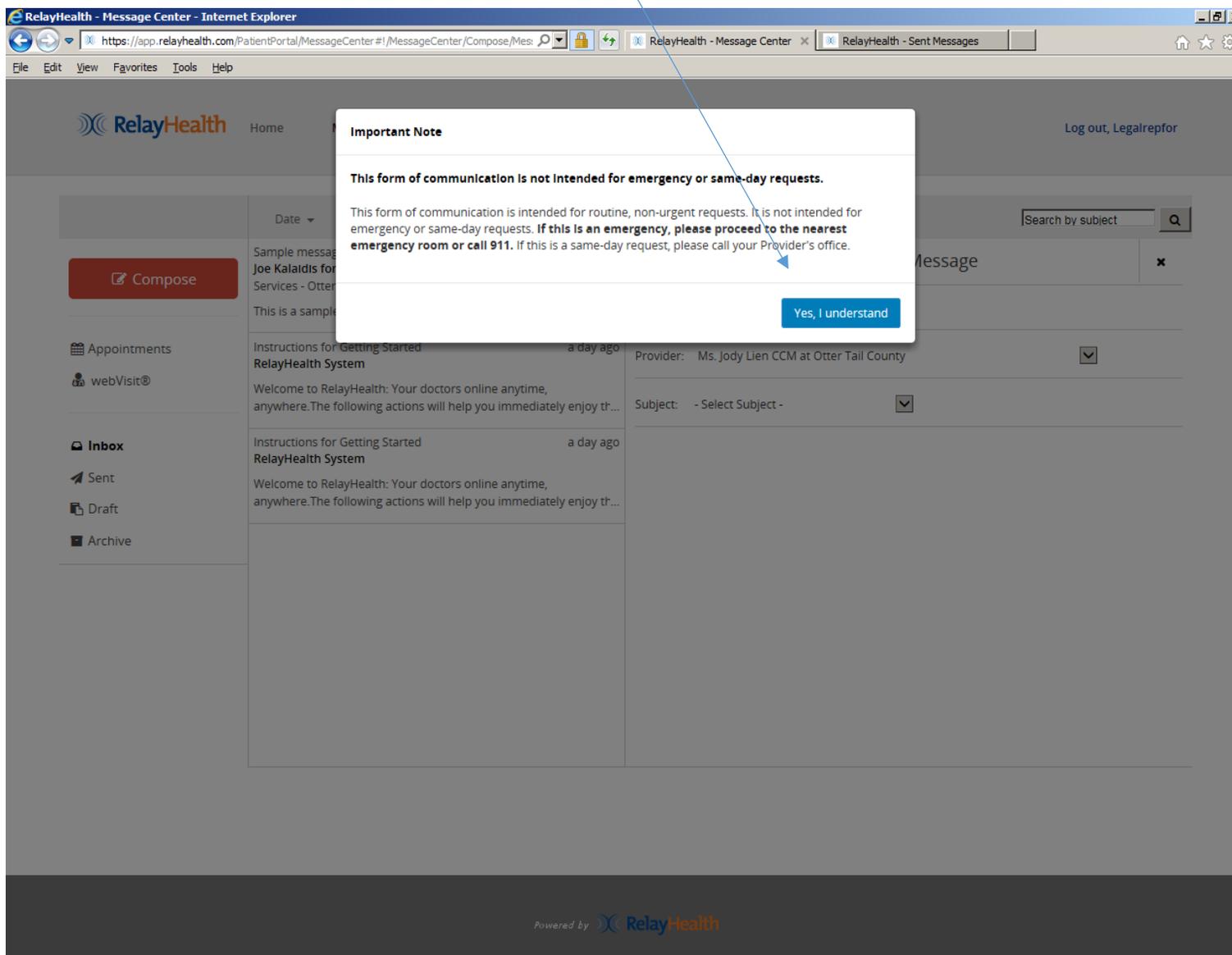
November 2017

Select SUBJECT from this dropdown list.

November 2017

Enter message text, then click SEND.

Confirmation that message was sent. Click CLOSE to continue.
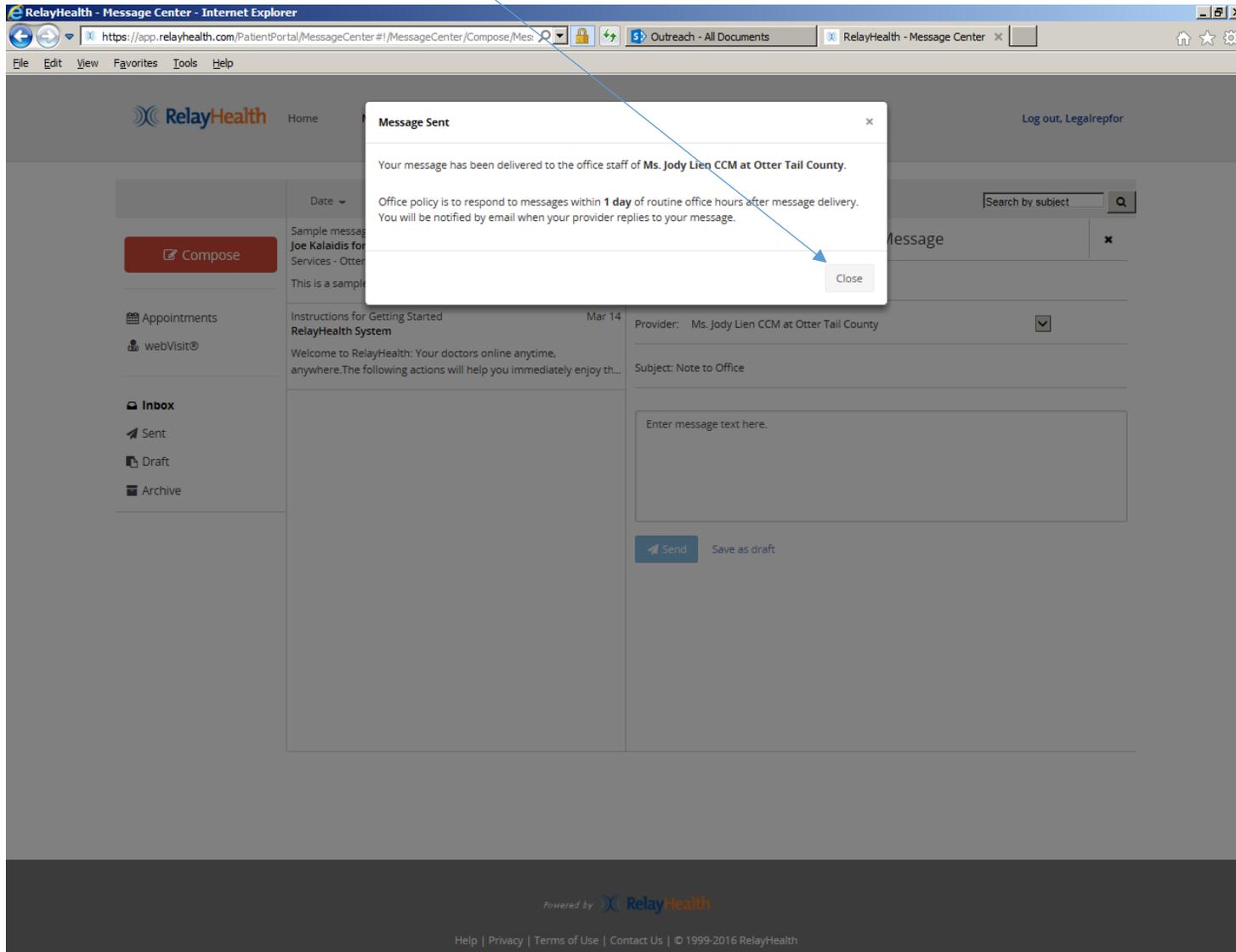
November 2017

This is how the message appears in SENT items.

November 2017

Click if desired to change how messages are sorted.

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

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 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.
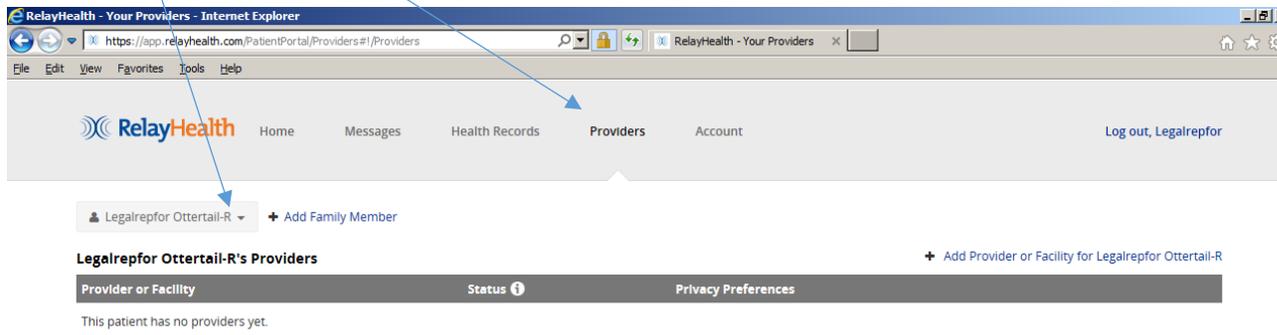
November 2017

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

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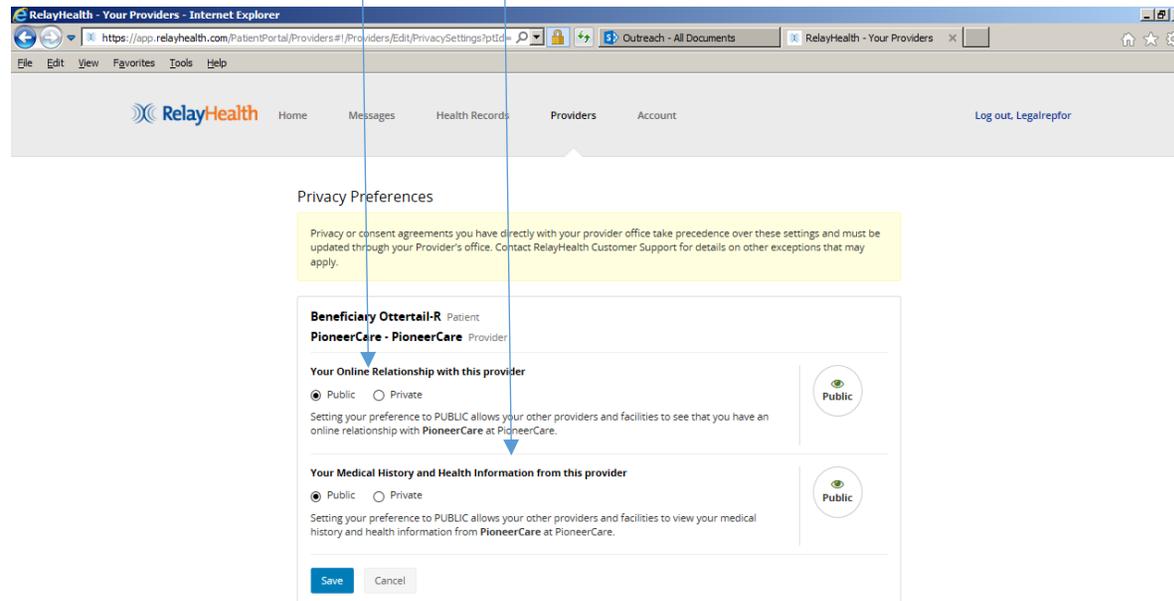
To add a relationship with another Fergus Falls provider organization that is participating in this demonstration project, click on ADD PROVIDER OR FACILITY to get the next screen. In addition to Otter Tail County, participants include:

- Fergus Falls Community Behavioral Health Hospital
- Lake Region Healthcare
- Lakeland Mental Health Center
- LB Homes
- PioneerCare
- Productive Alternatives
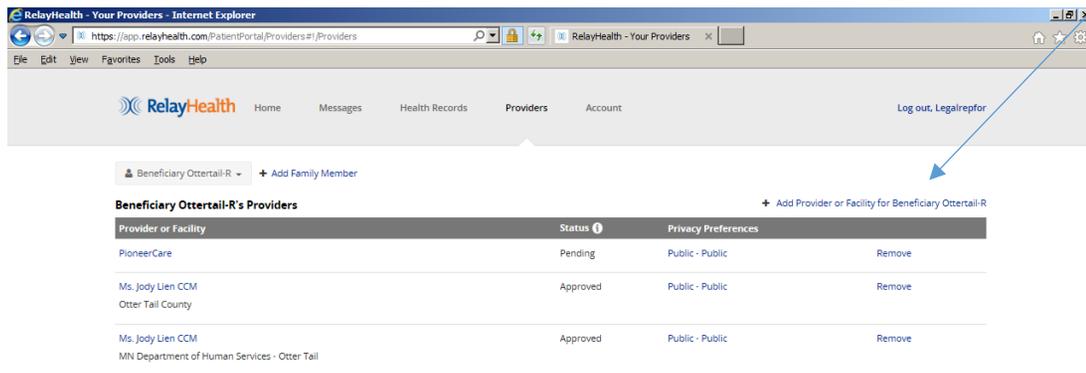
Enter all or part of the provider organization name, then click SEARCH. In this example, the search is for Lake Region Healthcare. Zip code is optional.

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.

November 2017

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.

November 2017

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.

November 2017

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.
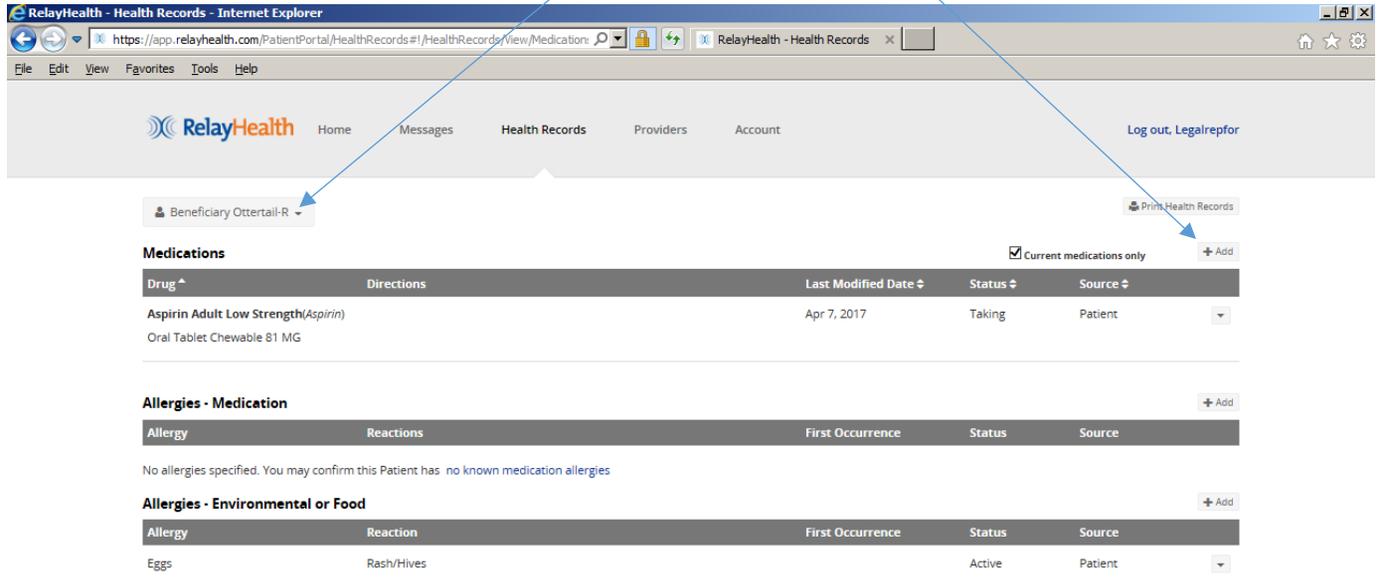
November 2017

Click DOCUMENTS to get the next screen.
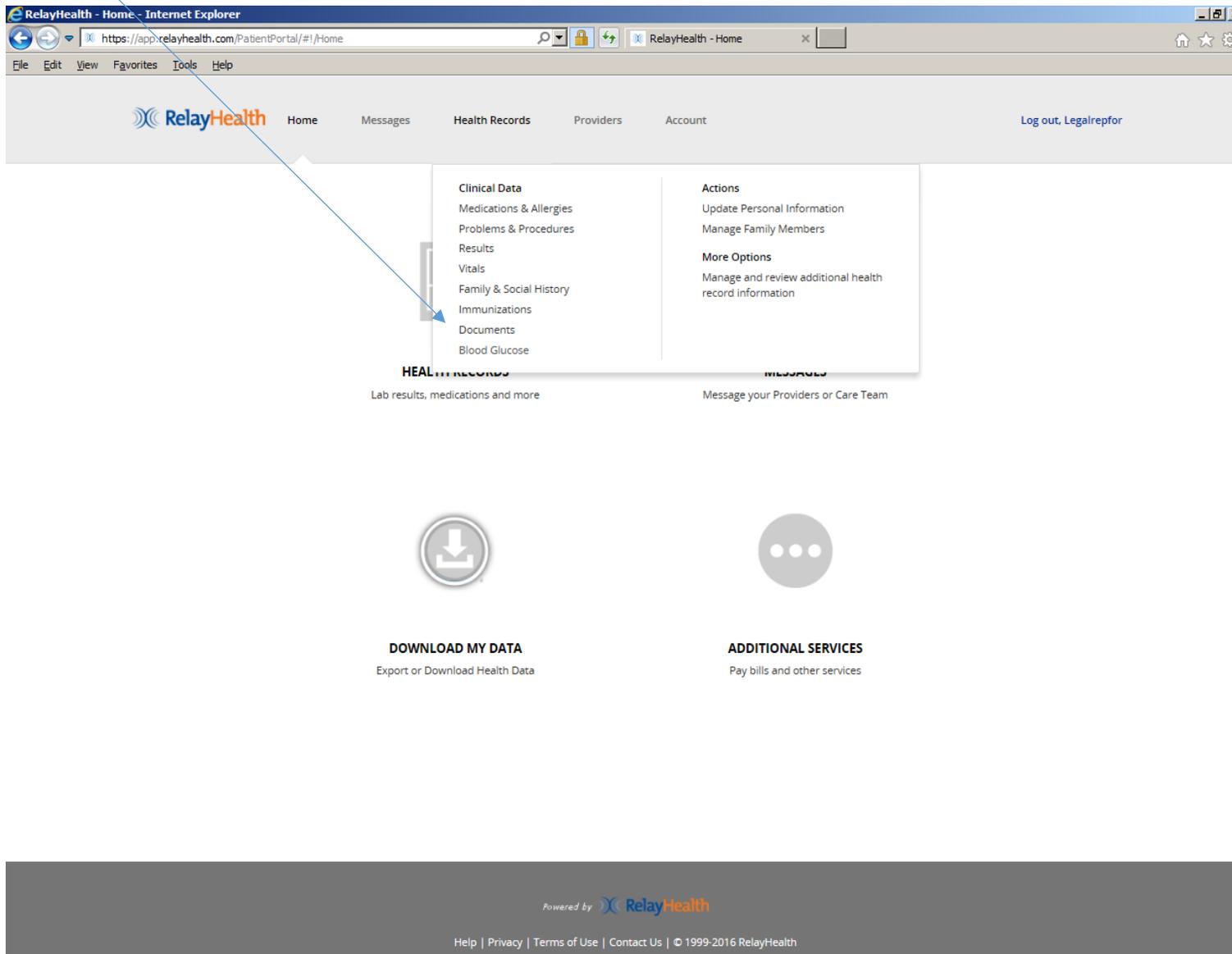
November 2017

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.
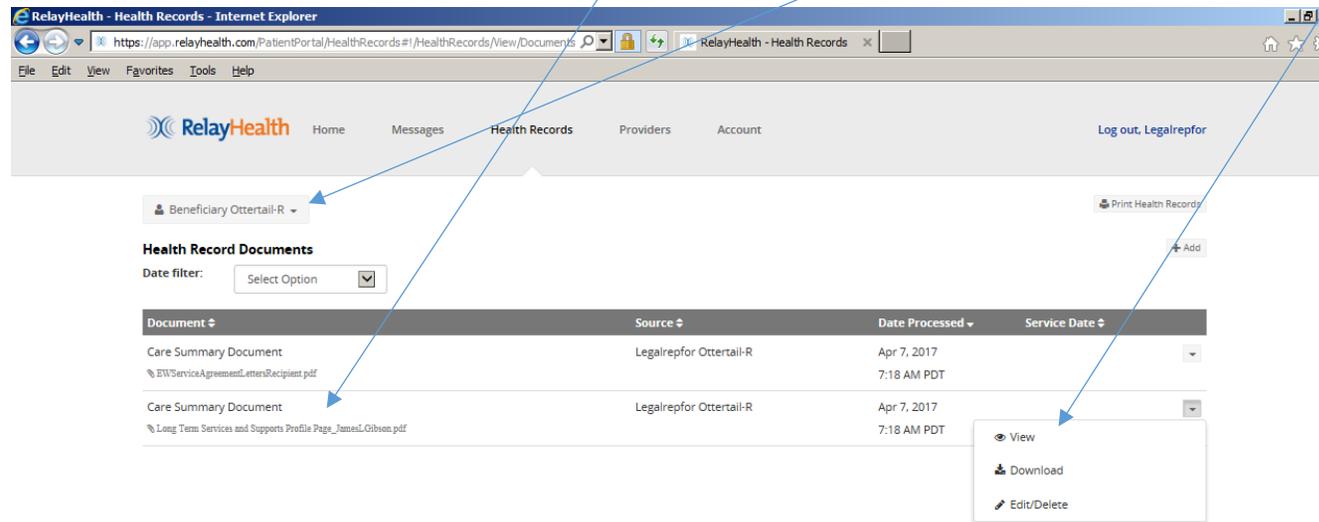
November 2017

This is a sample of the new DHS Profile page.

```
SAMPLE_PDF_Profile_Page.pdf - Adobe Acrobat Reader DC                                    _ |&| X|
File  Edit  View  Window  Help
Home    Tools        SAMPLE_PDF_Profil... ×                                     (?)  Sign In

         1 / 2        70.9%  ▼
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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.

Beneficiary Information

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

LTSS Program

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

Case Manager

Name: Mary Jones
Employer: Otter Tail County
Phone Number: 555-555-1212

Financial Worker

Name: John Smith
Employer: Otter Tail County
Phone Number: 555-555-1215

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.

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.

November 2017

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

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.
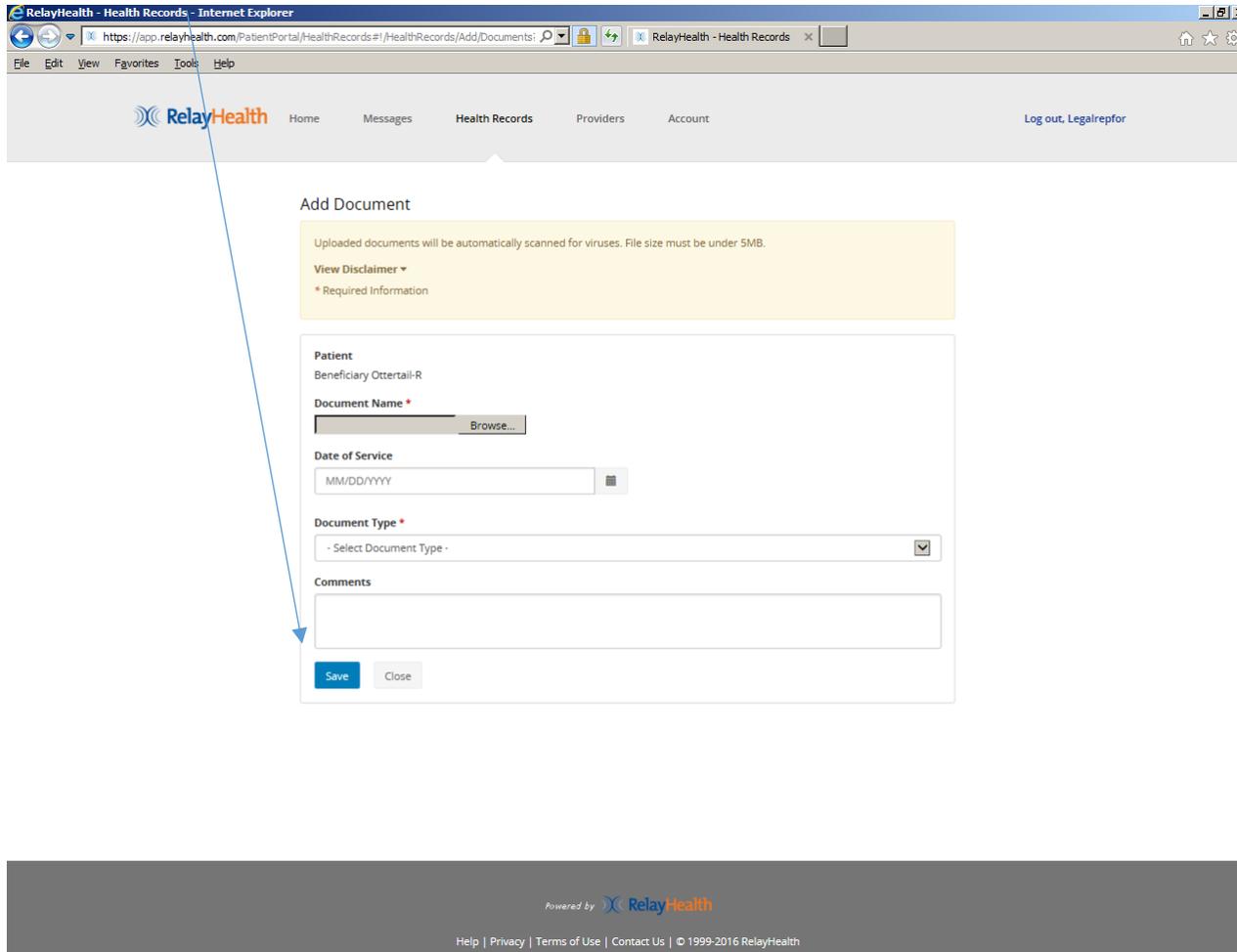
November 2017

Click PRINT HEALTH RECORDS to view the entire record.

November 2017

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.

November 2017

To update personal information (including Living Will and Advanced Directive), click on HEALTH RECORDS, then click UPDATE PERSONAL INFORMATION.
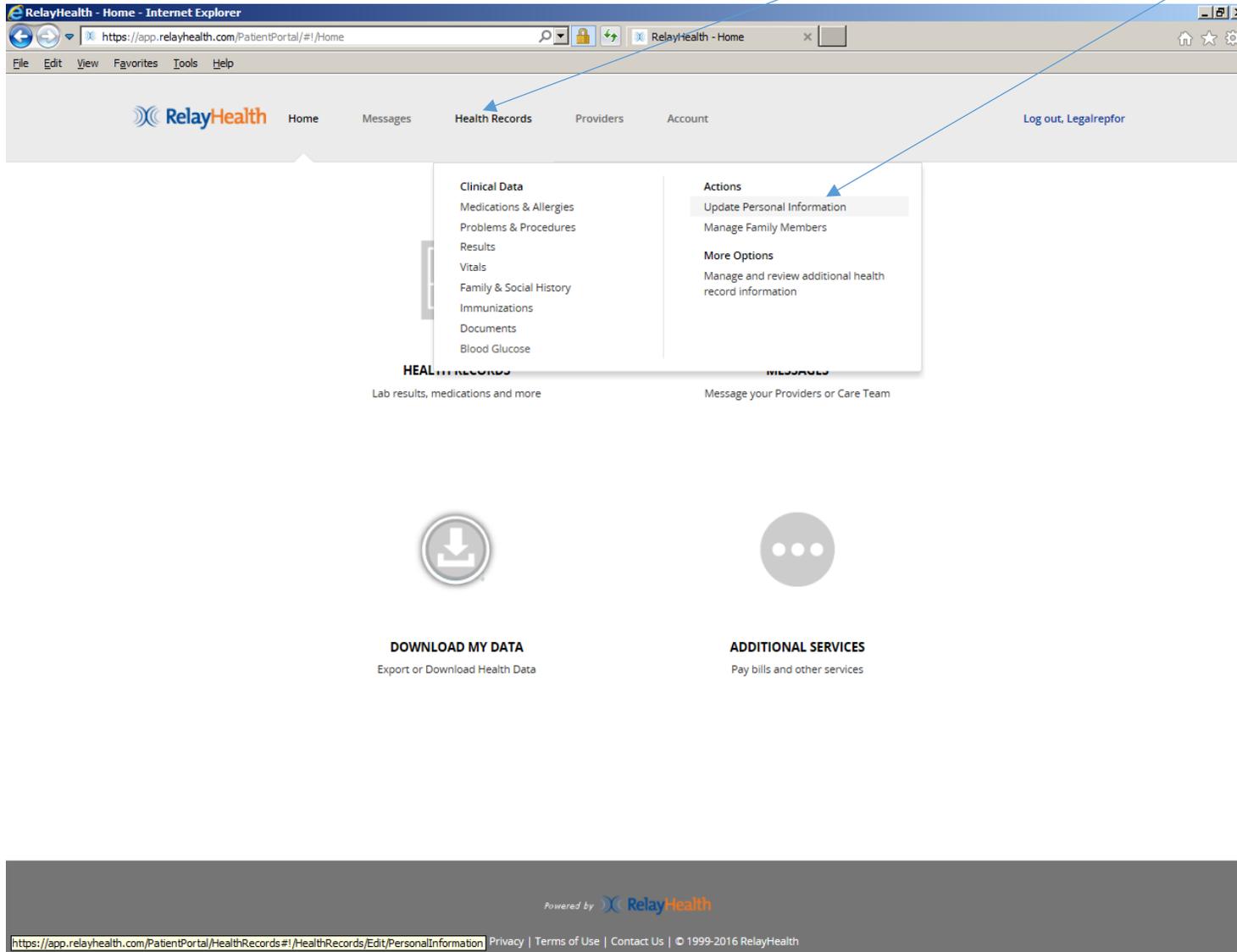
Click on the desired section to add or edit information. For example, click on HEALTH CONSIDERATIONS to update Living Will and/or Advance Directive.

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.

November 2017

Update HEALTH CONSIDERATIONS below by clicking on the buttons.

November 2017

Click ACCOUNT to get the next screen.
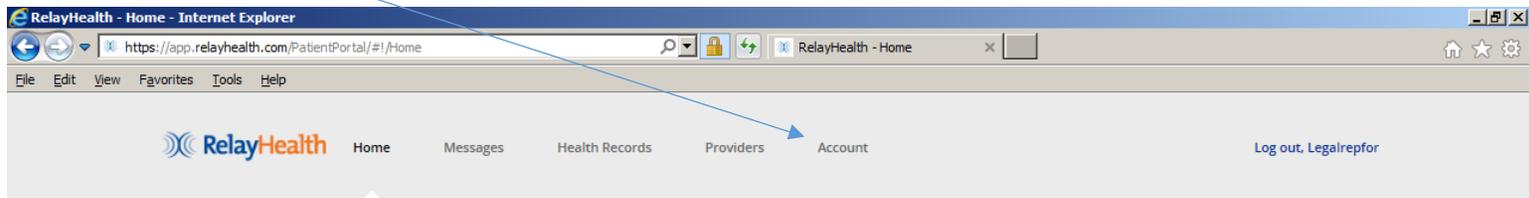
November 2017

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.

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.