



## Release of CRIS Information to Patient Portal

### *Background:*

Some Results in CRIS may be released and made viewable to the patient in the NIH Clinical Center's Patient Portal. This feature is guided by rules and policies. Please note that the patient must have an active Patient Portal account in order to view the results once they have been released.

The Medical Executive Committee (MEC) has determined which types of test results can be released to the Portal.

Only LIP's, Research Nurses, and Ad Hoc staff given special permission by MRD will have the ability to release test results to the Patient Portal.

Only results which have been assigned a status of **Final**, **Modified** or **Corrected** are eligible to be released to the Patient Portal. Note: tests that were resulted beginning as early as **January 1, 2013** may cross over to the Portal; these tests may have been ordered at an earlier date in 2012.

Every orderable test in CRIS is associated with one of three different release policies.

The three release policies are defined as:

1. No Release – the test result can never be released to the Portal.
2. Manual Release – the clinician must manually release the test for it to be viewable in the Portal. The result will not be available in the Portal if not manually released by the clinician.
3. AutoRelease – the test will be automatically released by the system to the Portal in 7 days **OR** may be manually released by the clinician prior to 7 days if desired.

Order Comments that are associated with a Result which has an AutoRelease policy assignment will not be sent to the Portal. Orders Comments associated with a Result which has a Manual Release policy assignment are removed from the Portal 24 hours after Manual Release.

The LIP can recall (remove) a result from the Portal after it has been released if desired. In addition, the LIP can prevent the AutoRelease of a result to the Portal (refer to section II).

Note: Patients can continue to request hard copies of their medical record through the Medical Record Department.

## I. Results

### a. How to Check Which Results Have Been Released to the Portal:

#### 1. With the desired patient selected in CRIS, select the **Results** tab.

The screenshot shows the Eclipsys Gateway interface for patient MAYPPONE, ONE TEST (CRC-35W-5). The patient's chief complaint is ATTENTION DEFICIT/HYPERACTIVITY DISORDER, and the protocol is 90-CC-0168. The Results tab is selected in the top navigation bar. The interface displays a toolbar with various icons, a patient information header, and a table of test results. The Results tab is highlighted in the top navigation bar.

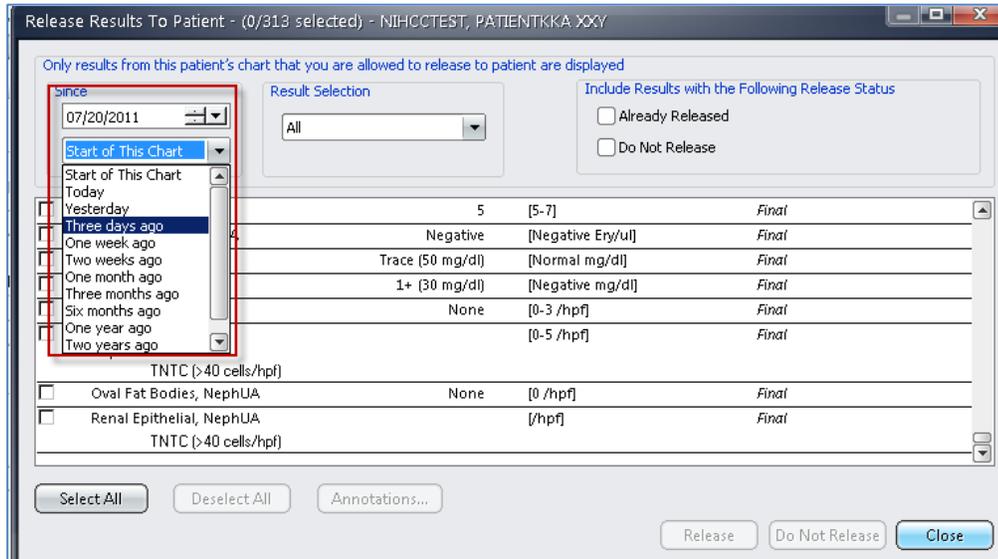
Date/Time	Test Name	Value	Reference Range
05/30/2013 08:52	Calcium, Urine	5.00	[0.12-8.92 mmol/L]
05/30/2013 08:52	PT	15.0	[11.6-15.2 sec]
05/30/2013 08:52	aPTT	45.0	[25.3-37.3 sec]

#### 2. Select the **Release to Patient** icon on the tab level toolbar. Note: if the icon is greyed out (not active), this may be due to the patient not having registered for the Portal; staff not having security rights; OR there not being any results eligible to be released.

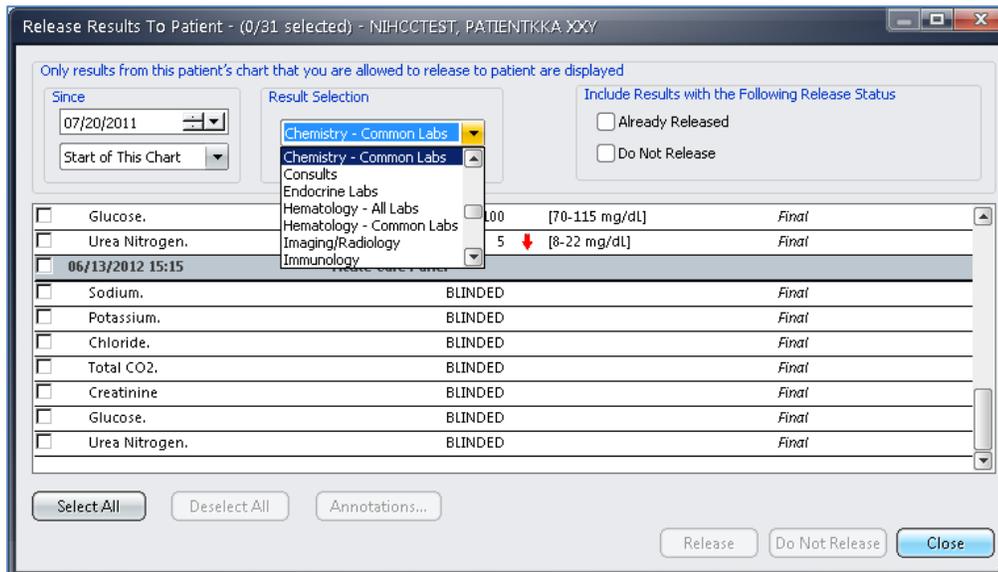
The screenshot shows the Eclipsys Gateway interface for patient MAYPPONE, ONE TEST (CRC-35W-5). The patient's chief complaint is ATTENTION DEFICIT/HYPERACTIVITY DISORDER, and the protocol is 90-CC-0168. The Results tab is selected in the top navigation bar. The interface displays a toolbar with various icons, a patient information header, and a table of test results. The Release to Patient icon is highlighted in the top navigation bar.

Date/Time	Test Name	Value	Reference Range
05/30/2013 08:52	Calcium, Urine	5.00	[0.12-8.92 mmol/L]
05/30/2013 08:52	PT	15.0	[11.6-15.2 sec]
05/30/2013 08:52	aPTT	45.0	[25.3-37.3 sec]

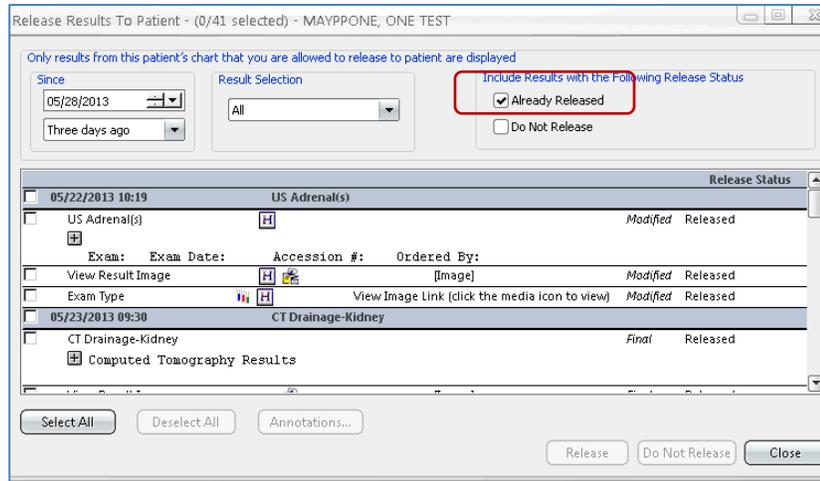
3. Set the **Since** filter for the desired time frame.



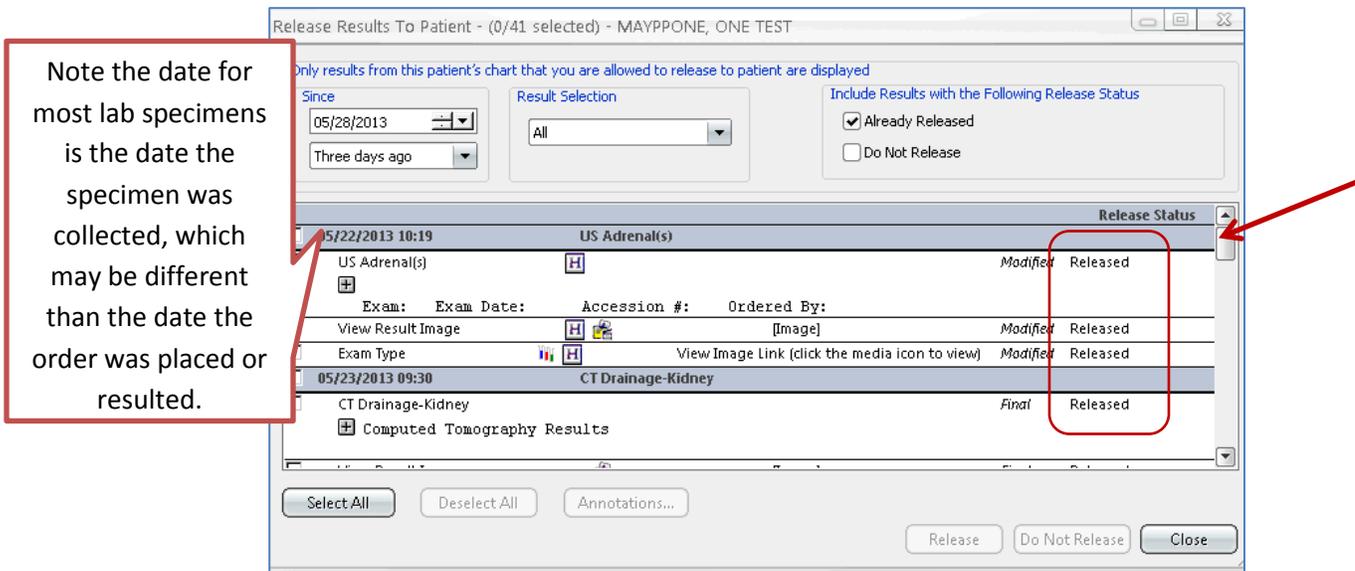
4. Set the **Result Selection** filter to the desired option.



5. Select the **Already Released** checkbox.

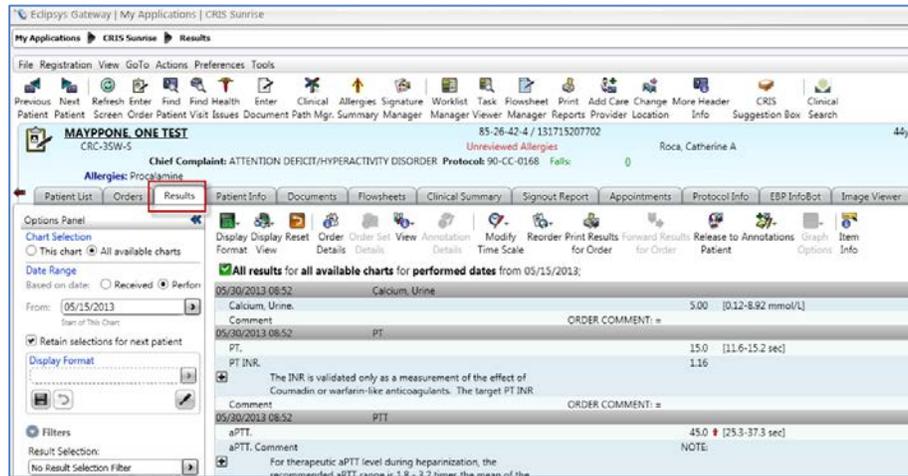


6. Note that the results will display a **Release Status** of **Released** if already released to Portal. Note: use the scroll bar to determine what has already been released.

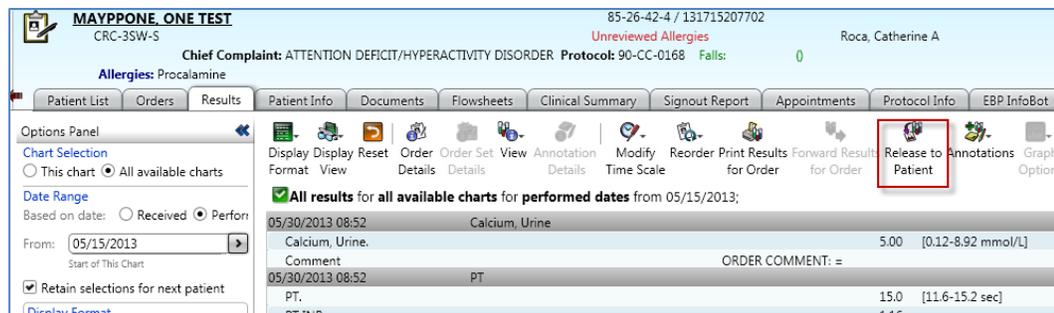


b. How to Check Which Results have been manually set to a status of **Do Not Release**:

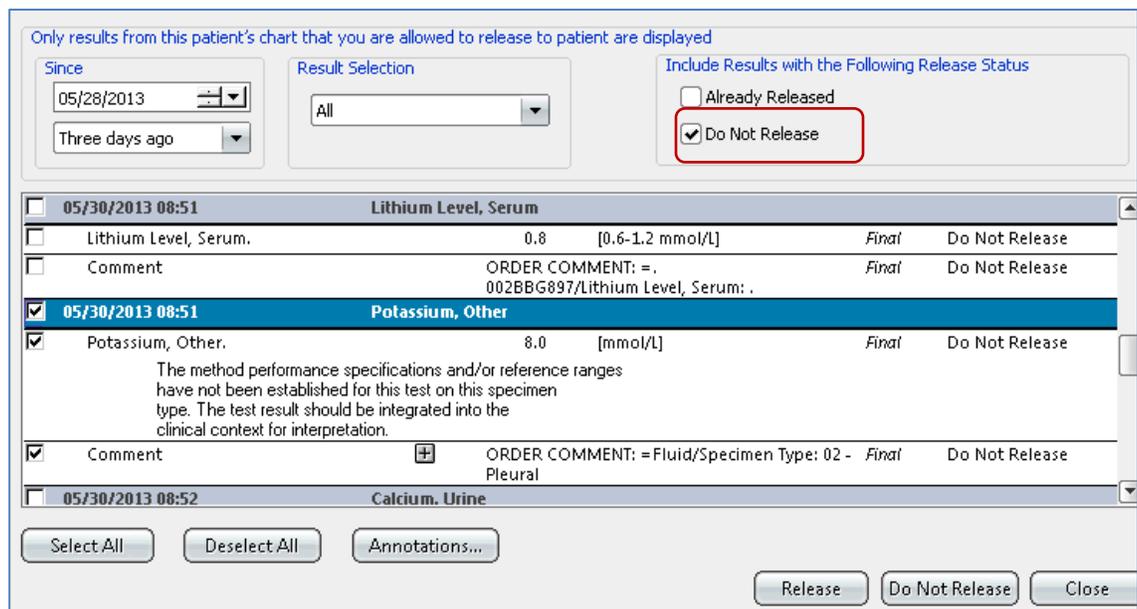
1. With the desired patient selected in CRIS, select the **Results** tab.



2. Select the **Release to Patient** icon on the tab level toolbar.



3. Select the **Do Not Release** checkbox.



4. The results not eligible to be released will display with a status of **Do Not Release**.

Only results from this patient's chart that you are allowed to release to patient are displayed

Since: 05/28/2013 Three days ago

Result Selection: All

Include Results with the Following Release Status:  Already Released  Do Not Release

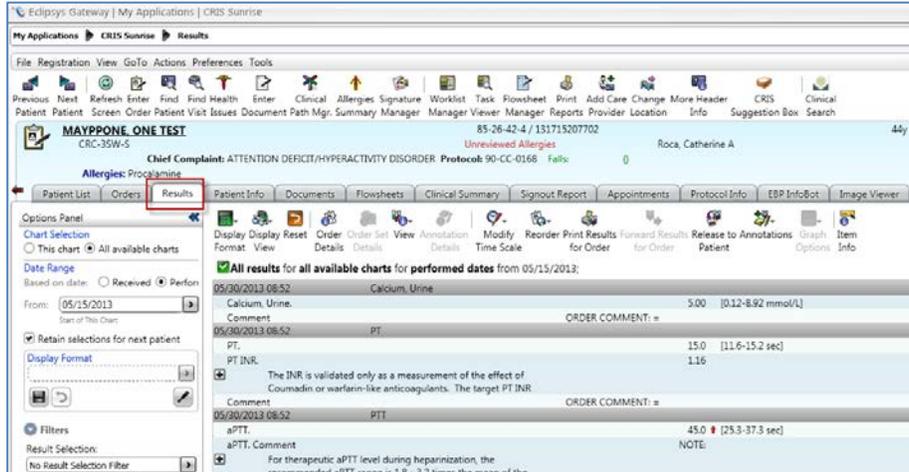
05/30/2013 08:51 Lithium Level, Serum	
<input type="checkbox"/>	Lithium Level, Serum. 0.8 [0.6-1.2 mmol/L] Final Do Not Release
<input type="checkbox"/>	Comment ORDER COMMENT: = . 002BBG897/Lithium Level, Serum: . Final Do Not Release
05/30/2013 08:51 Potassium, Other	
<input checked="" type="checkbox"/>	Potassium, Other. 8.0 [mmol/L] Final Do Not Release The method performance specifications and/or reference ranges have not been established for this test on this specimen type. The test result should be integrated into the clinical context for interpretation.
<input checked="" type="checkbox"/>	Comment + ORDER COMMENT: =Fluid/Specimen Type: 02 - Pleural Final Do Not Release
05/30/2013 08:52 Calcium, Urine	

Select All Deselect All Annotations...

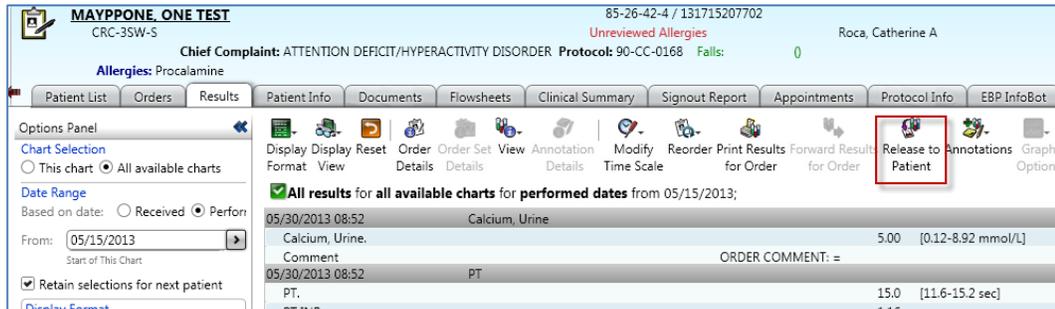
Release Do Not Release Close

c. How to Manually Release Results to the Patient Portal: (includes results that must be manually released as well as those that will be auto released after 7 days of posting in CRIS as final):

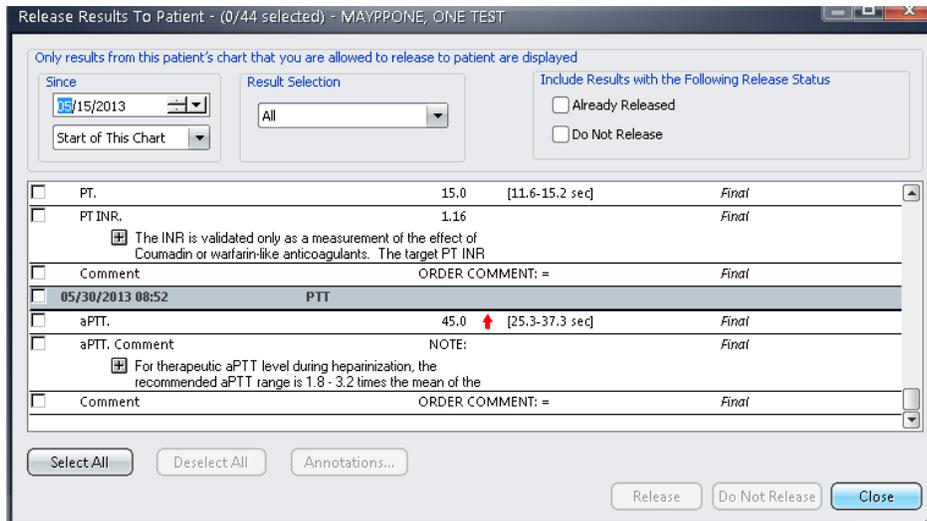
1. With the desired patient selected in CRIS, select the **Results** tab.



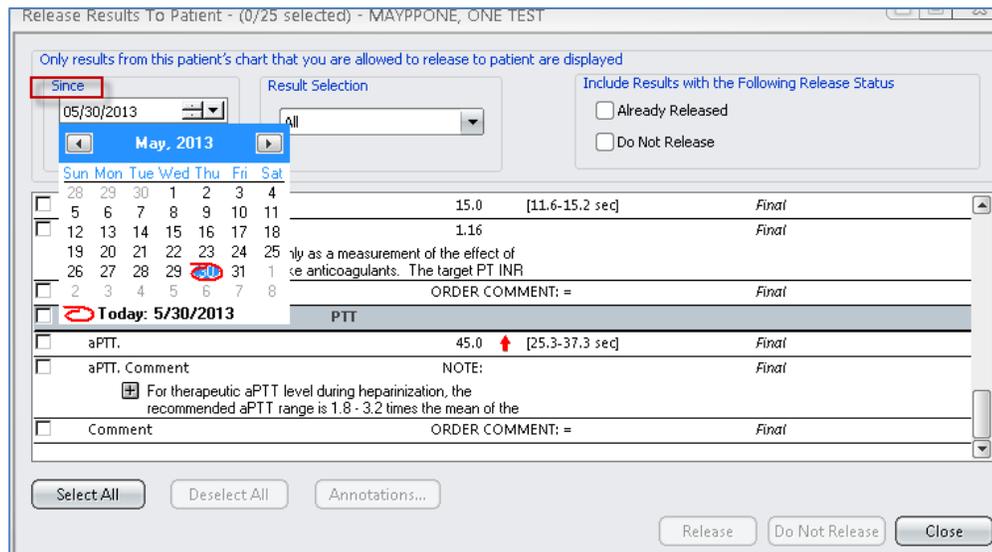
2. Select the **Release to Patient** icon on the tab level toolbar.



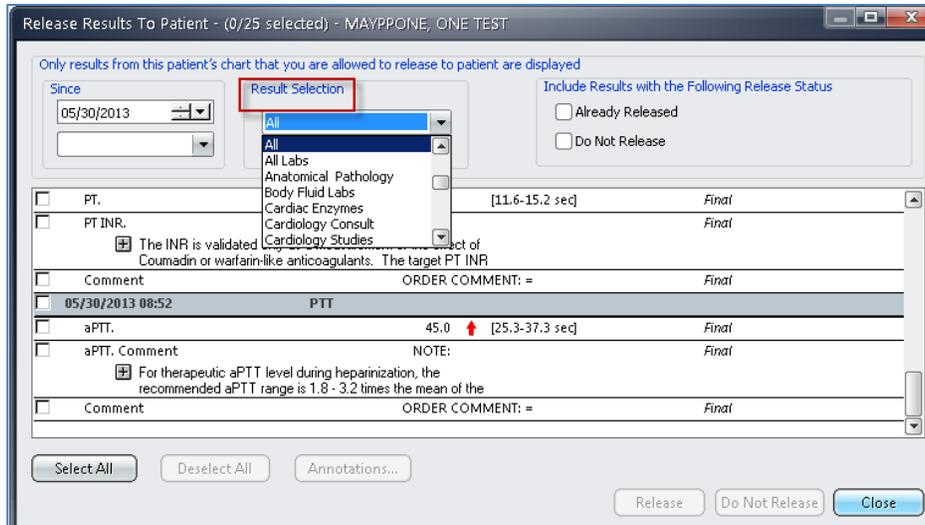
- The **Release Results to Patient** dialogue window displays. Note: this default list will include all test results that are eligible for release per the MEC (both Manual release and AutoRelease tests are included in this list, but are not differentiated as such).



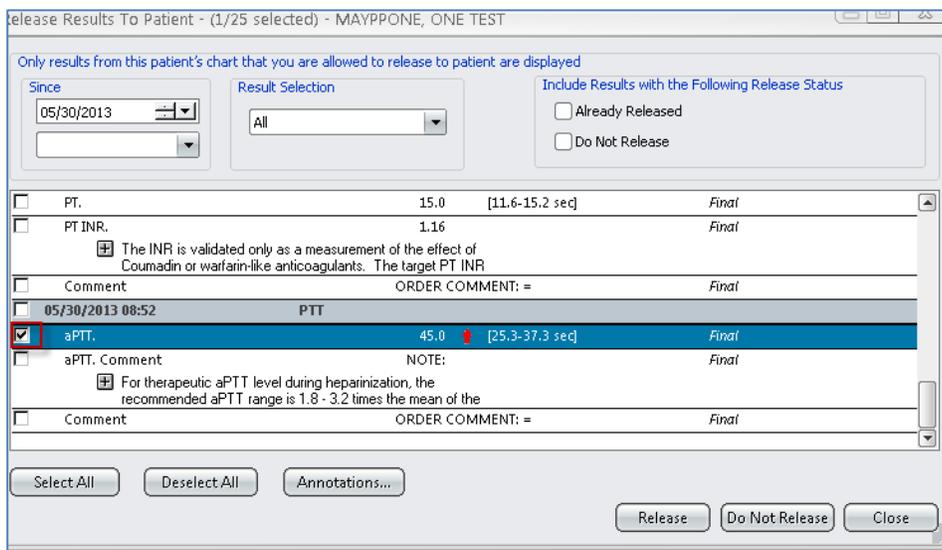
- Set the **Since** field to the desired date (using the calendar).



5. Set the **Result Selection** field to the desired option.



6. Select the desired result(s) (check mark in box).



7. Click the **Release** button.

Release Results To Patient - (1/25 selected) - MAYPPONE, ONE TEST

Only results from this patient's chart that you are allowed to release to patient are displayed

Since: 05/30/2013  
Result Selection: All  
Include Results with the Following Release Status:  
 Already Released  
 Do Not Release

<input type="checkbox"/>	PT.	15.0	[11.6-15.2 sec]	Final
<input type="checkbox"/>	PT INR.	1.16		Final
<input type="checkbox"/>	The INR is validated only as a measurement of the effect of Coumadin or warfarin-like anticoagulants. The target PT INR			
<input type="checkbox"/>	Comment	ORDER COMMENT: =		Final
<input type="checkbox"/>	05/30/2013 08:52	PTT		
<input checked="" type="checkbox"/>	aPTT.	45.0	[25.3-37.3 sec]	Final
<input type="checkbox"/>	aPTT. Comment	NOTE:		Final
<input type="checkbox"/>	For therapeutic aPTT level during heparinization, the recommended aPTT range is 1.8 - 3.2 times the mean of the			
<input type="checkbox"/>	Comment	ORDER COMMENT: =		Final

Select All Deselect All Annotations... Release Do Not Release Close

8. For results with a Manual Release policy: the following message will display for **each** result. Click the **Yes** button to send the result to the Portal.

Sunrise Clinical Manager

 This order <Lithium Level, Serum> requires confirmation prior to releasing any of its results to the patient.  
You have selected <2> results from this order to release to patient.  
Please confirm that you want to release the selected results.

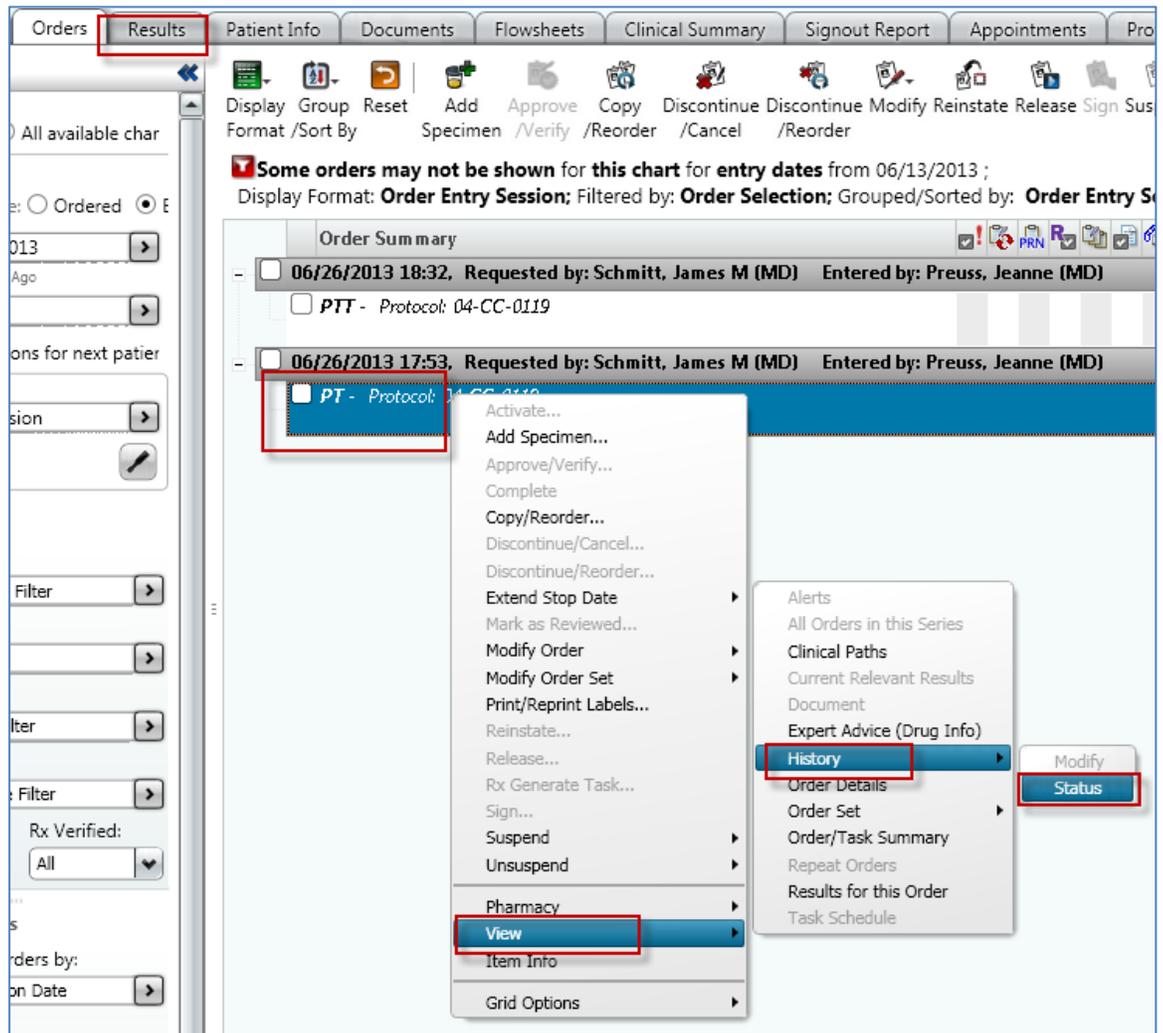
Yes No

9. The result(s) will now be available for viewing by the patient in the Patient Portal.

d. How to Determine That a Result has Been Manually Released to the Portal:

You can view that a result has been manually released to the portal, including the date, time, and name of clinician releasing the result.

1. From the **Orders** tab, locate and highlight/select the desired order. Right click on the order, select **View**→**History**→**Status** from the shortcut menu.



- The **Order Status History** window will display. See the Result flagged as available to patient item.

Order Status History

**Current Order Information**

Date: 06/26/2013 Time: 18:12 Status: Final Results

Order Name: PT

Requested by: Schmitt, James M To Be Verified By:

Summary: Protocol: 04-CC-0119

ID	Function	Signed	When	Who Entered	Who Requested	Source	New Status	Reason
201	New	No	06/26/2013 17:53	Preuss, Jeanne (MD)	Schmitt, James M (MD)	Telephone	Pending Collection	<Session:> Today Outpt/Current Inpt;*Auto Activate.
202	Specimen Received		06/26/2013 18:13	Interfaces, HL7 (IT)	Received, HL7 Interfaces (IT)		Specimen Collected	Filler Order ID: <1_13182620778 5> Filler Facility ID: <SCC>
203	Specimen Received		06/26/2013 18:13	Interfaces, HL7 (IT)	Received, HL7 Interfaces (IT)		Specimen Collected	Filler Order ID: <1_13182620778 5> Filler Facility ID: <SCC>
204	Resulted		06/26/2013 18:13	Interfaces, HL7 (IT)	Schmitt, James M (MD)		Final Results	Filler Order ID: <1_13182620778 5> Filler Facility ID: <SCC>
205	Result flagged as available to patient		06/26/2013 18:24	Preuss, Jeanne (MD)			Final Results	All Components

Close Help

- e. How to Prevent a Result from Displaying in the Portal (Change the Test Status to **Do Not Release**):

The clinician can manually change the status of a result to **Do Not Release**. By doing so, the result will not display in the Portal.

1. From the **Release Results to Patient** dialogue window, select the desired order by using the checkbox.

Release Results To Patient - (1/22 selected) - MAYPPONE, ONE TEST

Only results from this patient's chart that you are allowed to release to patient are displayed

Since: 06/01/2013, Three days ago

Result Selection: All

Include Results with the Following Release Status:  Already Released,  Do Not Release

<input type="checkbox"/>	Magnesium.	0.50	↓	[0.64-0.95 mmol/L]	Final
<input type="checkbox"/>	Phosphorus.	2.0	↓	[2.5-4.8 mg/dL]	Final
<input type="checkbox"/>	Comment	ORDER COMMENT: =			Final
<b>06/03/2013 18:44 Hepatic Panel</b>					
<input type="checkbox"/>	Alkaline Phosphatase.	12	↓	[37-116 U/L]	Final
<input type="checkbox"/>	Alanine Aminotransferase.	45	↑	[6-41 U/L]	Final
<input type="checkbox"/>	Aspartate Aminotransferase.	5	↓	[9-34 U/L]	Final
<input checked="" type="checkbox"/>	Bilirubin, Total.	1.0		[0.1-1.0 mg/dL]	Final
<input type="checkbox"/>	Bilirubin, Direct.	1.0	↑	[0.0-0.2 mg/dL]	Final
<input type="checkbox"/>	Comment	ORDER COMMENT: =			Final

Select All Deselect All Annotations...

Release Do Not Release Close

2. Select the **Do Not Release** button.

Release Results To Patient - (1/22 selected) - MAYPPONE, ONE TEST

Only results from this patient's chart that you are allowed to release to patient are displayed

Since: 06/01/2013, Three days ago

Result Selection: All

Include Results with the Following Release Status:  Already Released,  Do Not Release

<input type="checkbox"/>	Magnesium.	0.50	↓	[0.64-0.95 mmol/L]	Final
<input type="checkbox"/>	Phosphorus.	2.0	↓	[2.5-4.8 mg/dL]	Final
<input type="checkbox"/>	Comment	ORDER COMMENT: =			Final
<b>06/03/2013 18:44 Hepatic Panel</b>					
<input type="checkbox"/>	Alkaline Phosphatase.	12	↓	[37-116 U/L]	Final
<input type="checkbox"/>	Alanine Aminotransferase.	45	↑	[6-41 U/L]	Final
<input type="checkbox"/>	Aspartate Aminotransferase.	5	↓	[9-34 U/L]	Final
<input checked="" type="checkbox"/>	Bilirubin, Total.	1.0		[0.1-1.0 mg/dL]	Final
<input type="checkbox"/>	Bilirubin, Direct.	1.0	↑	[0.0-0.2 mg/dL]	Final
<input type="checkbox"/>	Comment	ORDER COMMENT: =			Final

Select All Deselect All Annotations...

Release Do Not Release Close

- The result now has a status of **Do Not Release** and will not be released to the Portal.

Release Results To Patient - (0/22 selected) - MAYPPONE, ONE TEST

Only results from this patient's chart that you are allowed to release to patient are displayed

Since: 06/01/2013  
Three days ago

Result Selection: All

Include Results with the Following Release Status:  
 Already Released  
 Do Not Release

<input type="checkbox"/>	Magnesium.	0.50	↓	[0.64-0.95 mmol/L]	Final	
<input type="checkbox"/>	Phosphorus.	2.0	↓	[2.5-4.8 mg/dL]	Final	
<input type="checkbox"/>	Comment	ORDER COMMENT: =			Final	
<input type="checkbox"/>	<b>06/03/2013 18:44 Hepatic Panel</b>					
<input type="checkbox"/>	Alkaline Phosphatase.	12	↓	[37-116 U/L]	Final	
<input type="checkbox"/>	Alanine	45	↑	[6-41 U/L]	Final	
<input type="checkbox"/>	Aspartate	5	↓	[9-34 U/L]	Final	
<input type="checkbox"/>	Bilirubin, Total.	1.0		[0.1-1.0 mg/dL]	Final	Do Not Release
<input type="checkbox"/>	Bilirubin, Direct.	1.0	↑	[0.0-0.2 mg/dL]	Final	
<input type="checkbox"/>	Comment	ORDER COMMENT: =			Final	

Select All   Deselect All   Annotations...

Release   Do Not Release   Close

f. How to Release Results that are in a **Do Not Release** Status:

1. From the Release Results to Patient dialogue window, select the **Do Not Release** checkbox. This will display test items that are in a **Do Not Release** status.

(Note: prior to changing this status, please consider that another provider has actively made a decision to place that result in a **Do Not Release** status).

Only results from this patient's chart that you are allowed to release to patient are displayed

Since: 05/28/2013 (Three days ago) | Result Selection: All | Include Results with the Following Release Status:  Already Released,  Do Not Release

Time	Test Name	Value	Reference Range	Status	Release Status
05/30/2013 08:51	Lithium Level, Serum	0.8	[0.6-1.2 mmol/L]	Final	Do Not Release
	Comment	ORDER COMMENT: = . 002BBG897/Lithium Level, Serum: .		Final	Do Not Release
05/30/2013 08:51	Potassium, Other	8.0	[mmol/L]	Final	Do Not Release
	Comment	The method performance specifications and/or reference ranges have not been established for this test on this specimen type. The test result should be integrated into the clinical context for interpretation.		Final	Do Not Release
05/30/2013 08:52	Calcium, Urine				

Select All | Deselect All | Annotations... | Release | Do Not Release | Close

2. Select the desired items using the appropriate checkbox.

Only results from this patient's chart that you are allowed to release to patient are displayed

Since: 05/28/2013 (Three days ago) | Result Selection: All | Include Results with the Following Release Status:  Already Released,  Do Not Release

Time	Test Name	Value	Reference Range	Status	Release Status
05/30/2013 08:51	Lithium Level, Serum	0.8	[0.6-1.2 mmol/L]	Final	Do Not Release
	Comment	ORDER COMMENT: = . 002BBG897/Lithium Level, Serum: .		Final	Do Not Release
05/30/2013 08:51	Potassium, Other	8.0	[mmol/L]	Final	Do Not Release
	Comment	The method performance specifications and/or reference ranges have not been established for this test on this specimen type. The test result should be integrated into the clinical context for interpretation.		Final	Do Not Release
05/30/2013 08:52	Calcium, Urine				

Select All | Deselect All | Annotations... | Release | Do Not Release | Close

3. Click the **Release** button.

Only results from this patient's chart that you are allowed to release to patient are displayed

Since: 05/28/2013  
Three days ago

Result Selection: All

Include Results with the Following Release Status:  
 Already Released  
 Do Not Release

05/30/2013 08:51 Lithium Level, Serum				
<input type="checkbox"/>	Lithium Level, Serum.	0.8	[0.6-1.2 mmol/L]	Final Do Not Release
<input type="checkbox"/>	Comment	ORDER COMMENT: = .		Final Do Not Release
	002BBG897/Lithium Level, Serum: .			
05/30/2013 08:51 Potassium, Other				
<input checked="" type="checkbox"/>	Potassium, Other.	8.0	[mmol/L]	Final Do Not Release
	The method performance specifications and/or reference ranges have not been established for this test on this specimen type. The test result should be integrated into the clinical context for interpretation.			
<input checked="" type="checkbox"/>	Comment	ORDER COMMENT: = Fluid/Specimen Type: 02 - Pleural		Final Do Not Release
05/30/2013 08:52 Calcium, Urine				

Select All Deselect All Annotations...

**Release** Do Not Release Close

4. A confirmation message will display.

Sunrise Clinical Manager

 This order <Potassium, Other> requires confirmation prior to releasing any of its results to the patient.

You have selected <2> results from this order to release to patient.  
<2> of these results had already been flagged as do not release – if you continue it (they) will be released.

Please confirm that you want to release the selected results.

Yes No

5. Click the **Yes** button.

- The result has been released to the Portal. The result now displays on the **Already Released** list.

Release Results To Patient - (0/43 selected) - MAYPPONE, ONE TEST

Only results from this patient's chart that you are allowed to release to patient are displayed

Since: 05/28/2013  
Three days ago

Result Selection: All

Include Results with the Following Release Status:  
 Already Released  
 Do Not Release

<input type="checkbox"/>	Nucleated RBC Absolute	1.00	↑ [0.00-0.01 K/uL]	Final	
<input type="checkbox"/>	Comment	ORDER COMMENT: =		Final	
<input type="checkbox"/>	<b>05/30/2013 08:51 Potassium, Other</b>				
<input type="checkbox"/>	Potassium, Other.	8.0	[mmol/L]	Final	Released
	The method performance specifications and/or reference ranges have not been established for this test on this specimen type. The test result should be integrated into the clinical context for interpretation.				
<input type="checkbox"/>	Comment	ORDER COMMENT: = Fluid/Specimen Type: 02 - Pleural		Final	Released
<input type="checkbox"/>	<b>05/30/2013 08:52 Calcium, Urine</b>				
<input type="checkbox"/>	Calcium, Urine.	5.00	[0.12-8.92 mmol/L]	Final	

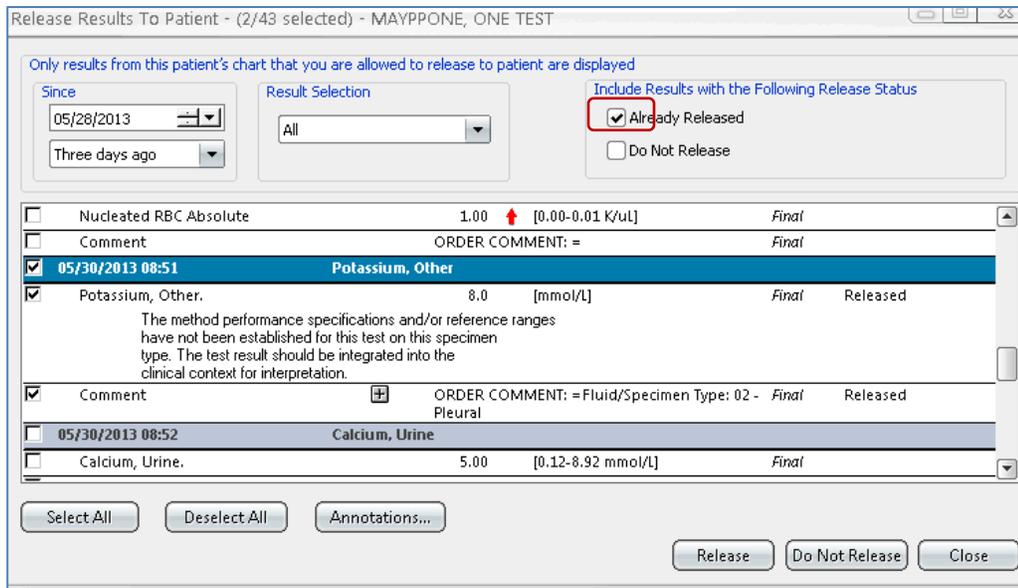
Select All    Deselect All    Annotations...

Release    Do Not Release    Close

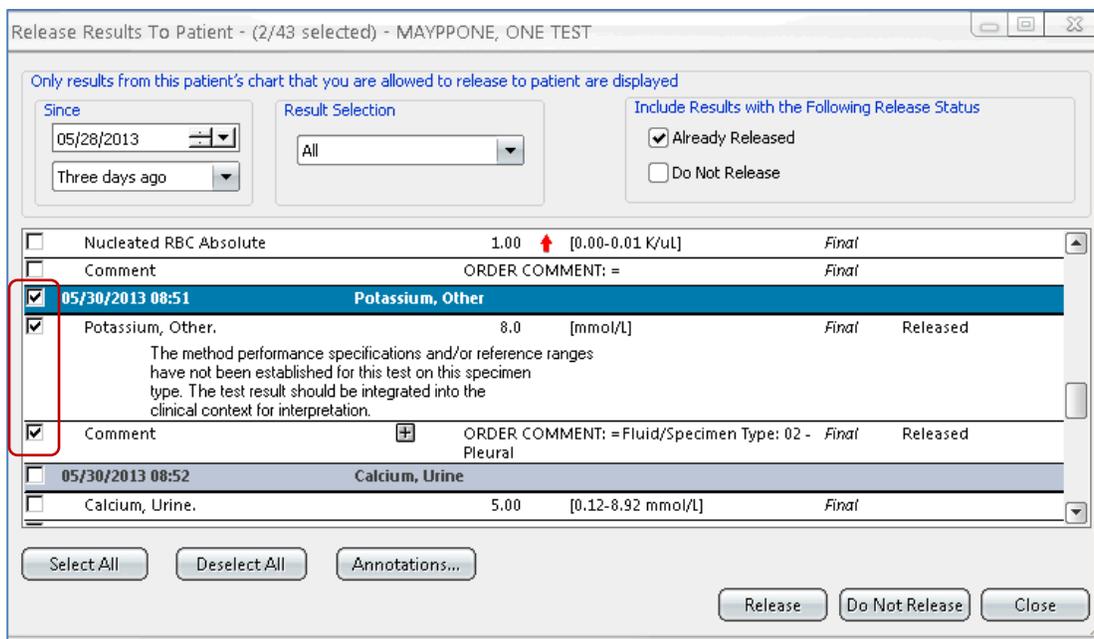
g. How to Recall Results From the Portal:

*Results that have already been sent to the Portal may be subsequently removed/recalled from the Portal and made unavailable to the patient.*

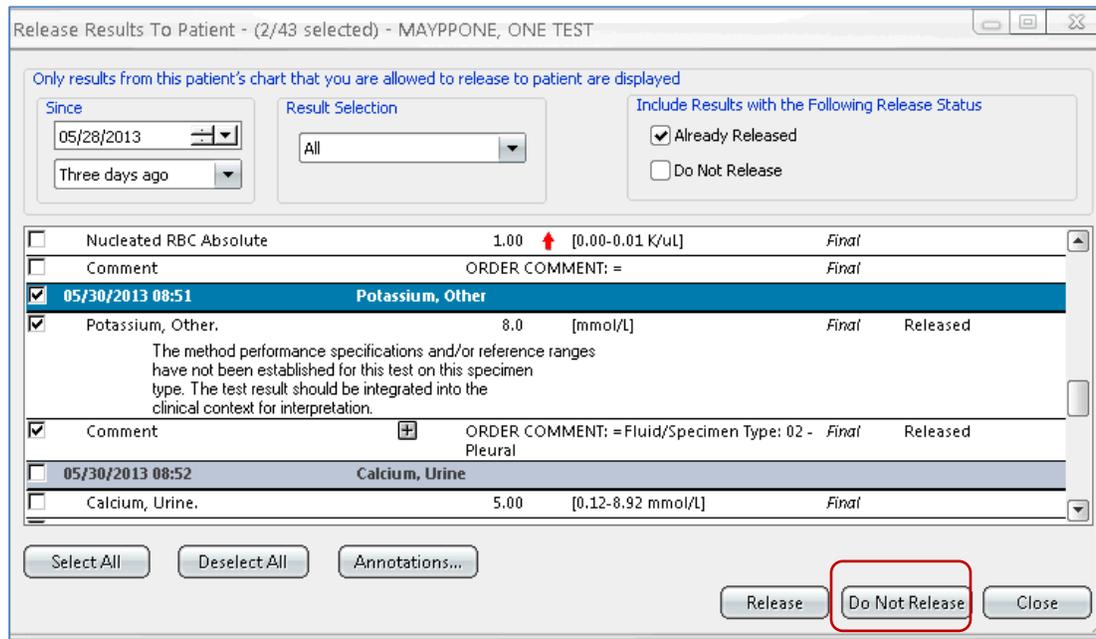
1. From the **Release Results to Patient** dialogue window, select the **Already Released** checkbox. This will display test item results that have already been released to the Portal.



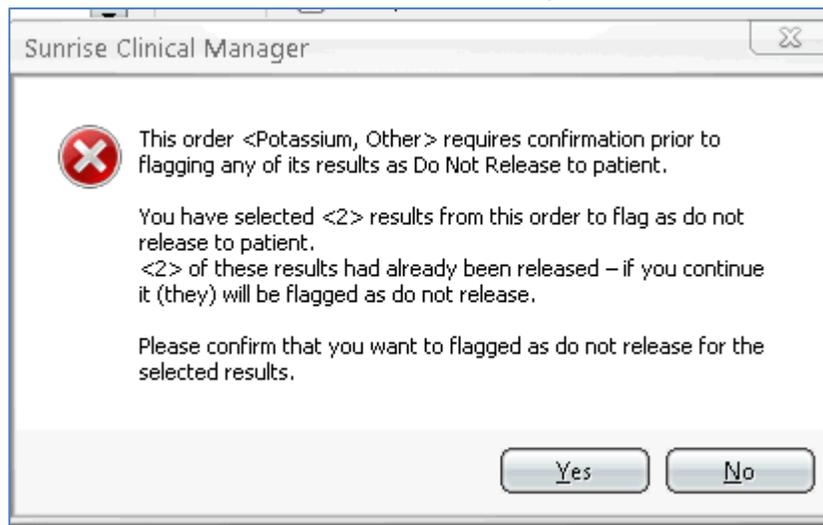
2. Select the desired results by selecting the appropriate checkbox.



3. Select the **Do Not Release** button.



4. A confirmation alert window will display. Click **Yes**.



5. The test result has now been removed from the Portal. The test result will now display on the **Do Not Release** list.

Release Results To Patient - (0/40 selected) - MAYPPONE, ONE TEST

Only results from this patient's chart that you are allowed to release to patient are displayed

Since: 05/28/2013  
Three days ago

Result Selection: All

Include Results with the Following Release Status:  
 Already Released  
 Do Not Release

<input type="checkbox"/>	Comment	ORDER COMMENT: = .	Final	Do Not Release
<input type="checkbox"/>	05/30/2013 08:51	Potassium, Other		
<input type="checkbox"/>	Potassium, Other.	8.0 [mmol/L]	Final	Do Not Release
	The method performance specifications and/or reference ranges have not been established for this test on this specimen type. The test result should be integrated into the clinical context for interpretation.			
<input type="checkbox"/>	Comment	ORDER COMMENT: = Fluid/Specimen Type: 02 - Pleural	Final	Do Not Release
<input type="checkbox"/>	05/30/2013 08:52	Calcium, Urine		
<input type="checkbox"/>	Calcium, Urine.	5.00 [0.12-8.92 mmol/L]	Final	
<input type="checkbox"/>	Comment	ORDER COMMENT: =	Final	

Select All Deselect All Annotations...

Release Do Not Release Close

## II. Documents:

- a. Selected documents are automatically released from CRIS to the Patient Portal. Only documents with a **Status** of **Complete** will be released to the Portal. They include: Inpatient Discharge Summaries; Patient Discharge Instructions; and Outpatient First Registration Reports.
- b. In order to be able to determine which documents have been released to the portal, use the below filter settings on the **Documents** tab in CRIS.

1. With the desired patient selected, go to the **Documents** tab.

**JUNEPTTHREE\_THREE TEST** 85-27-03-9 / 131807207760  
CRC-3SE-N Chief Complaint: ALLERGIC RHINITIS Protocol: 02-CC-0266 Falls: 0 Adegbulugbe, Ademiposi A  
Allergies: Cannot Obtain Allergy Status

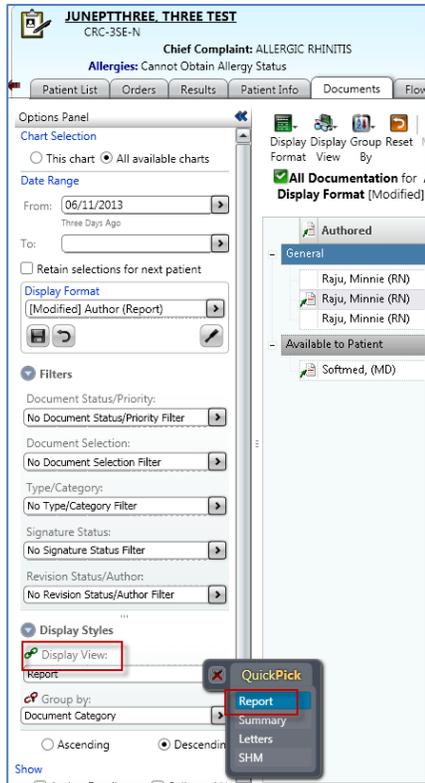
Documents

Options Panel  
Chart Selection  
Date Range  
From: 06/11/2013  
To: [Three Days Ago]  
Display Format: (Modified) Author (Report)  
Filters  
Document Status/Priority: No Document Status/Priority Filter  
Document Selection: No Document Selection Filter  
Type/Category: No Type/Category Filter  
Signature Status: No Signature Status Filter  
Revision Status/Author: No Revision Status/Author Filter  
Display Styles  
Display View: Report  
Group by: Document Category  
Ascending Descending

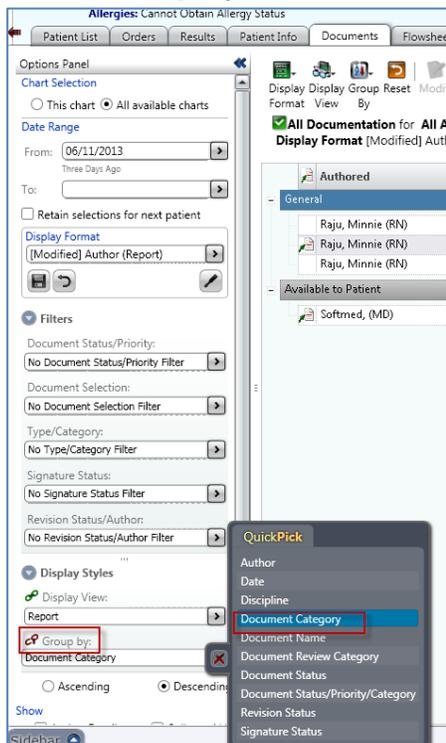
Display Documentation for All Available Charts for Document dates from 06/11/2013 to Unspecified  
Display Format [Modified] Author (Report); Group by: Document Category

Author	Document Name	Document	Time	Signed
- General				
Raju, Minnie (RN)	Bereavement Intake Progress Note	Complete	02:10	06/13/2013 02:10
Raju, Minnie (RN)	PPC Followup Progress Note	Complete	14:13	06/11/2013 14:18
Raju, Minnie (RN)	PPC Initial Consult Note	Complete	13:55	06/11/2013 14:12
- Available to Patient				
Softmed, (MD)	Discharge Summary	Complete	00:00	

2. In the **Display View** filter, select **Report**.



3. In the **Group by** filter, select **Document Category**.



4. All documents that may be available to the patient in the Patient Portal are displayed in the **Available to Patient** category. However, the document must have a status of COMPLETE in CRIS to actually display in the Portal.

The screenshot shows a medical software interface for patient 'JUNEPHTHREE, THREE TEST'. The patient's chief complaint is ALLERGIC RHINITIS, and the protocol is 02-CC-0266. The interface includes a navigation bar with tabs like Patient List, Orders, Results, Patient Info, Documents, etc. On the left, there is an 'Options Panel' with 'Chart Selection' set to 'All available charts' and a 'Date Range' from 06/11/2013. The 'Display Format' is set to '(Modified) Author (Report)'. Below this, there are 'Filters' for Document Status/Priority and Document Selection, both currently set to 'No Document Status/Priority Filter' and 'No Document Selection Filter' respectively.

The main area displays a table of documents. The table has columns for 'Authored', 'Document Name', 'Documen', 'Time', and 'Signed'. The documents listed are:

Authored	Document Name	Documen	Time	Signed
- General				
Raju, Minnie (RN)	Bereavement Intake Progress Note	Complete	02:10	06/13/2013 02:10
Raju, Minnie (RN)	PPC Followup Progress Note	Complete	14:13	06/11/2013 14:18
Raju, Minnie (RN)	PPC Initial Consult Note	Complete	13:55	06/11/2013 14:12
- Available to Patient				
Softned, (MD)	Discharge Summary	Complete	00:00	

A red box highlights the 'Available to Patient' filter, and a red arrow points to the 'Discharge Summary' document.