CareConnect Inbox and Direct Messages

REVISION HISTORY				
REV.	DESCRIPTION	DATE	CHG	APPVD
0	ORIGINAL DOCUMENT	1/22/2020	Farooq	Nancy/Matthew
1	UPDATED PROCEDURE FOR CCD DATA EXCHANGE	3/09/2020	Farooq	

## Table of Contents

Purpose

This is a new feature of Avatar, and its purpose is to send and receive Client data between host and remote computer using Avatar's CareConnect Inbox and/or Direct Messages.

Prerequisites

1. CareFabric needs to be installed on the server and available for end users.
2. Trusted Agent needs to be assigned and certification procedure needed before process can start.
3. Trusted Agent need full access for administrative procedure.
4. Trusted Agent must create account for responsible staff.
5. CareConnect Inbox access: CareConnect Inbox has two types of addresses
   i. **Direct address or Global Address.** Direct or global address looks like
      farooqahmad@icbhs.netsmartdirect.net.
   ii. Local or internal address: ICBHS internal address looks like: VANLOP@ICDMHCAPROD
6. Contact your supervisor and him/her establish an account for you before start using this feature.

CareConnect Inbox feature

Effective January 1, 2020, CareConnect Inbox is available for all clinical myAvatar users and available in the home view of authorized users.
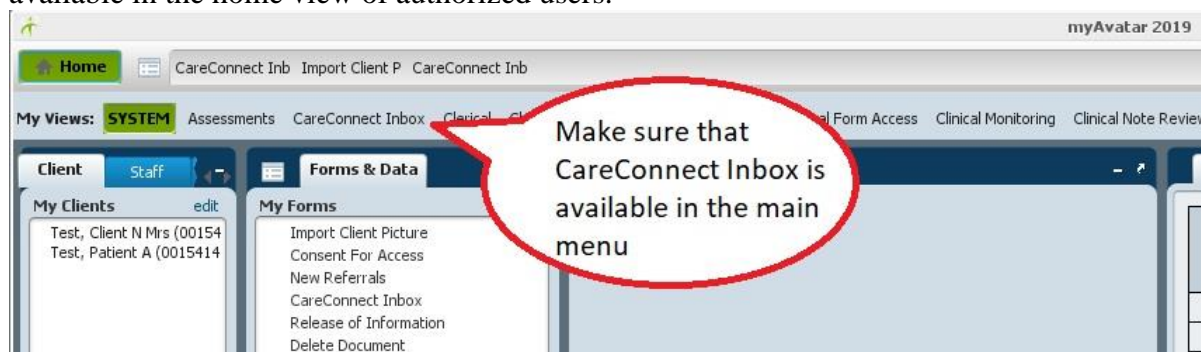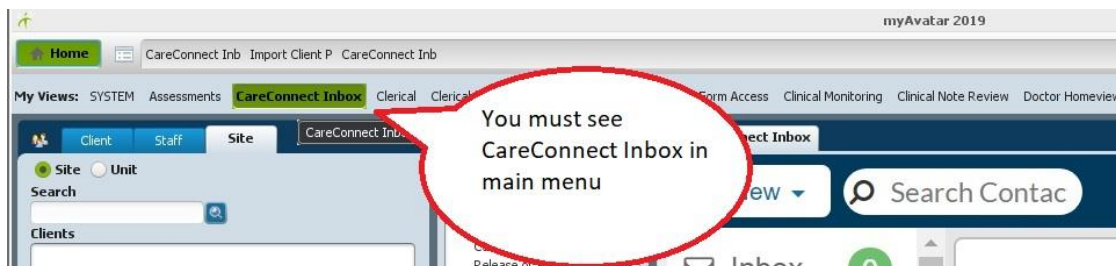
Procedure

The CareConnect Inbox and Direct messages provide the most useful tool for health information exchange (HIE) between separate organizations as well as inter-department information exchange.

How to Launch CareConnect Inbox from myAvatar

1. Launch myAvatar. Once the main screen appears, select CareConnect Inbox from the Top menu tabs.

2. Once launched CareConnect Inbox menu items appear including, Inbox, Contacts and other tabs.
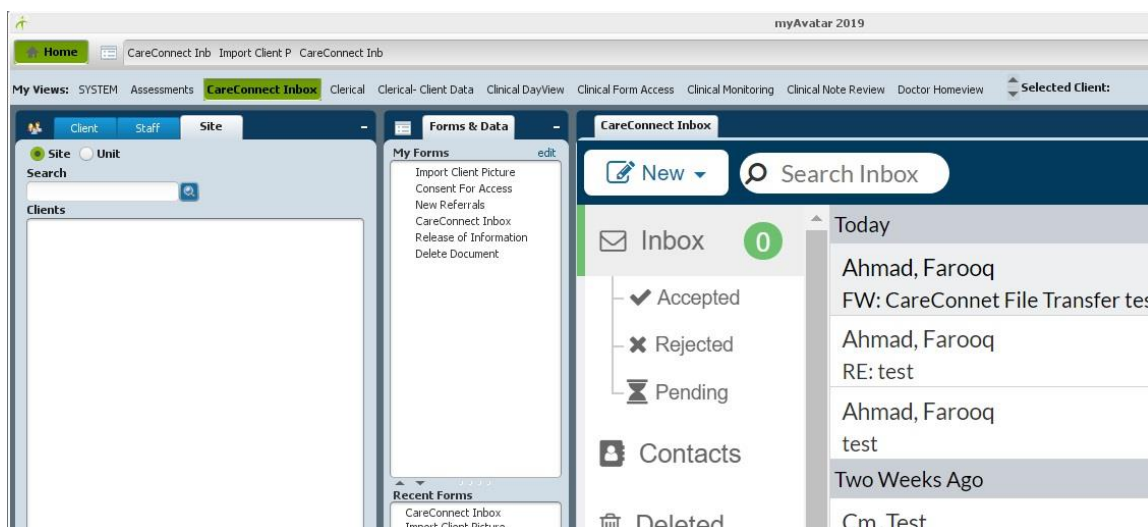
NOTES:

i.   *Make sure that "CareConnect Inbox" is visible in the main menu from your account. If not present, then CareFabric is not installed or not available for your account.*
ii.   *Contact your supervisor to install and configure the required component(s).*

Main features of CareConnect Inbox

1. Send and Receive direct messages
2. Send and Receive Documents
3. Send and receive CCD data
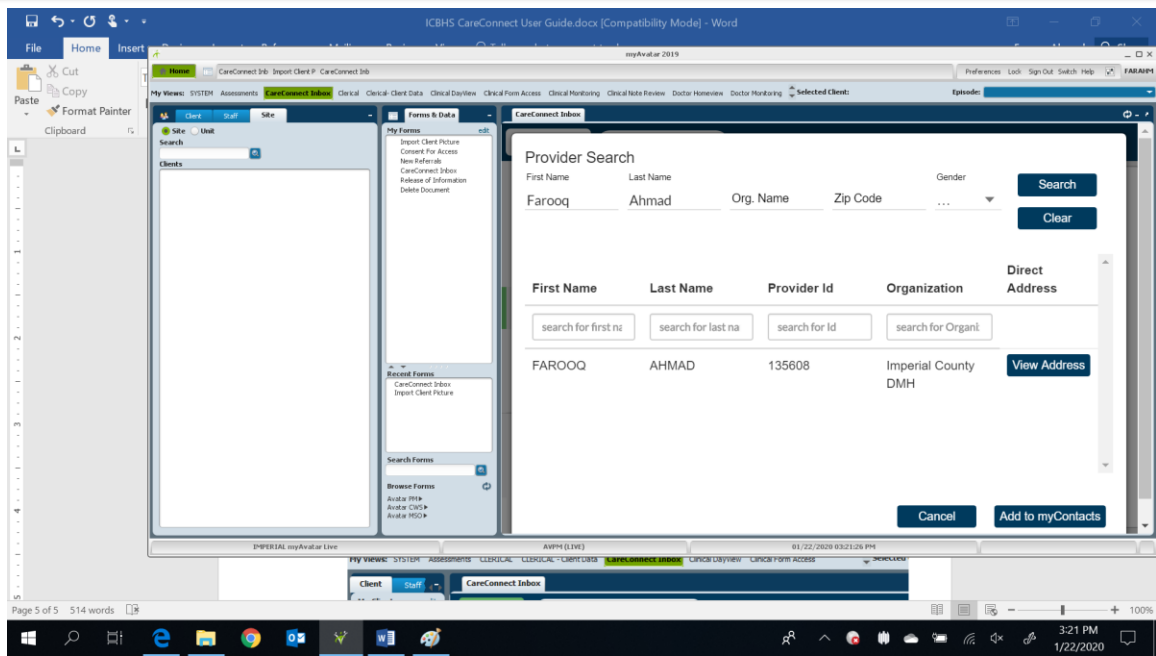
CareConnect Inbox Contacts

CareConnect Inbox is like other mail servers and allows bidirectional message transmission between any numbers of users who have the CareConnect Inbox access.

In order to compose a message, user first must find the remote users' direct address. All addresses once stored in the contacts are available for send/receive feature.
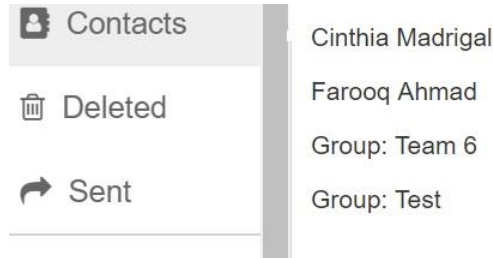
NOTES:

i.   *Every new user/provider's address needs to be added in the contacts in order to send message. This is a one-time process for every new contact.*
ii. *CareConnect provider search tool can be used to search any from database.*

CareConnect Inbox Addresses

CareConnect Inbox feature supports two types of addresses.

➢ Global Address
➢ Local Address

Global Address

1. The global contact address looks as follows: farooqahmad@icbhs.netsmartdirect.net. The address of any contact can be viewed by clicking on the View Address button.

| FAROOQ | AHMAD | 135608 | Imperial County DMH | farooqahmad@icbhs.netsmartdirect.net |

2. The global address, once listed on the NetSmart network, is visible to other domains and can be used to communicate globally with any other entity.

Local Address

1. The local address looks as follows: FARAHM@ICDMHCAPROD. Local address is tightly coupled with your Avatar login info. It is your Avatar login @ICDMHCAPROD.

NOTES:

i. *Local address has limited access to the inter-organization contacts and can NOT reach outside contacts, neither can it exchange information with outside addresses.*

ii. *Due to the local nature, it is an excellent tool for inter-department communication for data, file and message exchange.*

Send/ and Receive Direct Messages

CareConnect Inbox is like other mail servers and allows bidirectional message transmission between any numbers of users who have the CareConnect Inbox address.

1. If you have any new message in the inbox it will be highlighted. You can view and reply to your CC (CareConnect) inbox messages. CareConnect Inbox messages behave similar to the regular email messages except in the secure and encrypted manner.

2. Once the CareConnect main window is up, you will be able to send/receive message as well as exchange Client information. To start a new message, Click New and select Message.
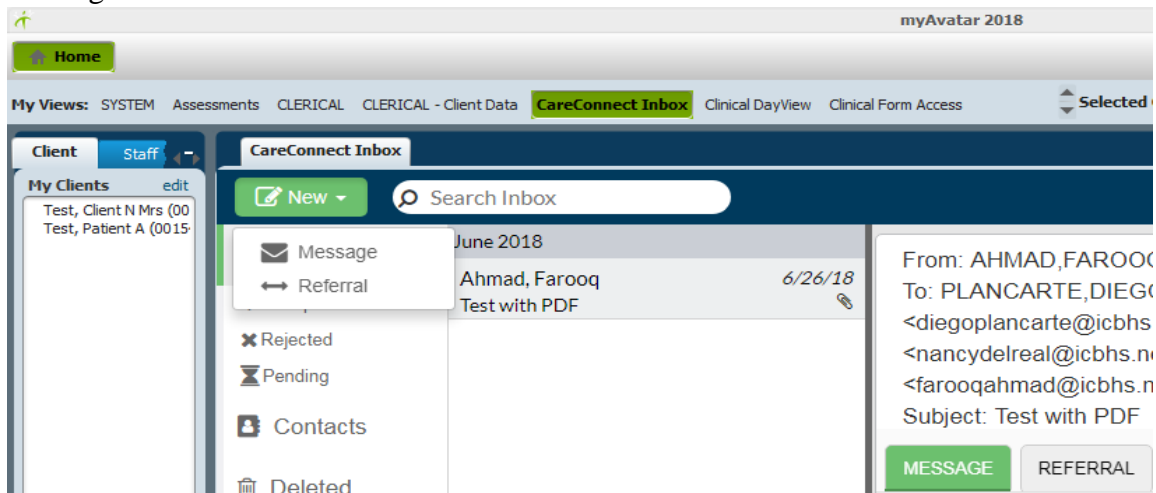
> **WARNING!**
> *Automatic refresh feature is not available. Information Systems is currently working with Netsmart engineers to implement the automatic refresh and automatic notification. We will inform everyone and help configure once the feature becomes available.*

Send and Receive Documents

This feature is an extension for the Send/ Receive direct messages and allows users to attach certain types of documents along with the message itself.
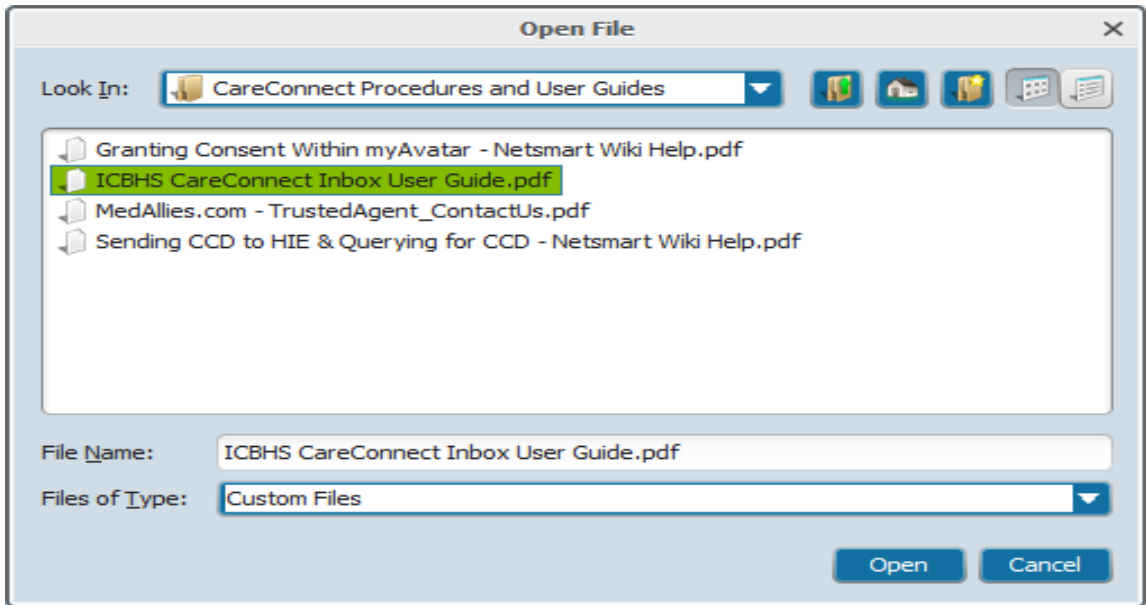
1. The procedure for Document transmission is quite similar to the regular mail server send/receive feature.
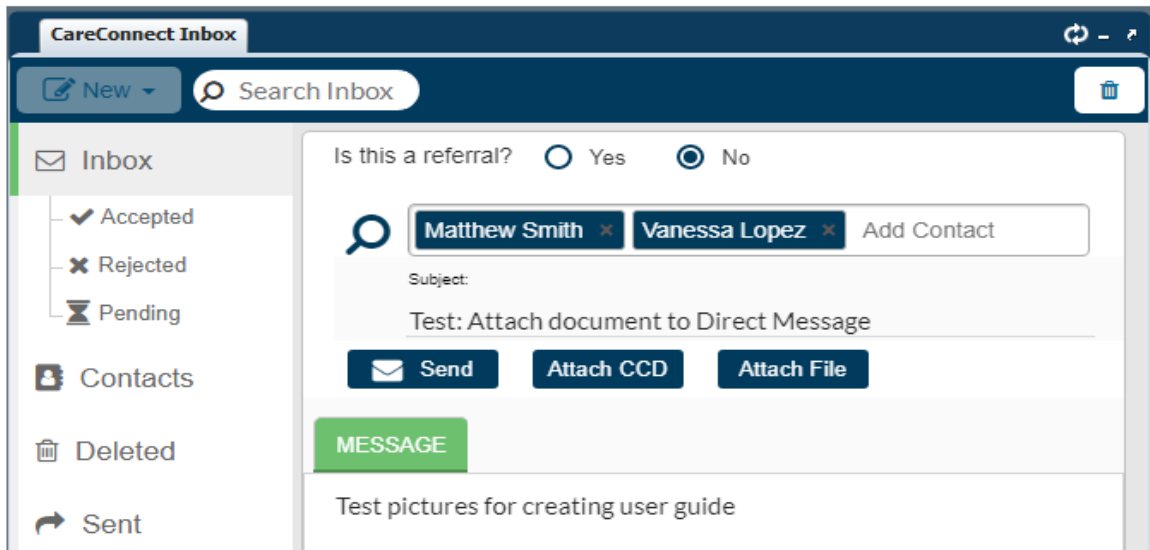
2. Select the recipient and add subject then click on Attach File button to include the file.
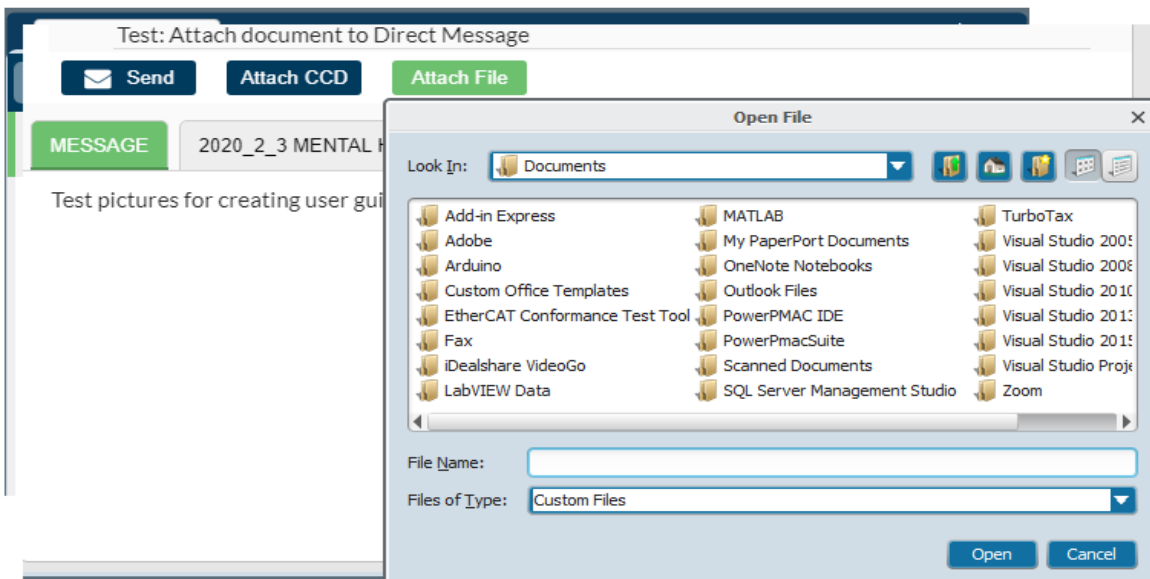
3. It is important to know that only portable format (.pdf) documents are allowed as attachments.

4. The good news is that on the recipient side, these files can be directly viewed from within the Direct message and are available for download to local drive if needed.
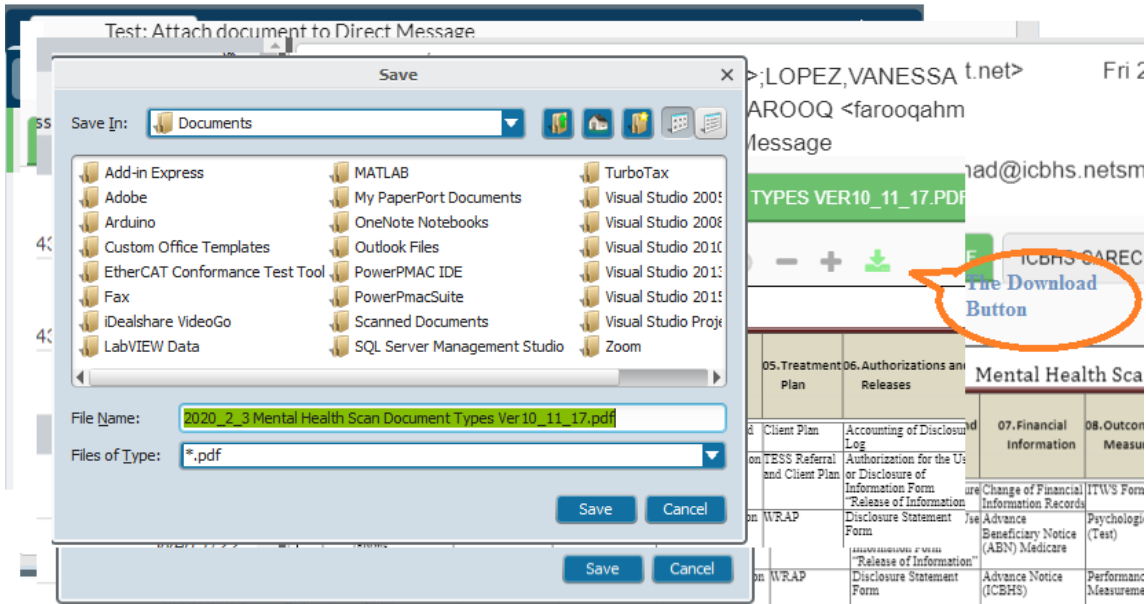
5. Also note that some other document view/navigations tools are available for Zoom and next page view right under the document tab.

CCD Data Transmission and Processing

What is CCD?
CCD stands for Continuity of Care (CCD) clinical document. Clinical documents formatted to the HL7 Consolidated Clinical Data Architecture (CCDA) standard are XML files that contain structured and unstructured patient data and can be used to support health information exchange with other EHR systems. CCDA documents can be formatted according to various document templates, such as the Continuity of Care (CCD) document template.

Send and Receive CCD
1. In addition to the data attachment, user can also use direct messages for CCD data exchange. CCD document transmission can be initiated by clicking on the New item and selecting Referral.
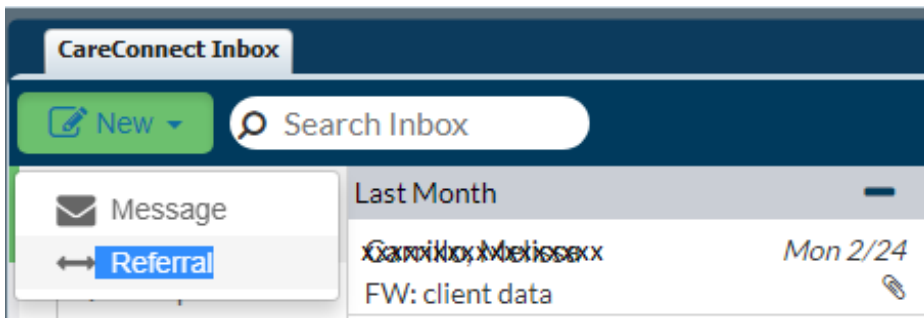
2. By selecting the correct option, it launches the new message applet with the Is this a referral? option selected.
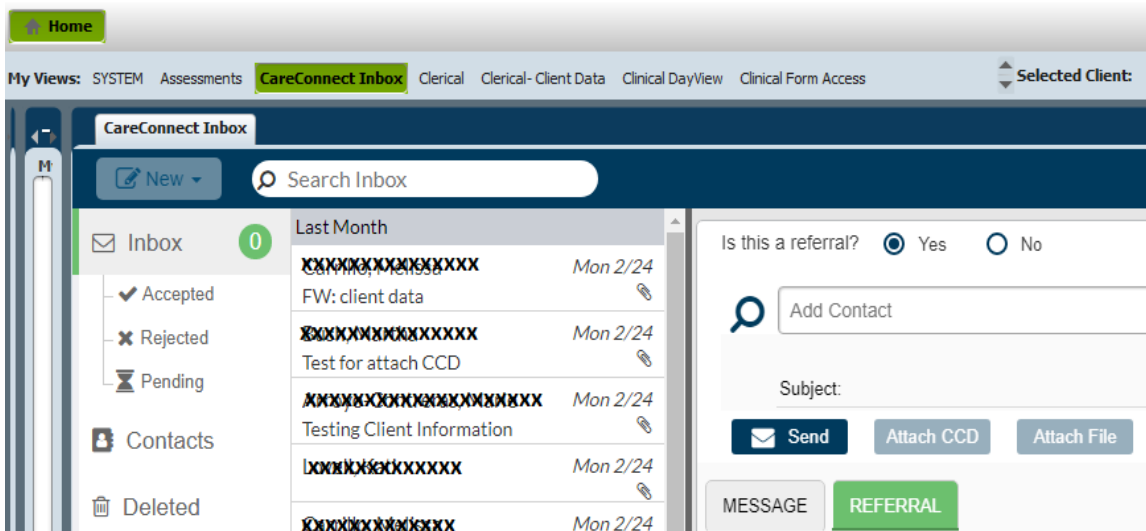
Generate CCD document and Send an attachment

1. Frist step in CCD document transmission is to add a contact as a recipient from your contact list.

2. Next, search the client and add in the Client list box.

3. User is required to fill out the other required fields:
   a. Referring Provider
   b. Reason for referral Code
4. Once recipient is added, the Attach CCD button is highlighted. Now press the Attach CCD button to create CCD document for attachment.

NOTE:

Make sure to select the client from the left pane to populate data fields before you can choose any or all sections.

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5. Once client is identified and record is displayed, select the sections from among the available record.

6. User can choose any number of sections from 1-15 from the drop-down menu or most common sections, 4 sections, 8 sections 12 sections or all 15 sections.
7. Next step is to generate CCD document for attachment. Clink on Generate CCD button the create the .XML document. Note this step may a long time to create the document. It depends on how many sections are to be included in the CCD document.

8. Next, attach the CCD document by clicking the Attach CCD button.
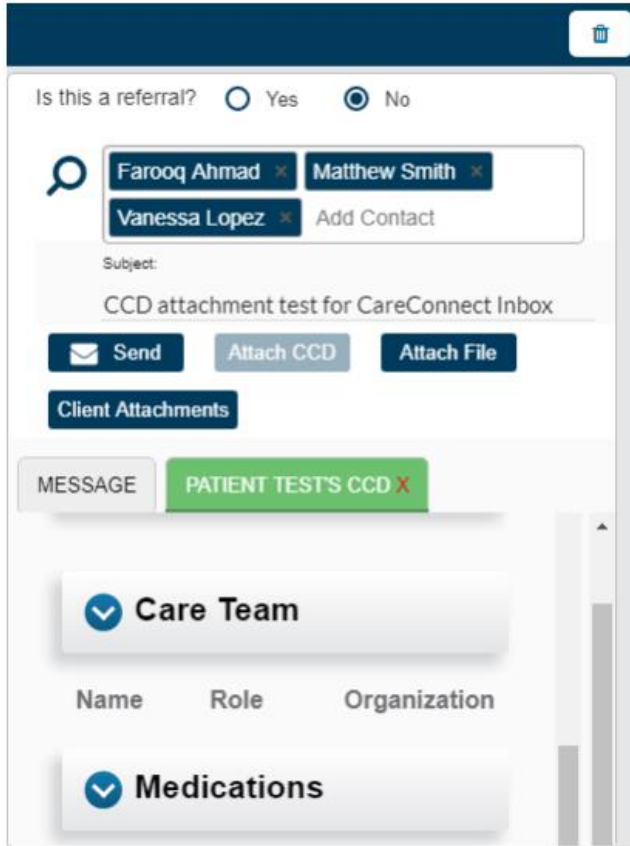
9. There is one more step before user can transmit the CCD document. It is the consent to transmit. Once you click the Send button then the following message pops up.
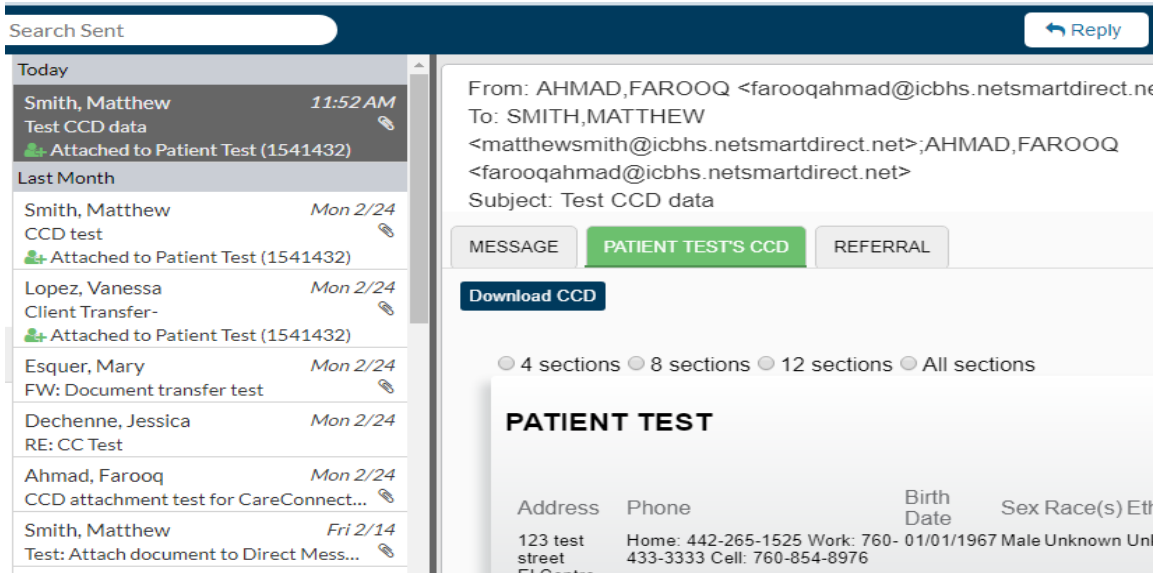
Receive and Process CCD document

1. Once a CCD attachment is received, user can import the CCD document and save it or import it directly to myAvatar database. Following steps will provide guidelines for importing CCD document into myAvatar database:

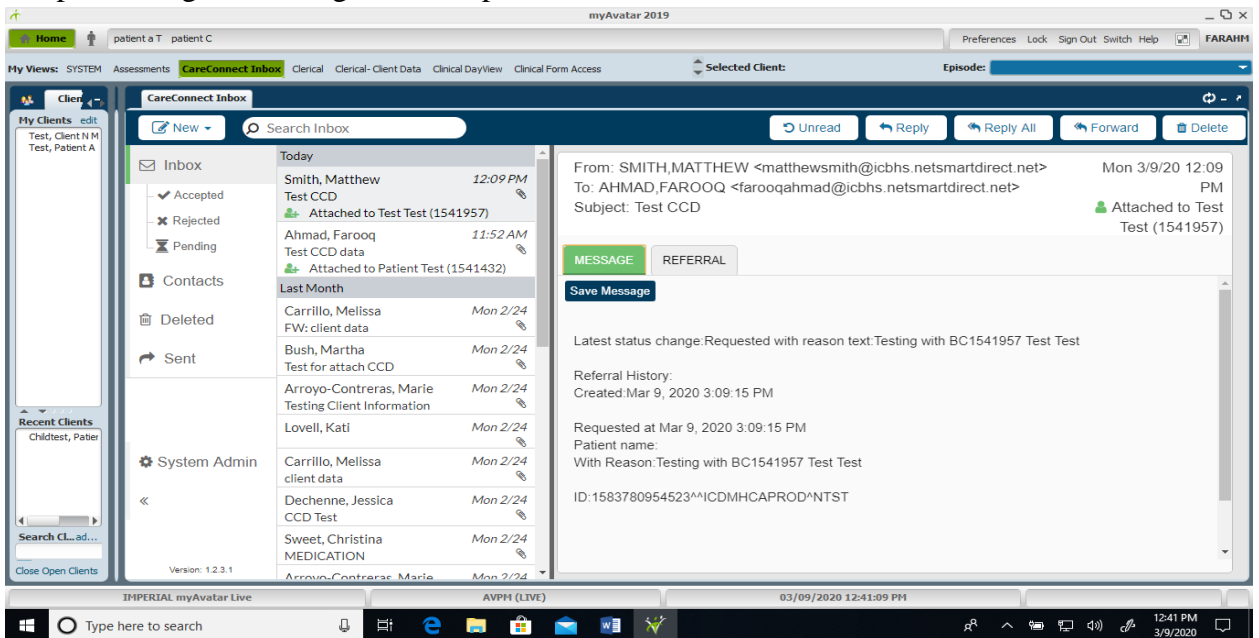2. Select the message with the CCD attachment.

3. Upon receiving the CCD attachment, user needs to download CCD document by pressing Download CCD button.
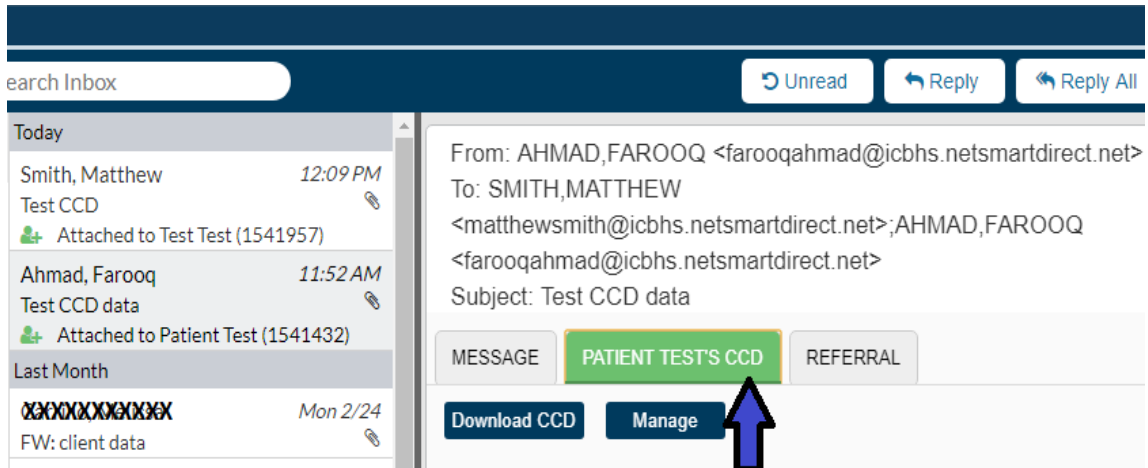

NOTE:

There are two types of CCD messages. Make sure that message has true CCD attachment. See following pictures for message with true CCD attachment.

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4. Simple message or message with simple attachment looks as follows:

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5. A CareConnect Inbox message with true CCD attachment appears as follows:

6. With a valid CCD attachment, user will have the option to download the document as an .xml file on the computer using Download CCD button or directly import the CCD to the client in Avatar database using Manage button. Following step provides details about the manage CCD option.

7. Once all the necessary fields have been filled, user can either select the client already in the database or add new client (In case the CCD document is a new referral from an outside agency).

8. Be default, Admit New Client is available at the bottom right corner of the widget.

9. If the client is already in the database and search has matched the client information, then Admit New Client is changed to Admit Existing Client.

10. Press the Admit New Client or Admit Existing Client to add the CCD information for the corresponding client in the system.

Admitting Client using CCD Attachment

1. This section provides detailed procedure about creating a new client or adding a new episode of an existing client using CCD data.
2. Further, CCD data can be saved in the documents archive using Save Data option.