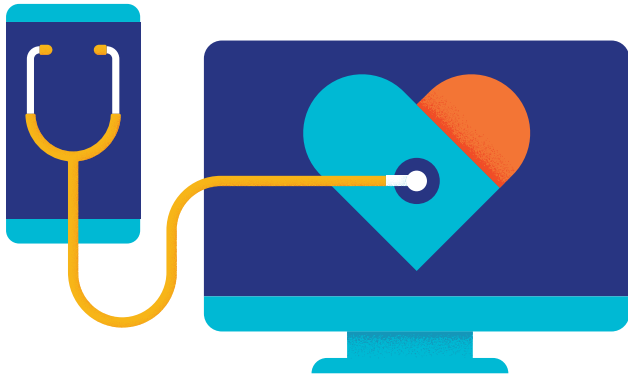# Get the right data, right now

Individual Health Record™ User Guide

United
Healthcare

The Individual Health Record (IHR)

The Individual Health Record (IHR) is a technology platform that provides a robust digital record of a person's UnitedHealthcare health care history.

IHR takes data from across systems and transforms it into a record that communicates each person's health history and current health status.

This guide will walk you through:

Get a broader understanding of your UnitedHealthcare patients' overall health care experience, including improved:

Information

The platform delivers patient information across all patient encounters in the health care delivery system.

- Diverse data such as inpatient, outpatient, ambulatory, in-network, out-of-network and reported sources are combined into a single record.
- Gives you access to current and historical diagnoses, visits, medications, and tests from physicians outside your practice.

Coordination

Helps reduce unnecessary or duplicated tests and appointments as all clinical teams are working from the same patient information.

- Near real-time data is used in the IHR, helping decrease possible test duplication and increase the ability to monitor items, such as medication.
- Helps reduce the administrative burden for providers by automating the movement of data.

Care

Provides a broader view of your patients' overall health care experience. It will benefit care teams in several important ways:

- Makes the most of the patient's visit, potentially closing open gaps in care.
- Identifies potential admission/readmission risks early, allowing the provider to take preventive measures.

User Notes

IHR is a patient-level record, not a population health tool.

The IHR reflects data available to UHC at a point in time, and may not reflect all data that is available.

The IHR looks at gaps in care broadly against patient information. It does not calculate official HEDIS gaps in care. Patient Care Opportunity Report (PCOR) continues to be the source of truth for UHC HEDIS gaps in care. Patient data may be limited by patient imposed restrictions or SDC restrictions.

How to find your patient's records

Select the tab at the top of the screen called Patient Search.

The system presents a search screen with two search options. **Established Patient** or **New Patient**. There are two distinct searching options. If you have seen the patient before, use the **Established Patient** option. If not, then use **New Patient** option. The requirements are different for each.

Want to search for an established patient?

1. Use the **Established Patient** search function from the **Patient Search** tab to locate a patient by **Name** or **Identifier** and **Birthdate**.

2. When you have entered all of the required data, click **Search** to display a list of possible matches. The more fields you complete, the faster and more accurately the system responds.

Q Patient Search

◉ Established Patient ○ New Patient

| Name* | Identifier* | Birthdate* 📅 | Gender ▾ |

Search

Name/Identifier*
Enter first name then last name **OR** an accepted identification number. Acceptable identifiers include Medicare or Medicaid ID, Healthcard ID or Subscriber ID.

Birthdate*
Always enter date (mm/dd/yyyy) or use the calendar icon.

Gender
Male, Female and Unknown. This field is "not" required for accessing an established patient.

Once you have entered the required data for your established patient search, the system will display the result of your efforts.

Simply select the desired patient name on the left, and the system will display the patient's summary.

Q Patient Search

◉ Established Patient ○ New Patient

| Name*
Mickey Mouse | Identifier | Birthdate*
04/22/1941 📅 | Gender ▾ |

Search

Clear Results

Name	Gender	Birthdate	Age	Address	Relationship to Individual
mouse, mickey L	MALE	Apr 22, 1941	79 years	1243 RUSSELL ST YPSILANTI MI 48198-5970	

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*Denotes required field

Want to search for a new patient?

New patient searching has only three fields, however, all three are required. When a patient is identified, and the system determines no relationship exists between you and the patient, you will be prompted to create one before accessing the patient's record.

Q Patient Search

○ Established Patient ◉ New Patient

| Name* | Identifier* | Birthdate* 📅 |

Search

Name/Identifier*
Enter first name then last name **OR** an accepted identification number. Acceptable identifiers include Medicare or Medicaid ID, Healthcard ID or Subscriber ID.

Birthdate*
Always enter date (mm/dd/yyyy) or use the calendar icon.

You will be required to designate your relationship role.

1. Designate your **Relationship Role** with this patient from the drop-down list in the first field.
2. Enter the **Effective Date**. The effective date defaults to "today".
3. Enter the **Effective End Date.** The end date defaults to 2 years in the future.
4. Using the **Submit** button, the system will display the patient summary.

Create Relationship ✕

In order to view this patient's data, you will need to create a relationship to Minnie Mouse

| Relationship Role ▼ | Effective Date* 📅 | End Date* 📅 |

Submit Cancel

Got too many matches on a common name?
The **Birthdate** and **Age** fields are there to help you differentiate between patients.
Enter the first name then last name **OR** an accepted identification number.

*Denotes required field

The Patient Summary tab in the IHR provides a single, unified picture of an individual's health information, gathered from a variety of sources

Near Real-time Updates

Displays patient's most pertinent and current health care information available.

Unique Care Insights

Support the clinician's decision-making process by providing a longitudinal view of the individual's health.

Combines Health Records

Aggregates data so that clinicians can see the health status which is updated daily, in order to make timely and evidence-based decisions.
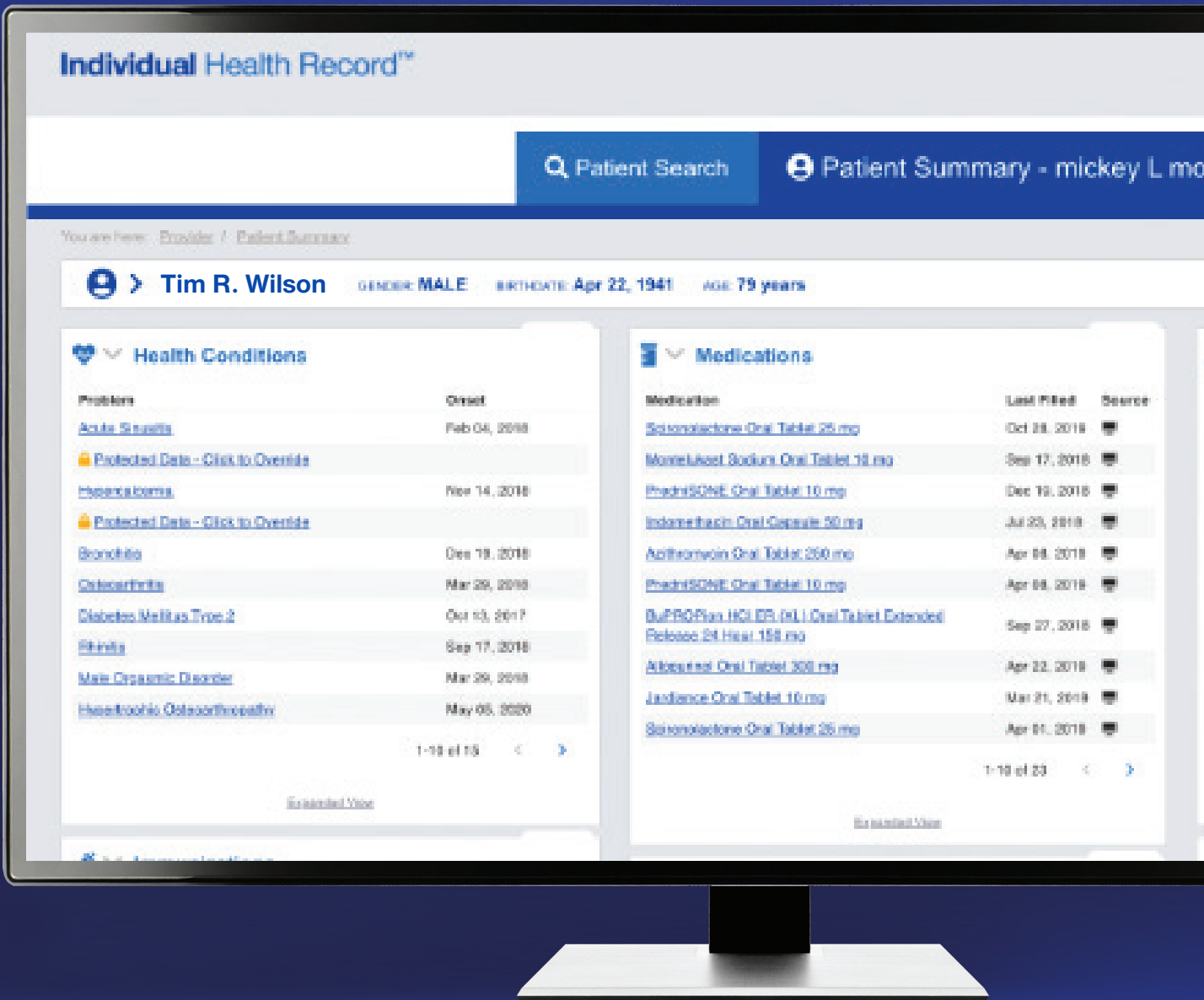
The Patient Summary

The IHR is organized through a series of portlets to meet your specific needs. This section contains descriptions of portlets columns, fields and explanations of the data found in the portlets. Demographics in the patient banner will be described first, followed by portlet descriptions. Filtering and other navigation hints are provided in context.

How the IHR sources data

The IHR pulls in data from several different sources to create a picture of the patient's health, so you can easily determine the source of the data.

The IHR Patient Summary

The IHR Patient Summary effectively summarizes all of the important data about the patient in one, easy-to-read format. It is designed to help clinicians easily navigate through a patient record by providing an overview of the patient's health status.

The Summary displays mini "portlets" clearly labeled so you can navigate directly to the areas of interest or concern. You are able to click the link on the items and drill down into the health item's details or expand the view and see more items summarized in that portlet. The patient name, age, DOB and gender remain visible no matter where you navigate.

More information is available on the following pages.

Some portlets such as Medications and Visit Activity show the Data Source Type on the Patient Summary.

Hover over the computer icon to see what the data source is. Currently, the system displays "interface" in the hover, however, more source icons are being added based on new data sources.

Example Data Sources:

• Medical Claims – Claims Highway

• Pharmacy Claims – OptumRx

Data considered sensitive will be protected

Role-Based Criteria

An important aspect of the IHR sensitive data conditions functionality is that it is role-based. That is, different criteria are applied based on the security role assigned to the person accessing the data, ensuring that sensitive information is viewed only by authorized users.

Protected Data Levels

Related data is grouped into levels in order to apply the appropriate protective behaviors to the group. For example, the Communicable Diseases sensitive data class contains not only the conditions defined as communicable diseases but also the medications and procedures specifically used to treat those diseases.

How to override data protections, if needed.

The IHR may allow for override of the data protection for certain categories of sensitive information. Override is allowed when a clinician agrees to a disclaimer and provides a reason.

🔒 Protected Data - Click to Override

🔒 **Protected Data Override**   ✕

Disclosure of information pursuant to this selection will allow you to see the patient's protected information, if present, pertaining to the following conditions: HIV/AIDS, STD tests, genetic information, mental health, and child/domestic abuse. You hereby represent that you have obtained a valid and lawful written authorization from your patient sufficient to authorize you to receive this information from UnitedHealthcare under either or both state and federal laws, as applicable. Substance use disorder patient records from drug and alcohol abuse programs will not be disclosed.

✱ Reason

○ No authorization has been obtained, but I attest that protected information is needed to treat the patient's medical emergency as permitted under select state and federal law and that prior informed consent cannot be obtained. Please record the nature of the emergency in your records.

○ Patient has provided a valid and lawful authorization for UnitedHealthcare to disclose to you all protected informa

[Submit] [Cancel]

1. Click the **Override** icon.

2. Read the disclaimer displayed over the drop-down choices.

3. Select a reason for override from the drop-down. If you agree, click **Submit** on the right side of the screen.
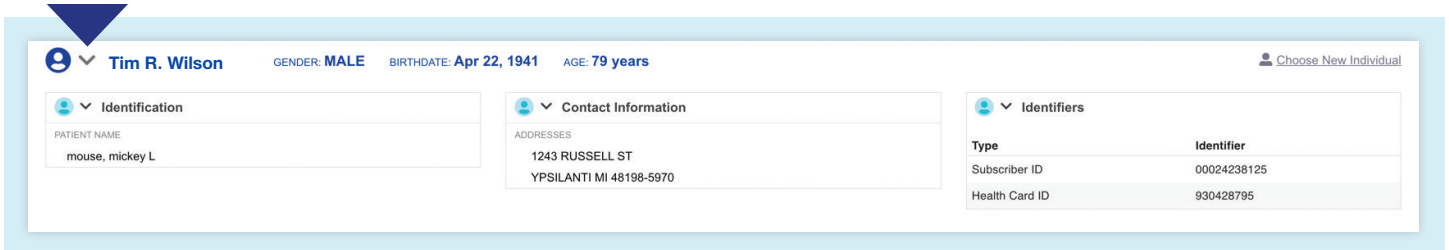
You will return to the **Patient Summary** and the data you overrode will be unmasked. If there are multiple lines of sensitive data needed, you will need to repeat steps 1-4 above for each line.

Protected data types:

- Substance abuse information under the Confidentiality of Substance Use Disorder Patient Records*

- HIV/AIDS

- STD tests and communicable diseases

- Genetic information

- Mental health

- Child/domestic abuse

Reasons for Override:

- No authorization has been obtained, but I attest that protected information is needed to treat the patient's medical emergency as permitted under select state and federal law and that prior informed consent cannot be obtained. Please record the nature of the emergency in your records.

- Patient has provided a valid and lawful authorization for UnitedHealthcare to disclose to your provider all protected information.

*Confidentiality of Substance Use Disorder Patient Records, 42 C.F.R. §2

How to find patient demographics

Basic patient information can be found in the banner across the top of the screen.

Additional demographic information such as contact information and identifiers can be found by selecting the twisty at the top of the screen under the patient's name.

Health Conditions Portlet

Displays disease and injury related conditions from available sources based on the most reliable information received.

The diseases that are considered especially sensitive (SDC's) are hidden from view and display a small lock with the words "Protected Data – Click to Override".

Only users with proper security will be presented with the option to override and view the sensitive data. Users without elevated security will see the lock and only the words "Protected data". The mini portlets display up to 10 most recently updated conditions. Expanded view link at the bottom provides users the ability to see all of the conditions associated to the patient, as well as supporting an expanded view of the conditions list.

How the IHR sources data

The IHR pulls in data from several different sources to create a picture of the patient's health, so you can determine the source of the data.

Some portlets such as conditions and medications display an icon showing the source of the data. Currently only interface is enabled, but as new sources become available, more source types will display.

Want to see more conditions?

Select the **Expanded View** link at the bottom of the mini portlet. The Expanded View is available consistently on all mini portlets and provides you with the ability to enter a search term to more quickly find what you are looking for.

Simply enter the term in the **Find** field and the system will search all of the patient's conditions and return those that match your entry. Each of the "Expanded view" portlets have this feature.

Want to see the conditions' details?

Selecting the condition hyperlink from the extended view **OR** from the mini portlet to see the details related to the condition you selected. Additional information such as code source, provider name, related procedures or medications that contributed to the condition information will display when available.

Immunizations Portlet

Displays a list of immunization procedures and the drug(s) administered.
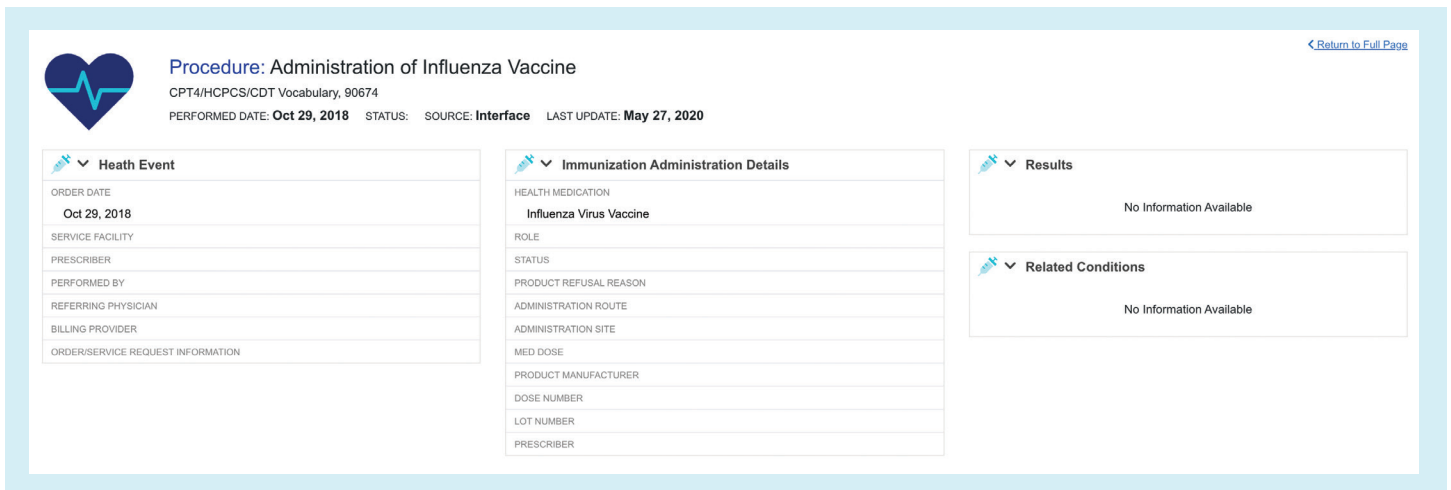

Want to see more immunizations?

Click **Expanded View** in the lower right corner.

Want to see the details?

Select the immunization hyperlink from the extended view **OR** from the mini portlet to see the details related to the immunization you selected. Additional information such as code source, provider name, related procedures or medications that contributed to the condition information will display when available.

Medications Portlet

Displays a list of the patient's medication(s). The list includes prescribed and over the counter medications if provided. This portlet reflects both current and historical medications ordered and/or filled by the individual. It can serve as a resource for reviewing recently added medications. Additionally, dosage and ordering information are displayed when available.

How the IHR sources data

The IHR pulls in data from several different sources to create a picture of the patient's health, so you can easily determine the source of the data.

Want to see more medications?

Clicking **Expanded View** provides additional summary information about the Medications and allows the display of all of the items available. The search filter is available for quick access.

Want to see the details?

Click on the hyperlinked medication to see additional information such as dosing details as well as other significant information about the medication.

Tests/Exams/Assessments Portlet

Displays a list of the patient's health events such as tests, examinations, and assessments.

Tests/Exams/Assessments

Procedure	Start Date	Indicator
Urine Culture	Jan 04, 2018	
Alanine Aminotransferase (ALT) in Blood	Mar 19, 2019	Abnormal High
Microalbumin Assay in 24 Hour Urine	Sep 28, 2018	
Microalbumin/Creatinine Ratio in Urine	Sep 28, 2018	
Gamma Glutamyl Transferase (GGT) Assay in Blood	Mar 19, 2019	Abnormal High
Glucose Assay in Blood by Glucose Meter	Jun 21, 2018	
Hemoglobin A1c Assay in Blood	Jun 21, 2018	
Hemoglobin A1c Assay in Blood	Mar 08, 2019	
Glucose Assay in Blood by Glucose Meter	Nov 18, 2019	
Hemoglobin A1c Assay in Blood	Nov 18, 2019	

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Expanded View

Want to see more procedures?

Click **Expanded View** in the middle of the mini portlet. The expanded view provides additional summary information about the tests/exams and allows the display of all of the items available. The search filter is available for quick access.

Want to see the details?

Select one of the procedure hyperlinks on the mini portlet or the expanded view and the system presents the detail screen. The detail screen provides all of the information about the test/examination or assessment as provided to the IHR. The results display when available.

Return to Full Page

Procedure: Lipid Profile in Blood
LCA Procedure Foreign Key, 303756
PERFORMED DATE: **Jan 25, 2018**   STATUS: **Completed**   LAST UPDATE: **May 27, 2020**   SOURCE: **Interface**

Health Event

SERVICING FACILITY

ORDER DATE
Jan 25, 2018

Results

Observation	Value	Indicator	Ref Range
Cholesterol Measurement - Blood	163 Milligram per Deciliter		100 - 199
Triglyceride Measurement - Blood	117 Milligram per Deciliter		0 - 149
HDL Cholesterol Measurement - Blood	60 Milligram per Deciliter		0 - 0
VLDL Cholesterol Measurement by Calculation - Blood	23 Milligram per Deciliter		5 - 40
LDL Cholesterol Measurement by Calculation - Blood	80 Milligram per Deciliter		0 - 99

Related Visits
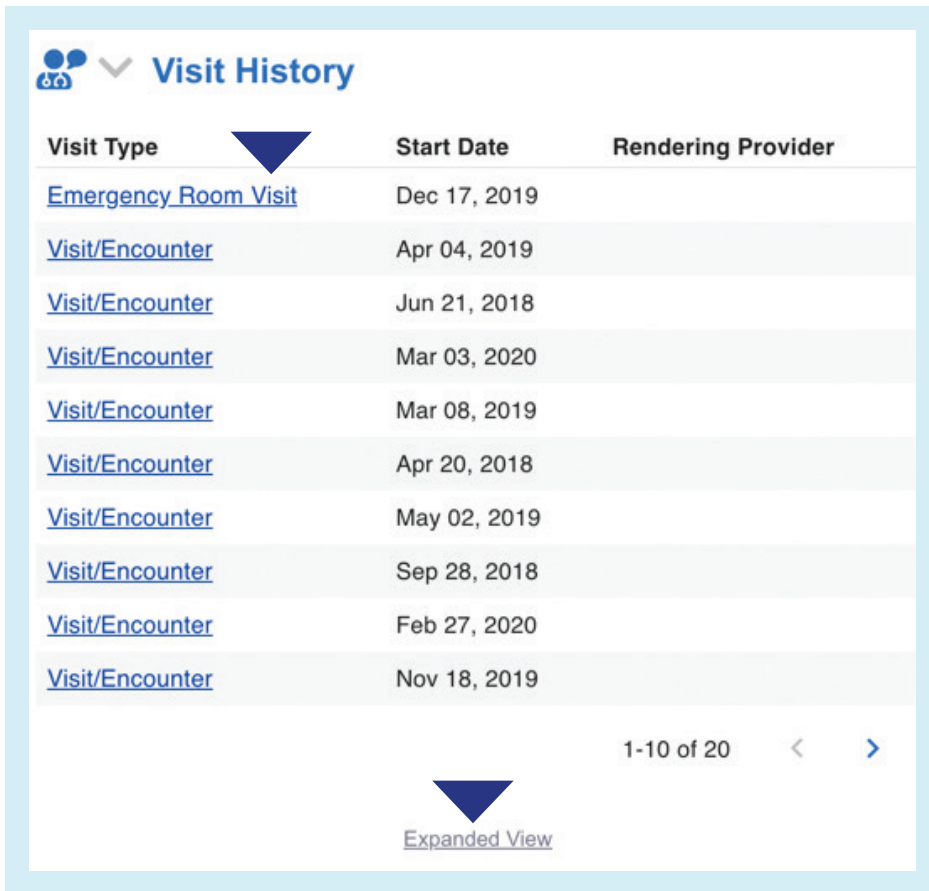
No Information Available

Related Medications

No Information Available

Related Conditions

No Information Available

Visit History Portlet

Displays a list of patient visits in reverse chronological order. Up to 10 visits display on the mini portlet and include the date, and rendering provider name if available.

Visit History

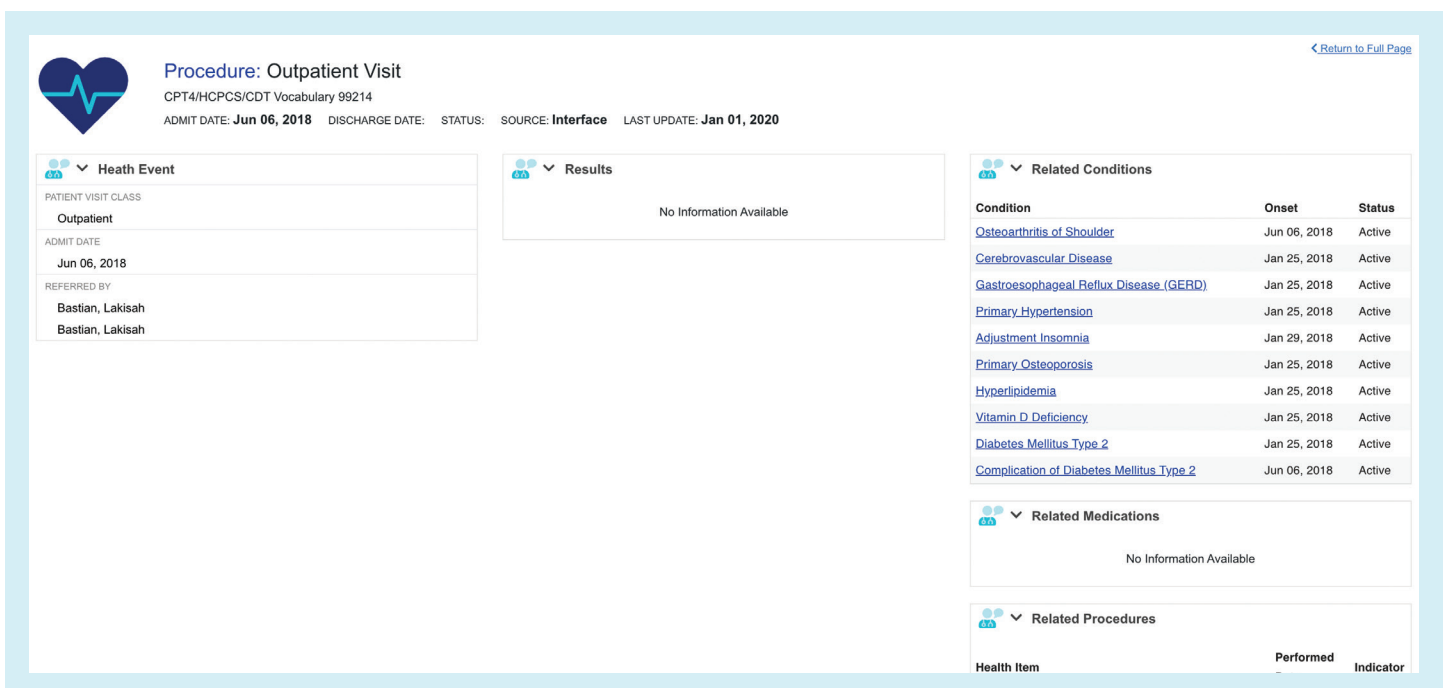| Visit Type ▼	Start Date	Rendering Provider
Emergency Room Visit	Dec 17, 2019	
Visit/Encounter	Apr 04, 2019	
Visit/Encounter	Jun 21, 2018	
Visit/Encounter	Mar 03, 2020	
Visit/Encounter	Mar 08, 2019	
Visit/Encounter	Apr 20, 2018	
Visit/Encounter	May 02, 2019	
Visit/Encounter	Sep 28, 2018	
Visit/Encounter	Feb 27, 2020	
Visit/Encounter	Nov 18, 2019	

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Expanded View

Want to see more Visits?

Click the **Expanded View** link at the bottom of the portlet.

Want to see the details?

Select one of the visit hyperlinks on the mini portlet or the expanded view and the system presents the detail screen.

‹ Return to Full Page

Procedure: Outpatient Visit
CPT4/HCPCS/CDT Vocabulary 99214
ADMIT DATE: **Jun 06, 2018**   DISCHARGE DATE: STATUS: SOURCE: **Interface**   LAST UPDATE: **Jan 01, 2020**

⌄ Heath Event

PATIENT VISIT CLASS
Outpatient

ADMIT DATE
Jun 06, 2018

REFERRED BY
Bastian, Lakisah
Bastian, Lakisah

⌄ Results

No Information Available

⌄ Related Conditions

Condition	Onset	Status
Osteoarthritis of Shoulder	Jun 06, 2018	Active
Cerebrovascular Disease	Jan 25, 2018	Active
Gastroesophageal Reflux Disease (GERD)	Jan 25, 2018	Active
Primary Hypertension	Jan 25, 2018	Active
Adjustment Insomnia	Jan 29, 2018	Active
Primary Osteoporosis	Jan 25, 2018	Active
Hyperlipidemia	Jan 25, 2018	Active
Vitamin D Deficiency	Jan 25, 2018	Active
Diabetes Mellitus Type 2	Jan 25, 2018	Active
Complication of Diabetes Mellitus Type 2	Jun 06, 2018	Active

⌄ Related Medications

No Information Available

⌄ Related Procedures

Health Item	Performed	Indicator

Surgical History Portlet

Displays a list of patients with more "invasive" procedures. Up to 10 procedures display on the mini portlet and include the date if available.

Want to see more procedures?

Click the **Expanded View** link at the bottom of the portlet.

Want to see the details?

Select one of the visit hyperlinks on the mini portlet or the expanded view and the system presents the detail screen.

Care Team - Organizations Portlet

Displays a list of organizations involved in the delivery of care of a patient.
Up to 10 organizations will display in the mini portlet.

Care Team - Organizations

Name	Role
Publix Super Markets Inc	Medication Product Supplier
Optum Pharmacy 702, Llc	Medication Product Supplier
Digestive Healthcare Of Georgia Endoscopy Center	Service Provider Organization
Walgreen Co	Medication Product Supplier
Optumrx, Inc.	Medication Product Supplier
Laboratory Corporation Of America Holdings	Service Provider Organization
Optum Pharmacy 703, Llc	Medication Product Supplier
The Kroger Co	Medication Product Supplier
Fayette Community Hospital, Inc.	Service Provider Organization
Laboratory Corporation Of America Holdings	Service Provider Organization

Expanded View

Want to see more organizations?

Selecting **Expanded View** at the bottom will display all of the provider organizations associated with the patient. Unlike the clinical portlets, there is no need for a search field on the Care Team portlets. Choosing the organization name, the system displays all further details available about the organization.

Want to see the details?

Click on the organization to see additional information such as the business contact information.

Name: New Orleans Physician Services Inc

‹ Return to Full Page

Organization Information

NAME
New Orleans Physician Services Inc
ROLE
Service Provider Organization
EFFECTIVE DATE
Jan 29, 2018
SPECIALTY
LAST UPDATE

Contact Information

Care Team - Practitioner's Portlet

Displays a list of practitioners that have been assigned to the individual.
The list includes the practitioner's name and specialty.

Name ▼	Specialty	Source
Mashman, Walter Edward	Cardiology, Internal Medicine	🖥
Bailey, Cheril M		🖥
Harvey, Kyra		🖥
Harrell, Robert Kevin	Pathology, Clinical & Anatomic Pathology	🖥
Gilligan, Jennifer Lyn		🖥
Dalton, Booker H	Gastroenterology, Internal Medicine	🖥
Mclogan, Katherine Anne		🖥
Powell, David R		🖥
Smith, Ellison		🖥
Dillon, Tracy Eugene		🖥

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Expanded View

Want to see more practitioners?

Select **Expanded View** if there are more than 10 practitioners. The system will present a list of "all" known practitioners.

Want to see the details?

Click on the practitioner to drill down to the next level and see additional information such as role.

‹ Return to Full Page

Name: Rodriguez Fierro, Carlos O

Practitioner Information

NAME
Rodriguez Fierro, Carlos O

PRIMARY ROLE
Referring Provider

ALL ROLES
Referring Provider

EFFECTIVE DATE
Apr 26, 2018

CARETEAM.PRACTITIONER.ENDDATE.LABEL

NPI
1740289727

OCCUPATION
Physician

SPECIALTIES
Cardiology
Internal Medicine

LAST ACTIVITY DATE

Contact Information

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