Beneficiary Onboarding and Ongoing Usage Training
RelayHealth Personal Health Record (PHR) through
Minnesota Department of Human Services

Overview:
Thank you for participating in the initial demonstration rollout of the RelayHealth Personal Health Record (PHR)! We appreciate your willingness to help us apply technology for the benefit of recipients of LTSS services from Minnesota Department of Human Services (DHS).

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

The section footers in this document identify:

- Beneficiary One-Time Registration – for a Beneficiary using the PHR on his/her own behalf
- Beneficiary Ongoing PHR Usage - for a Beneficiary using the PHR on his/her own behalf

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 Beneficiary of Long-Term Services and Supports (LTSS) who will use the RelayHealth PHR on his/her own behalf. This is a one-time process that does not need to be repeated. The Beneficiary 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 Beneficiary clicks on the REGISTER link to begin registration.
Beneficiary clicks “This is for me”
Beneficiary clicks “Register Me”. In this illustration, “Beneficiary” is the beneficiary’s first name.
Beneficiary enters his/her Birth Date to verify identity. Contact the Otter Tail County Case Manager if an error message is displayed. This means that the Birth Date entered does not match with Department of Human Services records.
Do not change the information on this screen. If it is not correct, contact the Case Manager. If necessary, the Case Manager will make the changes at the Department of Human Services.

Beneficiary clicks confirmation of Terms of Use and Privacy Policy, then clicks NEXT.
Beneficiary clicks NEXT to continue with registration.
Beneficiary confirms User Name and creates a Password. User name defaults to email address; although it can be changed as desired by the Beneficiary, we recommend using email address to minimize possible confusion.
Beneficiary selects security questions and enters answers to be used to validate identity if Beneficiary forgets Username and/or Password. Beneficiary clicks LOGIN to complete the registration process.
Beneficiary’s PHR Home page is displayed. The remaining pages will explain the major functions in the RelayHealth PHR portal.
Now that registration is complete, click on MESSAGES in the gray area to see the Beneficiary’s automatic “getting started” message within the PHR. The Beneficiary’s ongoing use of the PHR is explained in the next section of this document.
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This is a sample of the message that the beneficiary receives in his/her email when the registration process is complete.
This section explains how a Beneficiary can use the RelayHealth PHR when registration is complete. A Beneficiary will have his/her own account with no other family members.

Usage by a legal or other designated representative using the PHR on behalf of a beneficiary is explained in a different document.

The Beneficiary logs in with the Username and Password that he/she set up in the registration process.
This is the main screen for the RelayHealth Personal Health Record (PHR).
As noted previously, a beneficiary will have his/her own account with no other family members.

To illustrate this, click on HEALTH RECORDS, then MANAGE FAMILY MEMBERS to get the next screen.
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This shows the Beneficiary as the ACCOUNT HOLDER. A Beneficiary acting on his/her own behalf will not see additional family members.
MESSAGES: These are similar in concept to email, however they exist completely within the PHR.

Click on MESSAGES, then click on a message to display it in the viewing pane.
Q: How to know there is a new message, for example 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 Beneficiary’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 in order to ensure that the Beneficiary’s privacy is protected.
Click on the REPLY icon to reply to a message.
Enter REPLY message text, then click SEND.
Confirmation that message was sent. Click CLOSE to return to messages.
Click SENT to show message in SENT items.
Click COMPOSE to create a new message. Select the PROVIDER from the dropdown list.
This screen displays when PROVIDER is selected. Click YES, I UNDERSTAND to proceed.
Select SUBJECT type from the dropdown list.
Enter message text, then click SEND.
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Confirmation that message was sent.
Message in SENT items.

From: Beneficiary Ottetaill-o
To: MN Department of Human Services - Otter Tail

Note to Office

This is a sample message to Otter Tail County.
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Click if desired to change how messages are sorted in this view.
Click on this icon to ARCHIVE the message to remove it from this view if desired. Note that messages can be saved as “archive” but they are never deleted from the RelayHealth PHR.
PROVIDERS:

Click on PROVIDERS to see this screen, which lists all provider organizations contributing to the Beneficiary’s Personal Health Record. Click on PRIVACY PREFERENCES to get the next screen.

![Screen shot of RelayHealth interface with list of providers]

- **Beneficiary Ottertail-O’s Providers**
  - **Provider or Facility**: MN Department of Human Services - Otter Tail
    - Status: Approved
    - Privacy Preferences: Public - Public
    - Remove
  - **Provider or Facility**: ML Jody Lien CCM
    - Status: Approved
    - Privacy Preferences: Public - Public
    - Remove
Privacy Preferences: The first setting identifies whether or not your other providers or staff can see that there is a relationship with this provider or organization. The second setting identifies whether your 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 your 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 beneficiary uploads any document to the PHR, any of your 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 provider organization name, then click SEARCH. Zip code also can be used if desired but is not required. The example below shows a search for Lake Region Healthcare.
Click SELECT for desired Provider organization. Note that since zip code was left blank in this search, other organizations containing “Lake Region” in their names that are outside the local area also are displayed. This is because the RelayHealth Personal Health Record is a portal with other client organizations nationwide.
The added provider now shows in the list. Note that STATUS is PENDING confirmation by the Provider organization.
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.
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This screen shows how Medications and Allergies appear. Click ADD to enter new entries. Click on the other sections of HEALTH RECORDS to get similar views.
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Click DOCUMENTS to get the next screen.
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This is a list DOCUMENTS. The first example shown (DHS Profile Page) will be loaded automatically by the Department of Human Services. Other documents can be added (uploaded) by Beneficiaries. Click on VIEW within the dropdown box to view the document.
This is a sample of the new DHS Profile page.
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 Beneficiary’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 Beneficiary, as shown in SOURCE. Documents added by DHS and other Provider organizations are identified accordingly.
To add 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.
The new document now appears on the list, along with a confirmation that the document was added.
Click PRINT HEALTH RECORDS to view the entire record.

![Health Record Documents](image_url)
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 is helpful if the Beneficiary also adds (Uploads) these documents.
To update personal information (for example Living Will and Advanced Directive), click on HEALTH RECORDS, then click UPDATE PERSONAL INFORMATION.
Click on the desired section to add or edit information. Continuing the example from above, 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.
Update HEALTH CONSIDERATIONS below.
Click ACCOUNT to get the next screen.
This screen provides the ability to update basic account information, including user ID, password and security questions, and language preference. Currently, only English and Spanish are options for language. 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.
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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.