

Access Level Settings

If you migrated from WebView to Updox, the migration process transfers over your previous WebView access level settings to the following two equivalent Updox access level settings.

The following table describes the Updox-related access level settings on the Access Level Configuration screen - **General** tab. These settings are available only when the migration has completed and the system has selected the **Updox Installed** check box on the [Special Features screen - General tab](#). If you are installing Updox for the first time, do not manually select the **Updox Installed** check box on the Special Features screen - **General** tab. Instead, wait for the migration to finish and the system will select the check box automatically.

Setting	Description
Updox	<p>Set Admin to Access to allow the user to have Portal Administrator access to Updox.</p> <p>Set View Practice Messages to Access to allow operators to receive portal messages that patients send to the practice inbox.</p> <p>Set Account Management to Access to allow operators to create and manage Updox accounts via the Create Account and Manage Account buttons on the Patient screen - Configuration tab.</p>
Data Gateway	<p>Set API Tokens to View to allow an operator to view the API tokens on the Special Features screen - General tab.</p> <p>Set API URL to View to allow an operator to view the API URL on the Special Features screen - General tab.</p> <p>For the Administrator access group, these settings are set to View automatically.</p>

Updoox - Access Level Settings

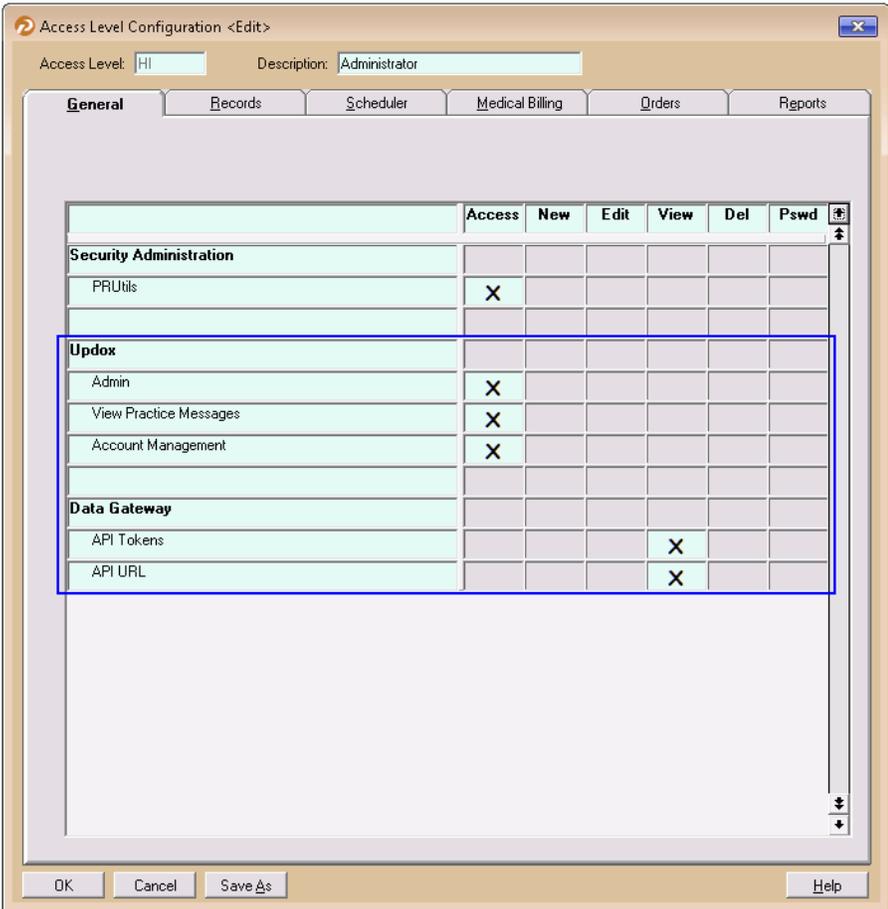


Figure 95. Access Level Configuration Edit screen - General tab

To allow an operator access to the Portal Audit Trail report (for WebView, this was called the WebView Audit Trail report), enable the **Portal Audit Trail Report** access setting on the Access Level Configuration screen - **Reports** tab - **General** sub-tab.

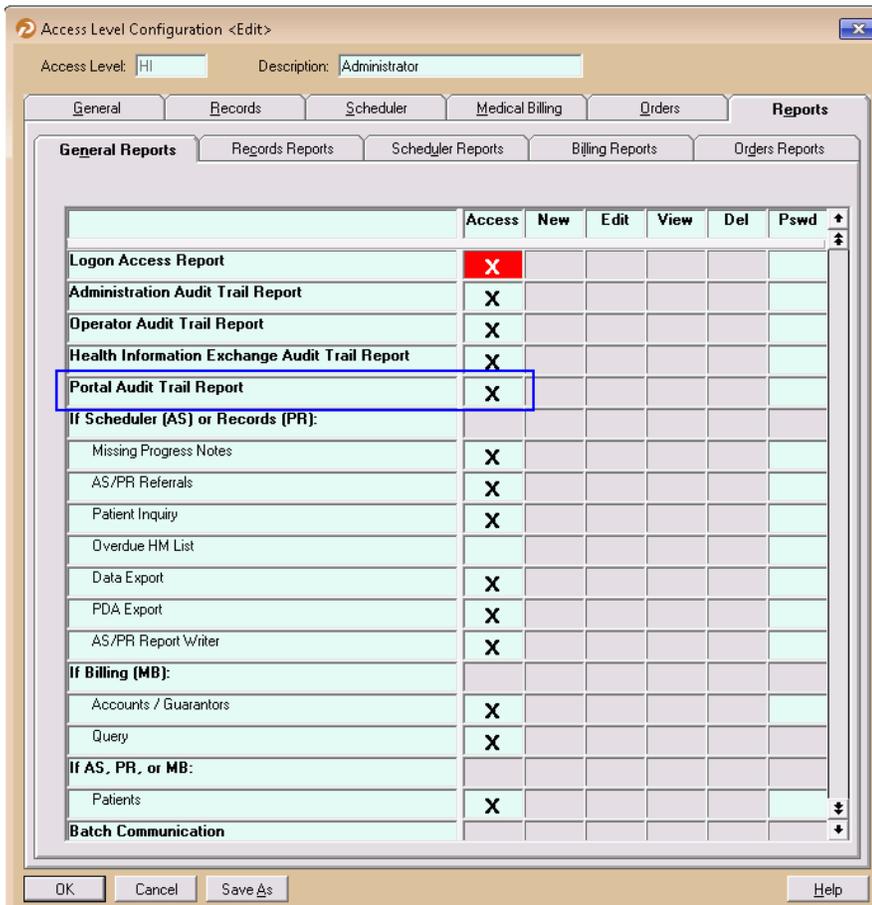


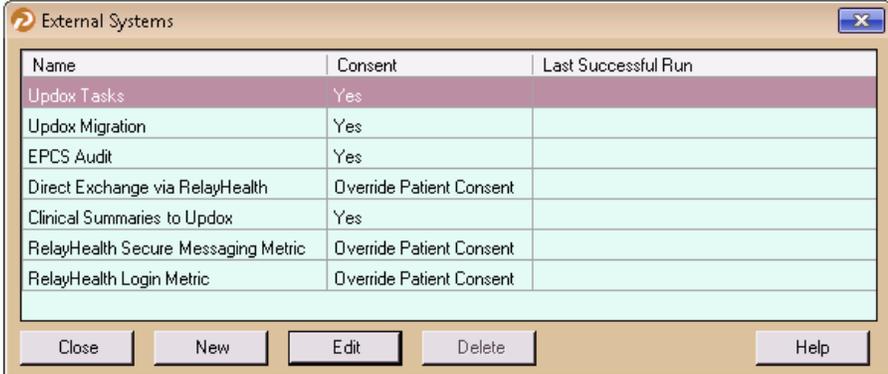
Figure 96. Access Level Configuration screen - Reports tab - General sub-tab

Updox tasks

Complete the following steps to set up a schedule to determine how often patient messages and appointments are sent to or received from Updox.

NOTE: The **Updox Tasks** row appears on the External Systems screen only after a successful Updox migration has occurred.

1. Select Maintenance > Setup > **External Systems**. The External Systems screen appears.



Name	Consent	Last Successful Run
Updox Tasks	Yes	
Updox Migration	Yes	
EPCS Audit	Yes	
Direct Exchange via RelayHealth	Override Patient Consent	
Clinical Summaries to Updox	Yes	
RelayHealth Secure Messaging Metric	Override Patient Consent	
RelayHealth Login Metric	Override Patient Consent	

Close New Edit Delete Help

Figure 98. External Systems screen

2. Double-click **Updox Tasks**. The Updox Tasks screen appears.

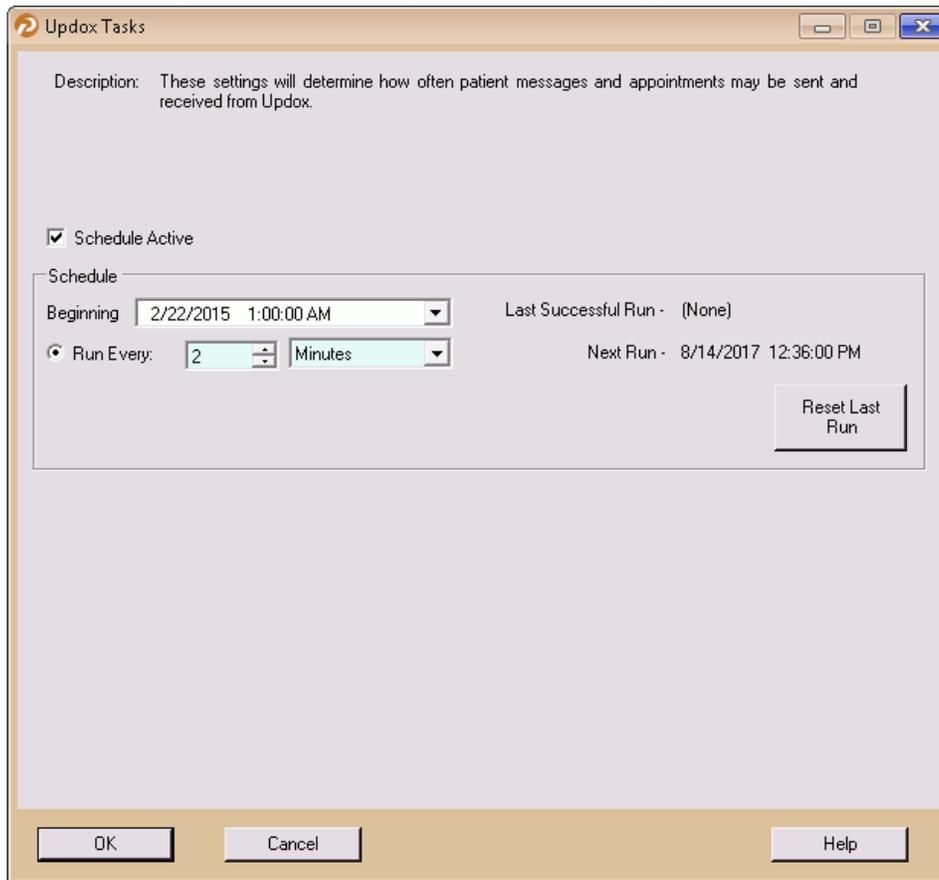


Figure 99. Updox Tasks screen

3. Complete the fields on this screen to set up the schedule for sending and receiving patient messages and appointments to Updox. The following table describes the fields and buttons on this screen.

Fields/Buttons	Description
Schedule Active	Select this check box to set up an active schedule to send and receive patient messages and appointments to Updox. Selecting this check box enables the Schedule section of the screen.
Beginning	Enter the beginning run date and time, or click the down arrow button and select a date from the calendar. When the Schedule Active check box is selected, the Beginning field defaults to the last run date/time. If the last run date doesn't exist (for example, the migration failed), then the Beginning field defaults to blank.

Fields/Buttons	Description
Run Every	<p>Enter the interval that the Updox patient message/appointment update will run.</p> <p>This field will default to the recommended time interval of 2 minutes; however, you can change the value if desired.</p>
Last Successful Run	<p>This field reflects the date and time of the last successful Updox patient message/appointment update.</p> <p>This field defaults to the migration completion date/time.</p>
Next Run	<p>This field reflects the date and time of the next Updox patient message/appointment update.</p>
Reset Last Run	<p>Click this button to re-upload historical records. A warning message appears. This button should only be used when uploads have failed or have been incomplete. Re-uploading records may take several hours or days.</p>
OK	<p>Click this button to save changes and run the Updox patient message/appointment update as scheduled.</p>
Cancel	<p>Click this button to close the screen without saving changes.</p>
Help	<p>Click this button to access the online help system.</p>

4. Click the **OK** button. The Updox patient message/appointment update will run as scheduled.

Clinical summaries

Each time notes or lab results are signed, structured health information is transmitted to Updox in the form of a clinical summary (CDA). Complete the following steps to set up the timing of transmitting clinical summaries to Updox.

NOTE: The **Clinical Summaries to Updox** row appears on the External Systems screen only after a successful Updox migration has occurred.

To set up clinical summaries for Updox:

1. Select Maintenance > Setup > **External Systems**. The External Systems screen appears.

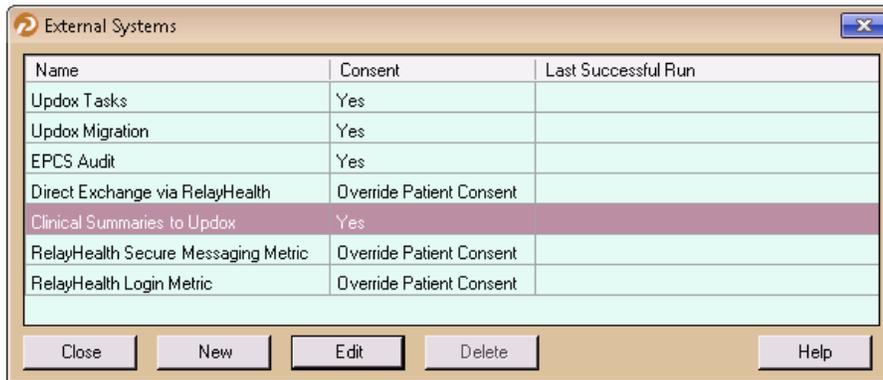


Figure 100. External Systems screen

2. Double-click **Clinical Summaries to Updox**. The Clinical Summaries to Updox screen appears.

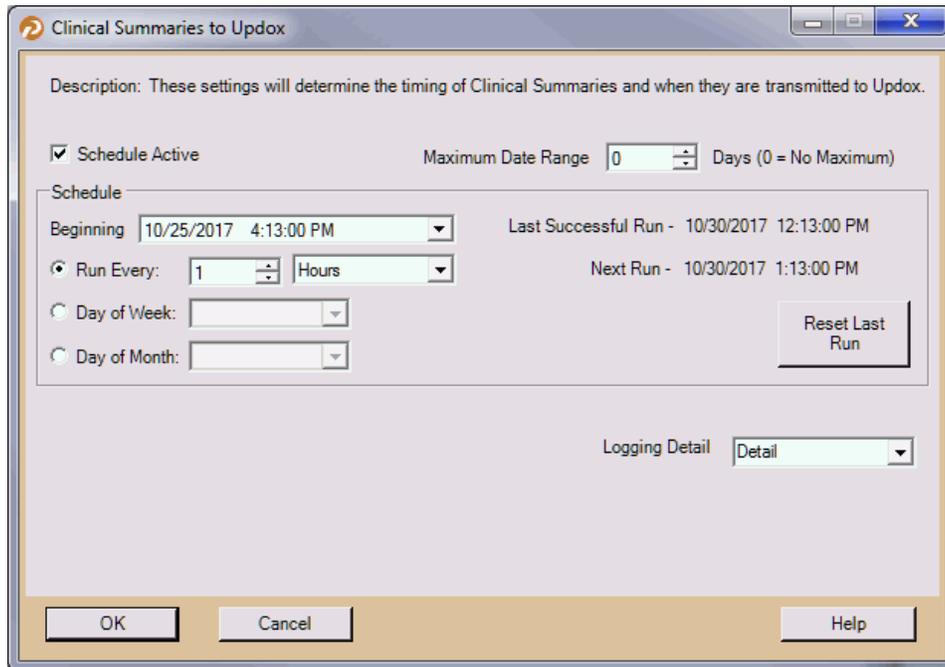


Figure 101. Clinical Summaries to Updox screen

3. Complete the fields on this screen to set up the timing and content of clinical summaries transmitted to Updox. The following table describes the fields and buttons on this screen.

Field/Button	Description
Schedule Active	Select this check box to set up an active schedule to send clinical summaries to Updox.
Maximum Date Range	Indicate the maximum date range in number of days. To indicate no maximum, enter 0 .
Beginning	<p>Enter the beginning run date and time, or click the down arrow button and select a date from the calendar.</p> <p>As a general rule, during initial configuration, you should set the beginning date/time starting the next day at 1:00 a.m.</p> <p>This field defaults to the last successful run date/time. If the last successful run date doesn't exist (for example, the migration failed), then the Beginning field will default to blank.</p>
Run Every	<p>Select this option and enter the interval in days that Practice Partner will generate and export the clinical summaries to Updox. The minimum number of days is 1.</p> <p>Select from the drop-down list whether you want to run the download once or schedule the download by hours, days, or months (next to the Run Every field).</p> <p>If you select the Once option, the Run Every field will be unavailable.</p> <p>When you select the Run Every option, the Day of Week and Day of Month options become unavailable.</p> <p>Because the run frequency may affect server performance, eMDs recommends running every one day during off hours (for example, 1:00 a.m.).</p> <p>This field defaults to defaults to 1 Day.</p>
Day of Week	<p>Select this option and select the day of the week (Monday-Sunday) you want Practice Partner to generate and export the clinical summaries to Updox.</p> <p>When you select the Day of Week option, the Run Every and Day of Month options become unavailable.</p>
Day of Month	<p>Select this option and select the day of the month (1-31) you want Practice Partner to generate and export the clinical summaries to Updox.</p> <p>When you select the Day of Month option, the Run Every and Day of Week options become unavailable.</p>

Field/Button	Description								
Last Successful Run	<p>This field reflects the date and time of the last successful generation of clinical summaries.</p> <p>This field defaults to the migration completion date and a time of 1:00 a.m.</p>								
Next Run	This field reflects the next run date and time (based on the selected schedule).								
Reset Last Run	Click this button to re-download historical records. A warning message appears. Use this button only when downloads have failed or have been incomplete. Re-downloading records may take several hours or days.								
Logging Detail	<p>Select the level of detail that you want the audit log to record. The UpdoxLoginMetricService log file is found in the logs folder in the Practice Partner database directory (usually p:\ppart\logs).</p> <table border="1" data-bbox="737 840 1414 1220"> <thead> <tr> <th>Select...</th> <th>To record...</th> </tr> </thead> <tbody> <tr> <td>None</td> <td>nothing.</td> </tr> <tr> <td>Basic</td> <td>the download date, time, and external system name.</td> </tr> <tr> <td>Detail</td> <td>the download date, time, external system name, and the content type. eMDs recommends only selecting this setting for troubleshooting purposes, or if you are directed to do so by Practice Partner support.</td> </tr> </tbody> </table>	Select...	To record...	None	nothing.	Basic	the download date, time, and external system name.	Detail	the download date, time, external system name, and the content type. eMDs recommends only selecting this setting for troubleshooting purposes, or if you are directed to do so by Practice Partner support.
Select...	To record...								
None	nothing.								
Basic	the download date, time, and external system name.								
Detail	the download date, time, external system name, and the content type. eMDs recommends only selecting this setting for troubleshooting purposes, or if you are directed to do so by Practice Partner support.								
OK	Click this button to save your changes and close the screen. This also will activate your schedule, if it has been updated.								
Cancel	Click this button to close the screen without saving any changes.								
Help	Click this button to access the online help.								

- Click the **OK** button. The schedule will run as specified.

Creating patients' Updox accounts

To create a patient's Updox account:

1. Click the **Patient** toolbar button. The Patient Lookup screen appears.

Account #	Name	ID	Type	Birth Date
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Figure 102. Patient Lookup screen

2. Enter the search criteria for the patient for whom you want to create an Updox account.

3. Click the **Lookup** button. The Patient Edit screen appears.

The screenshot shows a software window titled "Patient <Edit>: Collins, Anorie M". The window has a tabbed interface with the following tabs: General, Billing, Other Data, Providers, Dates, Notes, Cases, Configuration, Chart Access, and Consent. The "General" tab is active. The form contains the following fields and values:

- Patient ID: AC01
- Last Name: Collins
- First Name / MI: Anorie M
- SSN: 555-55-5555
- Date of Birth: 03/20/1970 (47y)
- Sex: F
- Marital: S
- Ethnicity: (empty)
- Race: (empty)
- Status: Active
- Suffix: (empty)
- Greeting: (empty)
- Head of H.: (empty)
- Occupation: (empty)
- Employer: (empty)
- School: (empty)
- Communication Preference: (empty)
- Preferred Language: (empty)
- Address: 210 Main Ave.
- City: Dubuque
- State: IA
- Zip Code: 52003
- USA (Country)
- Home: () -
- Work: () -
- Cell: () -
- Pager: () -
- Fax: () -
- Email: acollins@email.com
- Direct Email: (empty)
- Email Preference: (empty)

On the right side of the form, there is a "Photo" field with a placeholder box and a vertical stack of buttons: Alt IDs, Contacts, Head of H, History, Attach, Photo, and Misc. At the bottom of the window, there are buttons for OK, Cancel, Apply, New, Delete, Rmv from Acct, and Help.

Figure 103. Patient Edit screen

If the patient has an e-mail address, ensure that it is entered in the **Email** field.

4. Click the **Configuration** tab.

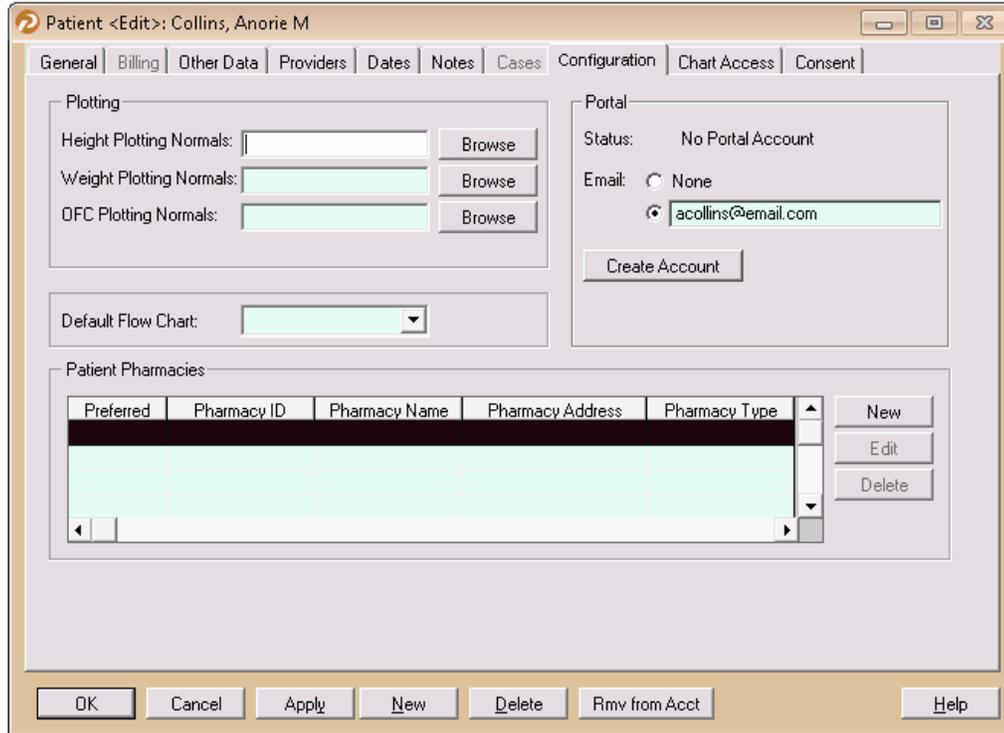


Figure 104. Patient Edit screen - Configuration tab

The following fields and button display in the **Portal** area for patients who do not have an Updox account.

Field/Button	Description
Status	The value No Portal Account displays in this field, indicating that the patient does not have an Updox account.
Email	<p>The e-mail address is used to send notifications to patients when they have new information, such as a message or health record. eMDs recommends that an e-mail address is collected before the patient's Updox account is created.</p> <p>For a patient who does have an e-mail address, the system will populate this field automatically with the e-mail address on the General tab. If the patient does not have an e-mail address entered on the General tab, you can enter it in this field.</p> <p>For a patient who does not have an e-mail address, select the None option. Updox will generate a username for the patient.</p>

Field/Button	Description
Create Account	Click this button to create an Updox account for the patient.

5. Complete the **Email** field as described above and click the **Create Account** button.

If the patient...	Then...
has an e-mail address in the system (General tab)	<p>the patient's e-mail address is used as the Updox username; however, if the Updox username already exists, or if the e-mail address exceeds 100 characters, a system-generated Updox username is created.</p> <p>The patient's e-mail will be used as the Updox notification e-mail. This is the e-mail that Updox will use to send notification alerts, such as new account registration information, password reset information, new portal message alerts, and new health record alerts. Patients can update their notification e-mail through their Updox Account Settings.</p>
does not have an e-mail address	<p>Updox generates a username and password.</p> <p>Because a registration e-mail will not be sent to the patient, you will need to open the Updox Address Book and print a card containing the patient's registration information.</p> <p>Refer to Managing patients' Updox accounts for information on opening the Updox Address Book.</p>

Managing patients' Updox accounts

Patients' portal accounts can be managed through the Updox Address Book. Clicking the **Manage Account** button on the **Configuration** tab will launch the Updox Address Book in a browser window. Users can perform actions such as re-sending a registration e-mail, resetting a patient's password, or printing a card containing login information.

To manage a patient's Updox account:

1. Click the **Patient** toolbar button. The Patient Lookup screen appears.

Account #	Name	ID	Type	Birth Date	

Figure 105. Patient Lookup screen

2. Enter the search criteria for the patient whose Updox account you want to update.

3. Click the **Lookup** button. The Patient Edit screen appears.

Patient <Edit>: Collins, Anorie M

General | Billing | Other Data | Providers | Dates | Notes | Cases | Configuration | Chart Access | Consent

Patient ID: AC01 Status: Active OK to Mail:

Last Name: Collins Suffix:

First Name / MI: Anorie M Greeting:

SSN: 555-55-5555 Head of H.:

Date of Birth: 03/20/1970 47y Occupation:

Time of Birth: Sex: F Employer:

Marital: S School:

Ethnicity: Communication Preference:

Race: Preferred Language:

Address: 210 Main Ave. Home: () -

Work: () -

City: Dubuque Cell: () -

State: IA Zip Code: 52003 USA Fax: () -

Email: acollins@email.com

Alt IDs

Contacts

Head of H

History

Attach

Photo

Misc

OK Cancel Apply New Delete Rmv from Acct Help

Figure 106. Patient Edit screen

NOTE: If you update the first name, last name, date of birth, and/or e-mail address for a patient, Practice Partner also updates the patient's Updox Portal account. However, once the patient has logged into his/her Updox account and changed his/her notification e-mail, there is no way to update the patient's notification e-mail from the Practice Partner software.

4. Click the **Configuration** tab.

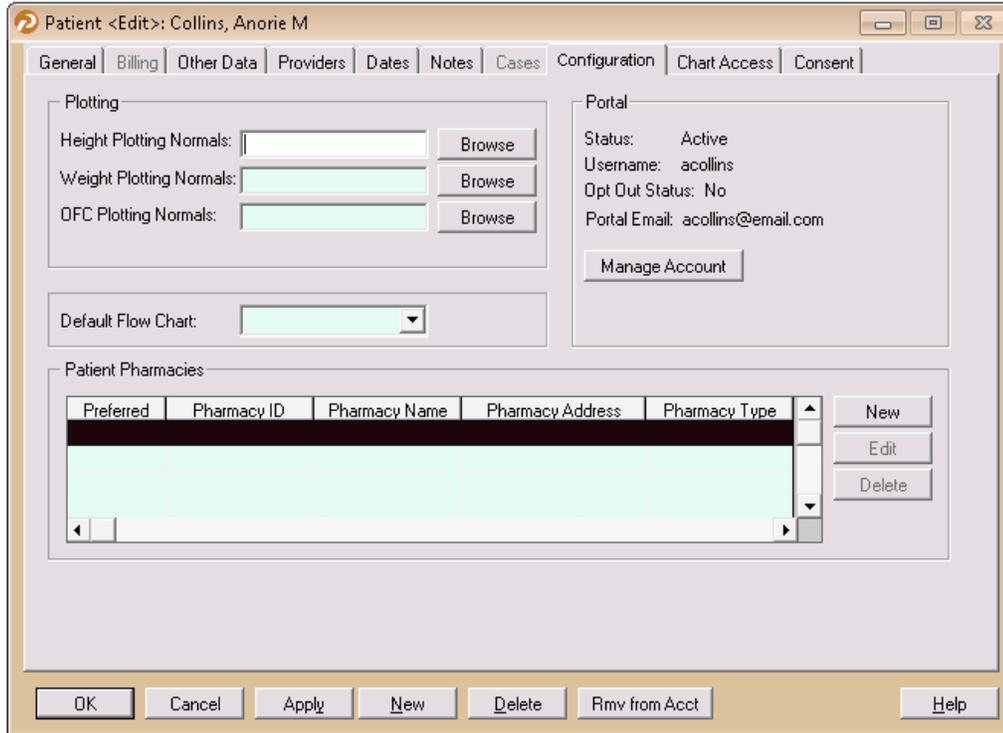


Figure 107. Patient Edit screen - Configuration tab

The following fields and button display in the **Portal** area for patients who have an Updox account.

Field/Button	Description
Status	The value Active displays in this field, indicating that the patient has an Updox account.
Username	This field indicates the patient's Updox portal username.
Opt Out Status	This field indicates the patient's Updox opt out status. When a patient "opts out," it means that the patient does not want his/her personal health information (PHI) transmitted to Updox.
Portal Email	This field indicates the patient's Updox notification e-mail address.

Field/Button	Description
Manage Account	Click this button to open the Updod Address Book screen, where you can perform maintenance tasks such as editing the patient's username and resetting the patient's password.

- 5. Click the **Manage Account** button. The Updod Address Book screen appears.
- 6. Make the necessary changes to the patient's account and save.