Cerner HealtheLife Patient Portal Guide

Contents

Drafted by: MMG Training Team
Approval Date: 9.20.22
Update Date:

Overview of Cerner HealtheLife Patient Portal

What is the Cerner HealtheLife Patient Portal?

Cerner HealtheLife is a web-based patient portal that enables collaboration between patients and providers. The portal allows McLaren to give patients more self-service access to their clinical information and empowers them to become proactive members of their care team.

The CMS Quality Payment Incentive Program (QPP) also rewards our providers through a Merit-based Incentive Payment System (MIPS). Within MIPS, there is a Promoting Interoperability (PI) category. One of the requirements in the PI category is providing patients electronic access to their health information through the patient portal; HealtheLife

What are some of the Benefits of using the Cerner HealtheLife Patient Portal?

- Patients can email Refill Requests
- Patients can ask Questions via Secure Emails
- Improved Patient Communication
- Optimized Medical Office Workflow
- Decrease in Patient Phone Calls to the Clinic
- Increased Patient Ownership of Own Care
- Patients are more Informed
- Improved Patient Satisfaction
- Patients have 24/7 access to Records/Results
- Integrated directly into Cerner PowerChart

What can the patient see in their Cerner HealtheLife Patient Portal?

- Allergies
- Problems
- Procedures
- Medications
- Patient Information
- Health Profile
- Upcoming Appointments
- Immunizations
- Documents
- Messages
- Lab Results
- Radiology Results
- Visit Summary

Who is Responsible?

Everyone is responsible and should be promoting the usage of the patient portal.

Cerner HealtheLife Marketing Materials

The following marketing materials are available on the McLaren forms website and should be made available in all Cerner clinics:

**Note: The brochures include the Cerner HealtheLife Support Line phone number for patients.*

1. **Healthelife Bi-Fold Brochure:** MHCC- 501-2
2. **Healthelife Poster:** MM-307

The McLaren Medical Group Forms Committee regulates the various ways printing can be done on forms. Some forms have customizable options, others are preset. If the drop-down menu for printing options is locked, that form can only be printed in that specific format. If you would like to request a change to a form please email Kimberly Ross at Kimberly.r.ross@mclaren.org.

Form Details

Order ID	62203
Form Number	MHCC-501-2
Form Description	My McLaren Chart Brochure Bi-Fold
Form Location	0
Revision Date	6/2021
Misc Information	ds; bleed; bi-fold; scored and fold

Cerner HealtheLife Support Line

The Cerner HealtheLife marketing materials include the support phone number for patients to call. The Cerner HealtheLife Support Line is:

877-621-8014

Staff should be prepared to provide patients with this number if a patient is unable to login, needs a password reset, or is having any other technical difficulty.

It is always recommended to check if the patient's invite was sent successfully before advising them to call Cerner Support. See the ***Cerner HealtheLife Invite*** section in this guide for more information on how to check if an invite went out of the system successfully.

Cerner HealtheLife Eligibility

Who is eligible to enroll for the Cerner HealtheLife portal?

1. Any patients 18 years of age and up.
2. Any teen ages 13-17 years of age.

Authorized Representative

Definition: An individual who is requesting access to another patient's portal account.

Authorized Representatives are available for the following scenarios:

SECTION PENDING COMPLIANCE REVIEW***

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Cerner HealtheLife Authorized Representatives

Authorized Representative

Definition: An individual who is authorized to access another patient's portal account.

Authorized Representatives are available for the following scenarios:

SECTION PENDING COMPLIANCE REVIEW***

Overview of Cerner HealtheLife Patient Self-Enrollment

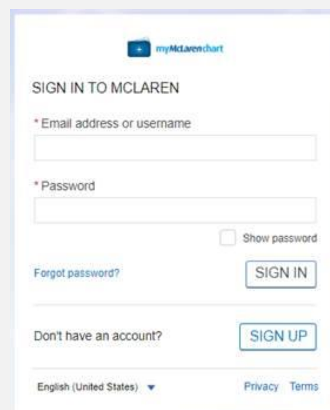
The self-enrollment feature is available for patients who are 13 years of age and older.

The patient will need to complete the first name, last name, and date of birth to start self-enrollment and would need to provide a unique patient identifier.

The following verification options are available as patient identifiers:

- MRN (Medical Record Number)
- Email address (*must have been previously provided and entered in the patient's chart in order to use email as a patient identifier*).

McLaren Sign-In Page



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Cerner HealtheLife Patient Self-Enrollment Workflow

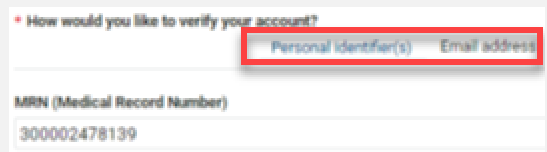
Since patients can choose to enroll with an MRN or an email, the steps to enroll are slightly different. See steps below:

Enrolling with MRN

1) Patient will access the **McLaren self-enrollment link** from the McLaren.org website.

2) After accessing the link, patient is presented with the following screen and is required to enter the following information:
   - First Name
   - Last Name
   - Date of Birth

3) Patient will indicate how they'd like to verify their account, either by MRN or email.
   - ***Note:*** *MRN is the default.*



4) Patient will complete identify verification and once complete, will click **Verify**.

5) If a patient match is found, patients are presented with the "Patient Match Found" window and are asked to:
   - Confirm they are the patient
   - Agree to the Terms of Use.

6) Patients will be prompted to create an account.
   a. First Name, Last Name, Gender, and Date of Birth are pre-populated.

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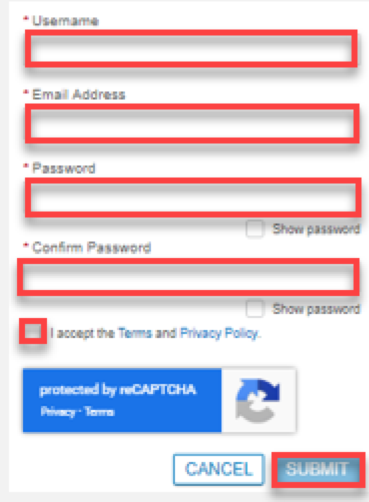
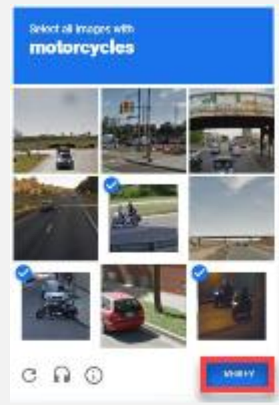
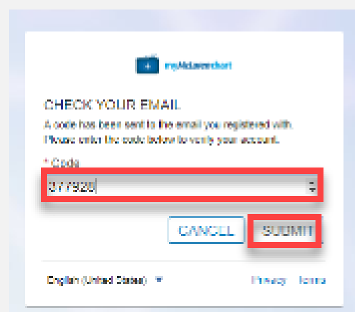
7) Patients will need to: a. Create a username b. Re-enter their email address c. Create a password • *Password must contain at least 1 number* • *Password must contain at least one capital letter* • *Password must contain at least one symbol* • *A secure password must be at least eight characters long* d. Re-enter password 8) Accept Terms of Use and Privacy Policy. 9) Select **Submit.**	
10) Patient will be asked to complete a reCAPTCHA question (select all the motorcycles, etc.). 11) Click **Verify** once complete.	
12) A **six-digit code** is sent to their email address. 13) Enter the **Code** and click **Submit**.	

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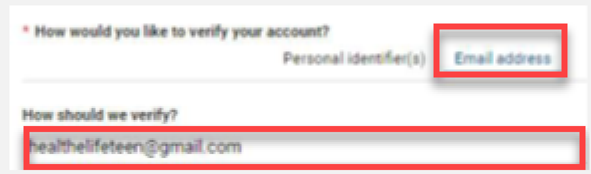
Enrolling with Email

1) Patient will access the **McLaren self-enrollment link** from the McLaren.org website.

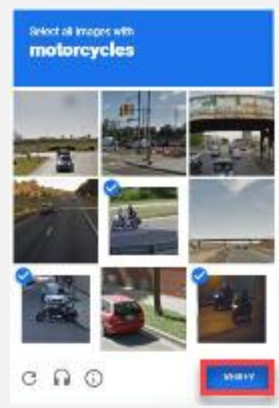
2) After accessing the link, patient is presented with the following screen and is required to enter the following information:
   a. First Name
   b. Last Name
   c. Date of Birth

3) Patient will select email and enter in their email.



4) Patient will be asked to complete a reCAPTCHA question.

5) Click **Verify** once complete.

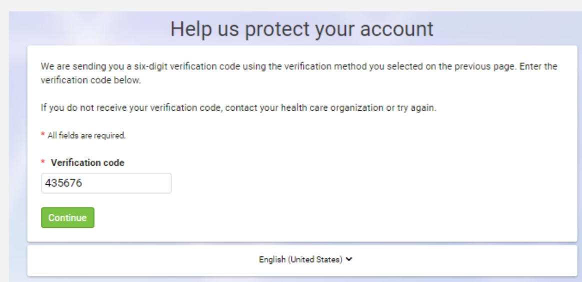


6) Patient will be presented with the "***Help us protect your account***" screen.

7) The system will send a six-digit code to the email address provided.

8) Patient will log into their email to retrieve the message/code.

9) Patient will enter the six-digit code and click Continue.



10) If a patient match is found, patients are presented with the "Patient Match Found" window and are asked to:
   a. Confirm they are the patient.
   b. Agree to the Terms of Use.

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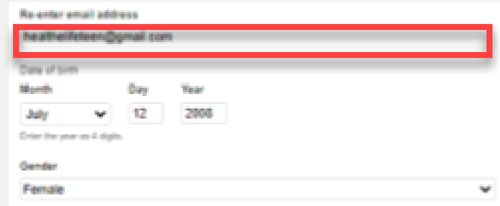
11) Patients will be prompted to create an account.

12) First Name, Last Name, Email Address, Gender, and Date of Birth are pre-populated.

13) Patient will re-enter their email address.



14) Patient will create:

a. Username

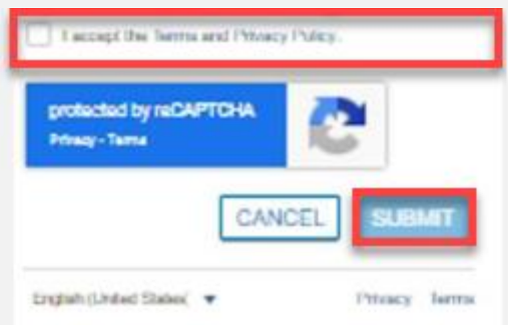
b. Password

- *Password must contain at least 1 number*
- *Password must contain at least one capital letter*
- *Password must contain at least one symbol*
- *A secure password must be at least eight characters long*

c. Re-enter Password

15) Accept Terms of Use and Privacy Policy.

16) Click **Submit**.



17) Patient is taken to the homepage of My McLaren Chart and an email notification is sent to the email address on file that an account was created online.

McLaren Online Enrollment to My McLaren Chart Confirmation

McLaren Health Care

Hello HEALTHELIFETEENTWO ZZTEST,

An account was created online with McLaren to access My McLaren Chart at July 12, 2022, 01:25 p.m. EDT. An account with My McLaren Chart allows users to view personal health information which is sensitive data.

If you created this account, you can disregard this email.

If you did not create this account, contact McLaren immediately.

Sincerely,
McLaren

Please do not reply to this message as this was sent from an unmonitored email inbox.

Reply Forward

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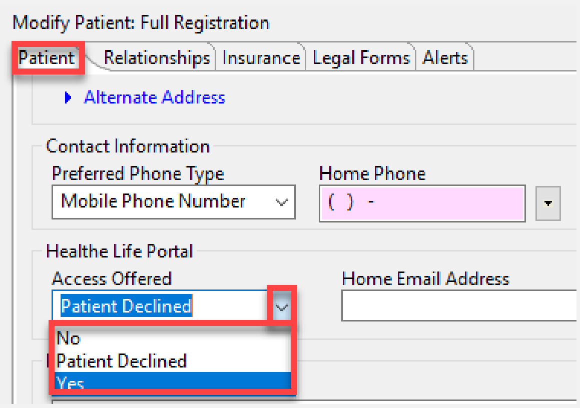
Invite the Patient to the Cerner HealtheLife Patient Portal

During the check-in process with patients, registration staff should ask the patient if they'd like to sign up for the Patient Portal. Please follow the steps below to send an invite during the check-in process if a patient expresses interest and it's not already signed up.

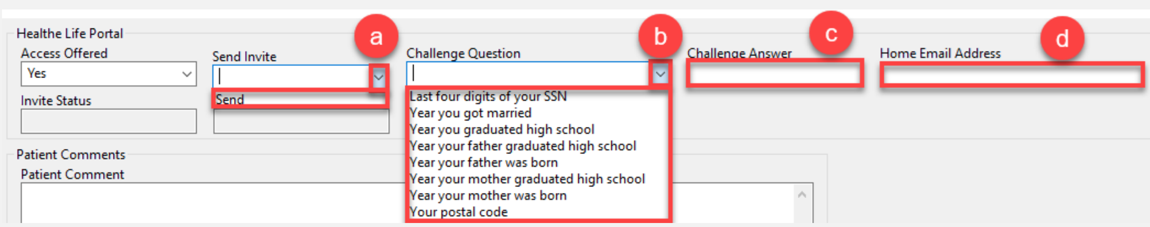
Send an Invite in Rev Cycle

1) On the **Patient** tab, scroll down to the **Healthe Life Portal** section.

2) Select the **Access Offered** dropdown and choose the appropriate option.
   a. **No:** if access to the portal was not offered to the patient.
   b. **Patient Declined:** if access was offered and the patient wasn't interested.
   c. **Yes:** if access was offered and the patient accepted. Additional fields will become required.



3) If **Yes** was selected, satisfy the remaining fields.
   a. **Send Invite:** Choose **Send** to send an invitation.
   b. **Challenge Question:** Choose the appropriate option.
   c. **Challenge Answer:** Free Text the answer to the Challenge Question that was chosen by the patient.
   d. **Home Email Address:** Enter and/or verify the patient's email address.

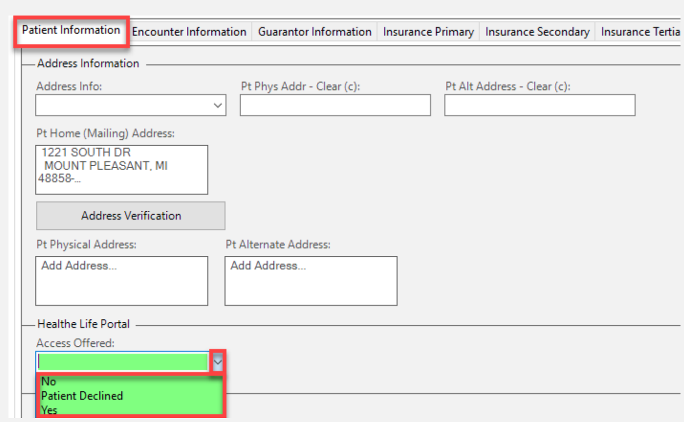


4) The registration process for the HealtheLife Portal is complete once all fields have been satisfied.

Send an Invite in Schapptbook

1) On the **Patient Information** tab, scroll down to the **Healthe Life Portal** section.

2) Select the **Access Offered** dropdown and choose the appropriate option.
   a. **No:** if access to the portal was not offered to the patient.
   b. **Patient Declined:** if access was offered and the patient wasn't interested.
   c. **Yes:** if access was offered and the patient accepted. Additional fields will become required.



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3) If **Yes** was selected, satisfy the remaining fields.

   a. **Send Invite:** Choose **Send**.
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   c. **Challenge Answer:** Free Text the answer to the Challenge Question that was chosen by the patient.
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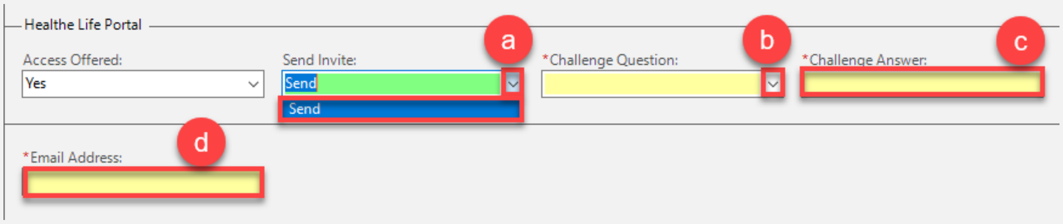


4) The **Invite Status** field is a read only field that will display once the registration has been completed or the invite for that patient portal has been sent. This list includes the following values:

   a. **Sent:** Displays when the invitation has been sent successfully to the patient's email address.
   b. **Sending:** Displays when the invitation is in process.
   c. **Self-Enrolled:** Displays when the person self-enrolled through the HealtheLife portal.
   d. **Error:** Displays when the invitation failed during the sending process.

Re-send an Invite using the Access Management Office Application

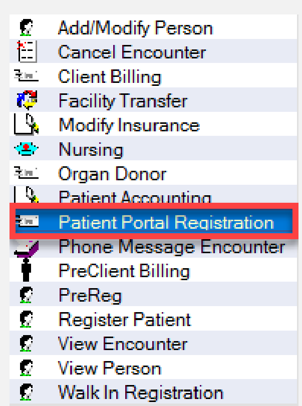
There may be times where the patient will express that they didn't receive the email invite, they accidentally deleted the email, or there is a technical error seen on their account. There is a Patient Portal Registration conversation that will allow users to directly access that portion of the patient's registration and quickly sign them up.

- ***Note**: Revenue Cycle clinics can complete the re-invite process by modifying the registration conversation through Rev Cycle if preferred.*

1) Launch the **Access Management Office application (**PM Office).

2) Double-click the **Patient Portal Registration** Conversation.

   a. Search and select the appropriate patient.



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<table>
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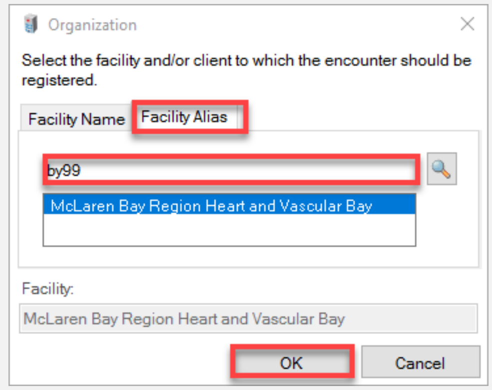
<td>

3) In the Organization window, select the Facility Alias tab.

   a. In the **Search** field, enter the **Cerner Location Code** for the clinic and hit enter.

   b. Select the clinic location and click **OK**.

</td>
<td>



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<td>

4) The **Patient Portal Registration** screen will open.

   a. In the Access Offered dropdown, select Yes. If access has already been offered and accepted, the **Access Offered** field will display **Yes** and cannot be changed.

   b. Confirm the email address that displays or enter one if needed.

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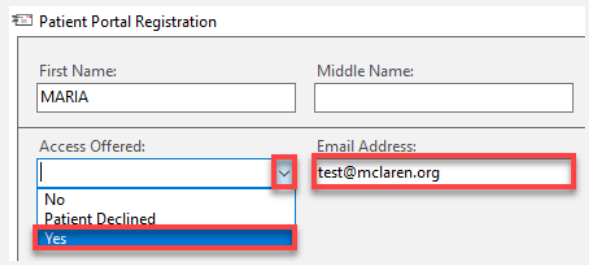


</td>
</tr>
<tr>
<td colspan="2">

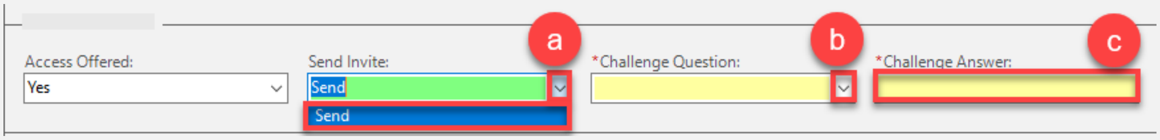
5) Satisfy the remaining fields:

a. **Send Invite:** Choose **Send**.

b. **Challenge Question:** Choose the appropriate option.

c. **Challenge Answer:** Free Text the answer to the Challenge Question that was chosen.

d. Click **OK** when done.



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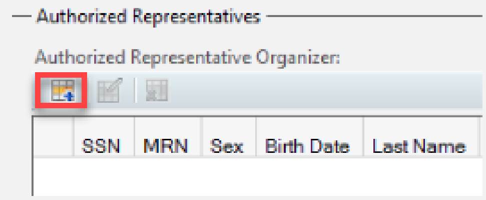
Authorized Representative Invite Workflow: Birth to 12 Years of Age

For patients' birth to 12, the **Authorized Representative** provides their first name, last name, date of birth, sex, and email address. Follow the steps below to add an Authorized Representatives to a minor's account to send an invitation to the patient portal.

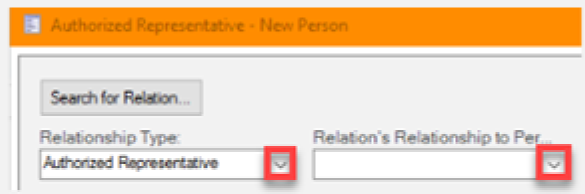
1) Within the appropriate registration screen, scroll down to the **HealtheLife Portal** section.

2) Select the **New Person** icon.



3) From the drop-down menu, select **Authorized Representative** for the **Relationship Type**.

4) Select the **Relationship to the Patient.**



5) Enter the person's **First Name** and **Last Name, DOB,** and **Sex**.

6) Alternatively, if the Authorized Rep has been seen at a McLaren facility, perform a person search by using the "**Search for Relationship**" button.

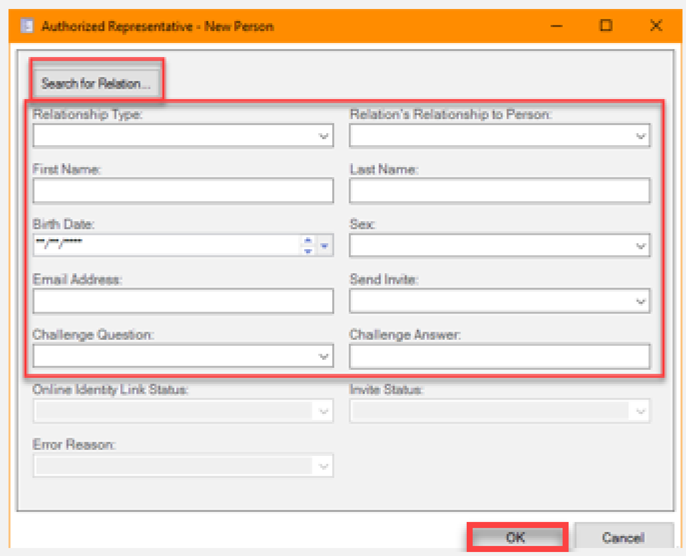
    a. This will open the patient search window to search and select the individual and will populate the required fields for you.

7) Enter/verify the Authorized Rep's **Email Address**.

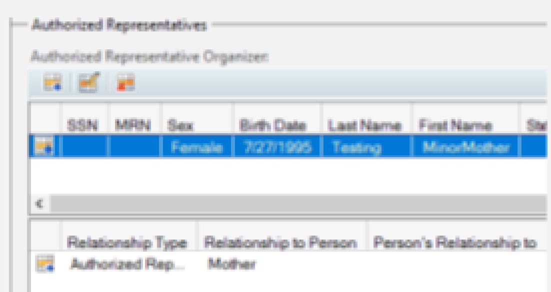
8) In the **Send Invite** dropdown, select **Send**.

9) Complete the **Challenge Question** and **Challenge Answer** fields.

10) Once all fields are completed, click **OK**.



11) Highlight the **Authorized Representative** you just added within the table. This pushes the **Relationship Type/Relationship to Person** into the bottom table.



12) Click **OK** to save all changes and send the invite.

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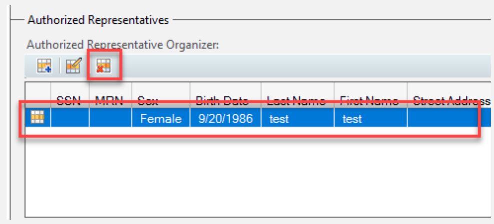
Removing an Authorized Representative

In instances where an Authorized Representative needs to be removed, follow the below steps. These steps can be completed from Revenue Cycle registration or the PMOffice application:

1) Within the appropriate registration screen, scroll down to the **HealtheLife Portal** section.

2) Select the Authorized Representative that should be removed and click the **Remove** icon.

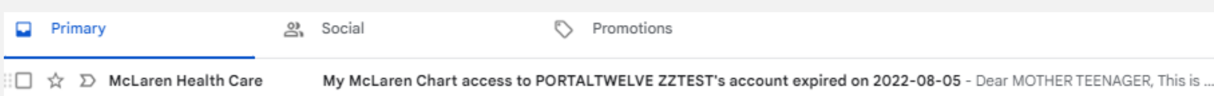


3) Click **OK.** The Authorized Representative is removed.

Automatic Expiration of Authorized Rep: Minor Turning 13

For minors who reach the age of 13 and have an Authorized Representative on their account, an email is sent to any Authorized Representatives with the below verbiage. The email is sent at 6 AM on the teen's 13th birthday.

> This is to notify you that your access to [***minor patient name]*** has expired on [***date***].
>
> This action is being taken because [***minor patient name***] is eligible to have his/her own account upon turning 13 years of age. Access given to all other users also expired on [***date***].
>
> Please advise [***minor patient name***] to contact his/her physician's office so that an account can be created that he/she can access directly.
>
> If you have any questions regarding this action, please contact his/her physician's office.
>
> You may also contact our technical support at:

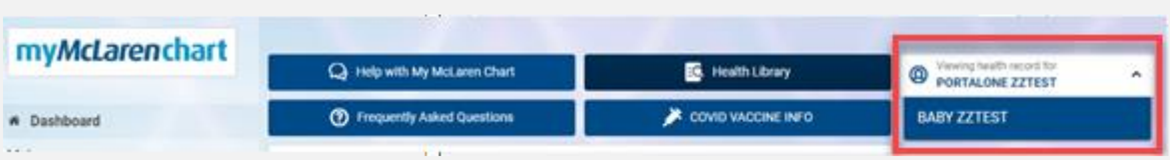


Patient as an Authorized Rep and Individual Account Holder

If an Authorized Rep is also a portal account owner themselves, the view within their account is controlled by a drop down in the upper right corner of the screen.

Scenario: When a mother has access to her own portal and is also an authorized representative for her child:

1. The mother is zztest, portalone and the child is zztest, baby.
2. The mother can toggle between the two records.
    - If the mother has more than one child, multiple names will display in the drop down.



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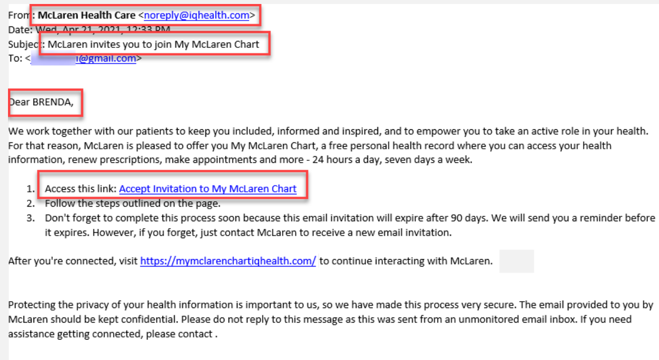
Claiming an Invite

The patient or Authorized Representative will follow the below steps to claim their patient portal invite. It is important staff are familiar with this process to be able to assist patients when needed.

1) Patient or Authorized Representative locates the email with the invitation link.

    - The email comes from *"McLaren Health Care – noreply@iqhealth.com"*
    - Subject: *"McLaren invites you to join My McLaren Chart"*

2) Patient or Authorized Representative clicks the "Accept Invitation to My McLaren Chart" link.



3) Patient or Authorized Representative completes the **Security Question** section as instructed.

    - Screens may look slightly different if accepting your own invite vs an Authorized Representative invite.

4) Patient or Authorized Representative clicks the **'Create Your Account'** button.

5) Create a username.

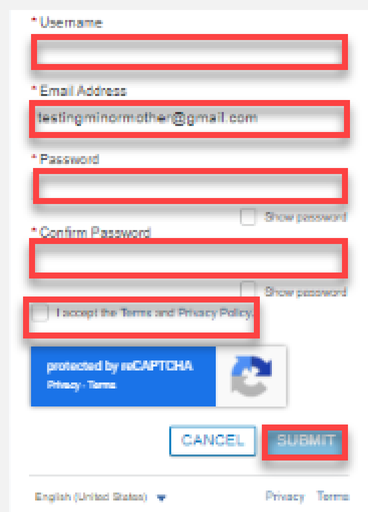
6) Confirm the email address listed.

7) Enter a password.
    - *Password must contain at least 1 number*
    - *Password must contain at least one capital letter*
    - *Password must contain at least one symbol*
    - *A secure password must be at least eight characters long*

8) Confirm password.

9) Patient or Authorized Representative will Accept the Terms and Privacy Policy.

10) Patient or Authorized Representative will click **Submit** and complete a reCAPTCHA question.



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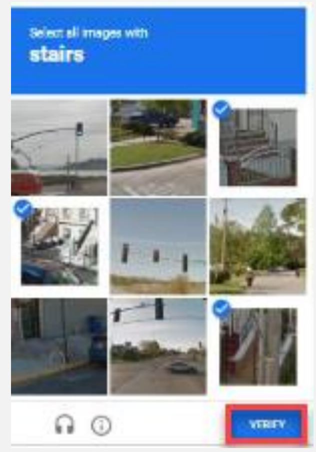
<table>
<tr>
<td>11) Patient or Authorized Representative will complete a reCAPTCHA question.

12) Click Verify once complete.</td>
<td>
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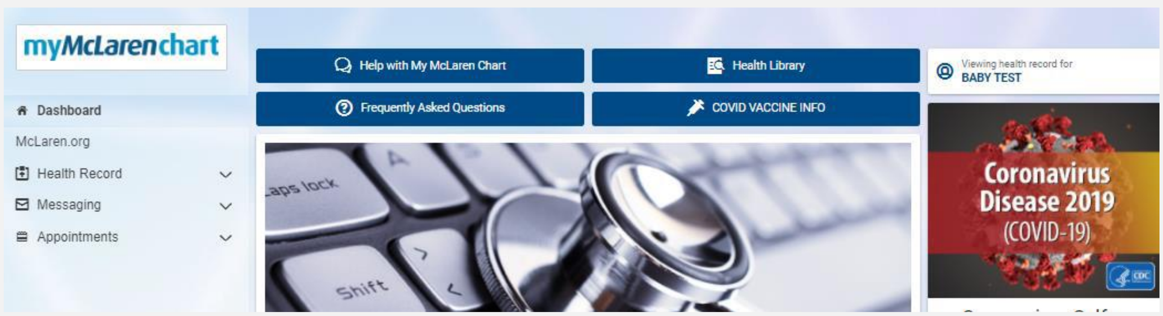
<tr>
<td colspan="2">13) Upon successful enrollment, the patient or authorized rep is presented with the homepage of My McLaren Chart.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Consumer Messaging

Overview of Consumer Messaging

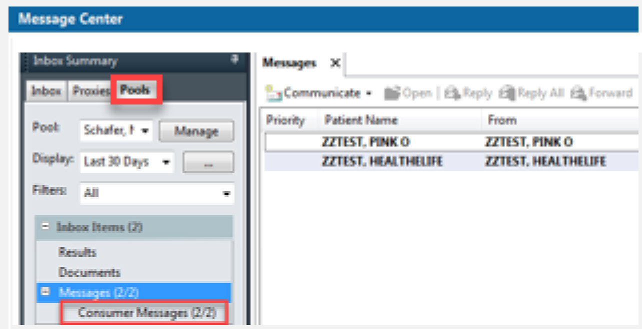
Once the patient has joined the portal, they have the capability of directly messaging their providers. The messages from the portal will populate to the Message Center in Cerner PowerChart.

In Message Center, the Messages are routed to the appropriate Pool within a folder called **Consumer Messages**. After a patient sends a message, HealtheLife informs them to expect a response from their provider within 3 days. Consumer messages within the pools should be monitored daily.

Reply to a Consumer Message

1) To view patient portal messages, select appropriate **Pool** from within **Message Center** and select the **Consumer Messages** folder.
   - ***Note:*** *The Consumer Messages folder only displays in the inbox if there are messages in it. Otherwise, it doesn't display.*

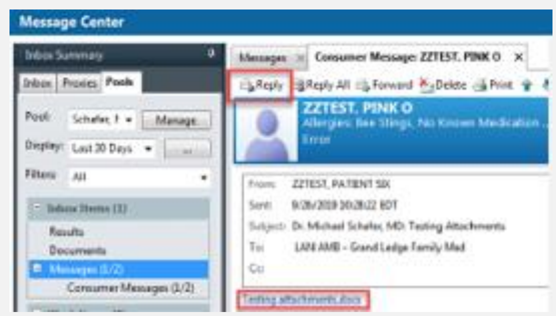
2) **Double click** the message to open it.



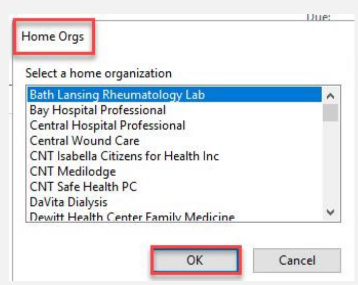
3) To reply to the patient, click **Reply** to send a message back to their portal.

   a. If an **attachment** was included in the patient's message, a **hyperlink** will display within the message. **Click** the hyperlink to view.

   b. To save the attachment, click the **Save to Chart** button.



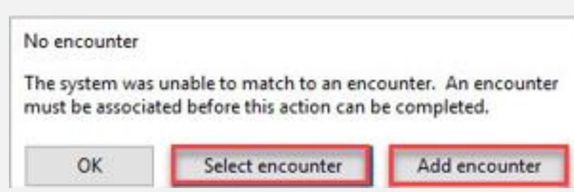
4) The **Home Orgs** popup box will appear. Select your clinic from the list and click **OK**.
   - ***Note:*** *Users can set a "Top 5" in the list to filter the choices. Users can also set a default home organization. See section **Message Center Preferences** section for more information.*



5) The **encounter window** displays. Select the appropriate **encounter** and click **OK.**

   a. If patient does not have an **Outpatient Message** FIN to link to, click **Cancel**, go back to the encounter window prompt, and select **Add Encounter**.

   b. Selecting **Add Encounter** will prompt a window to create an Outpatient Message FIN.



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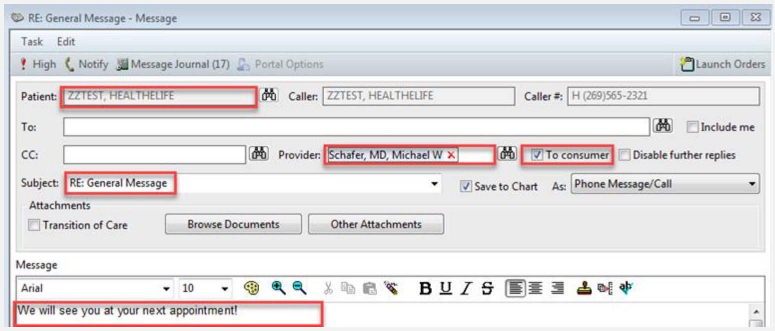
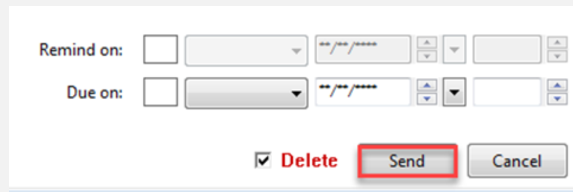
Approval Date: 9.20.22
Update Date:

6) Type your reply to the patient in the **Message** field.

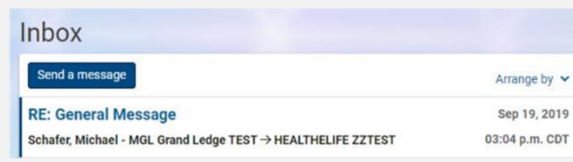
   a. The patient's **name, provider** and **subject line** will already be populated.
   b. The **To Consumer** checkbox will be automatically selected.
      - *The **To Consumer** checkbox is what dictates whether the message is sent back to the patient via the portal.*



7) Click **Send** when done.



8) The new message will route instantly into the patient's portal Inbox.



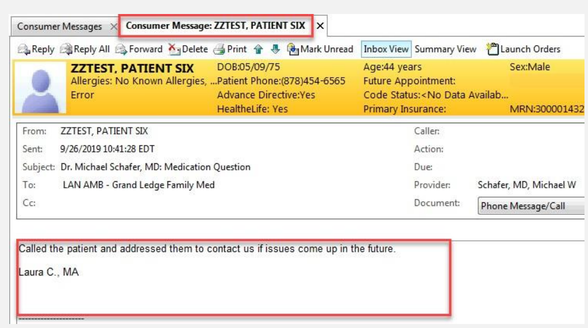
Document and Save a Consumer Message

There may be instances when a patient portal message is better addressed by a phone call rather than an electronic response. There is no requirement to respond to the patient electronically.

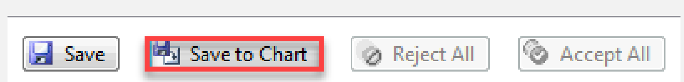
In the event a message does not require an electronic response, an addendum may be documented in the message and saved to the patient's chart.

1) To document a response without sending a message back to the patient's portal:

   a. **Double-click** the message to open.
   b. Free text the response in the **Add Text** field within the message.

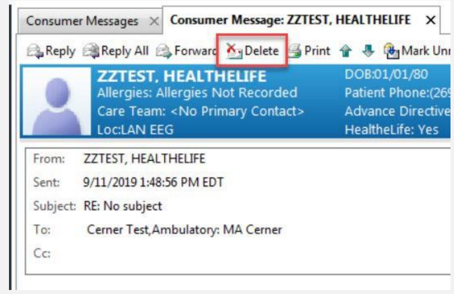


2) Once finished, click **Save to Chart** on the bottom of the screen.

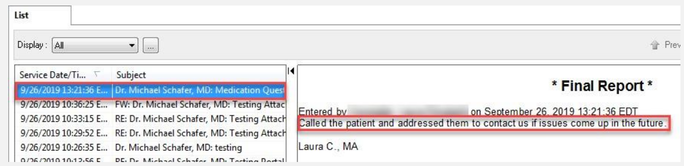


Drafted by: MMG Training Team
Approval Date: 9.20.22
Update Date:

3) Click **Delete** to remove the message from the pool inbox.



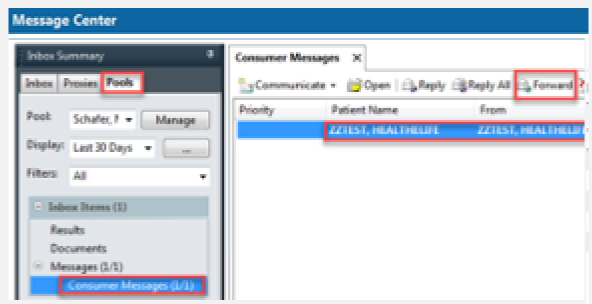
4) The patient's message along with the addendum will be housed in the **Documentation** of the patient's chart in Cerner.



Forwarding a Consumer Message

Consumer Messages can be forwarded to other inboxes or individual recipients, just like any other message within Message Center. This may be needed when staff are unable to answer a message, so it needs to be sent to the provider for further direction. The provider can choose to respond back to the patient directly or only to the staff member that forwarded the message.

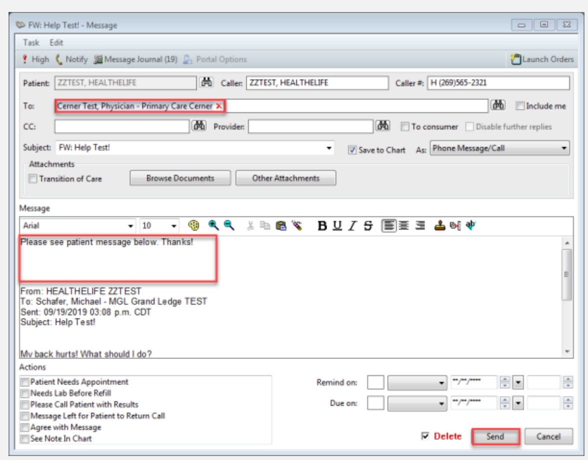
1) To forward a patient message, highlight the message and select **Forward.**



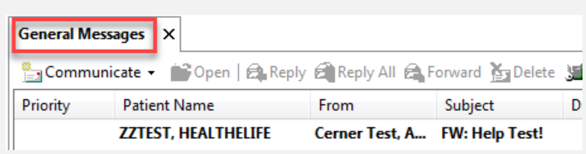
2) Use the **Binoculars** icon next to the **To** field to search and select the **Provider** or **Staff Member** this message needs to be sent to.

3) Type a **message** in the **Message** field and click **Send** when complete.

- ***Note**: All correspondence between staff members should remain professional and clinically relevant, as the patient will be able to see the entire string in their portal inbox once the response is sent back to them.*



4) The new message will populate to the recipient's inbox under **General Messages**.

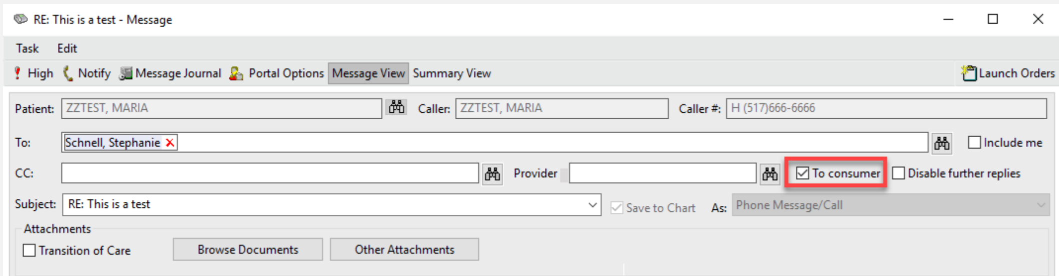


Drafted by: MMG Training Team
Approval Date: 9.20.22
Update Date:

5) The recipient can click **Reply** and respond directly to the patient by selecting the **To Consumer** checkbox when replying.

   a. The message and all replies/addendums will be sent back to the patient.

   b. Alternatively, the recipient can leave the **To Consumer** checkbox **unchecked** to send a reply to the sender only and not the patient.

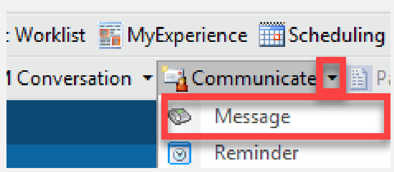


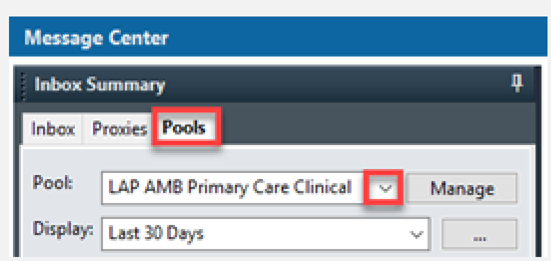
Initiate a Consumer Message

Staff can initiate a message to a patient from within Cerner PowerChart if that patient is a registered HealtheLife user. To see if a patient is currently enrolled with HealtheLife, check the **HealtheLife** status on the patient banner.

It is recommended to always initiate a message from the appropriate **pool**. If the message is sent from your personal inbox, you will be the only one able to reply unless your co-workers are checking your Proxies box. Timely response time for portal messages is important. When a patient sends a message from the portal, they are notified they will get a response **within 3 business days**.

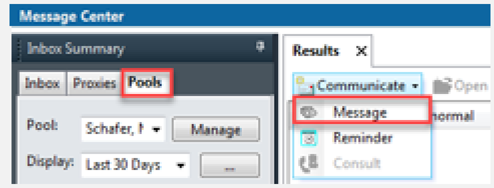
If using the **Communicate** button from the toolbar, this sends the message from your **personal** inbox (*unless you have changed your Message Center preferences to default to a specific pool). It is recommended to send a Consumer Message from the Message Center instead, as shown below.



1) Click the **Message Center** button on the toolbar.	
2) Select the **Pools** tab.	
3) From the **Pool** dropdown, select the appropriate pool to send a message from.	

Drafted by: MMG Training Team
Approval Date: 9.20.22
Update Date:

4) Click on the **Communicate** dropdown and select **Message**.



5) In the **Patient** field, search and select the patient.

6) Select the **To consumer box,** as this will route the message to their portal account.

- ***Note:*** *If the patient is not 'active' in the HealtheLife portal, To Consumer will be grayed out. A message can only be sent to patients already utilizing this portal.*

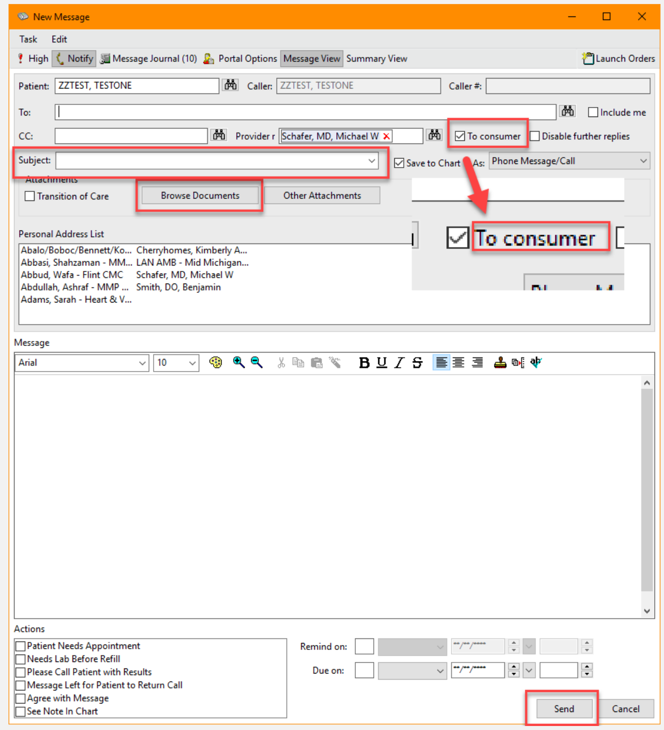
7) Free text or use the drop down to select the **Subject** line of the message.

8) Use the **Browse Documents** button to attach any documents from the chart to send to the patient if needed.

9) Enter the message in text box.

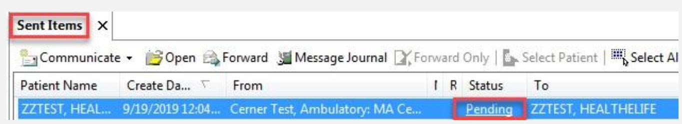
   a. Click **Send** when complete.

   - ***Note:*** *Everything you write is viewable by the patient. Messages should be professional and clinically relevant.*



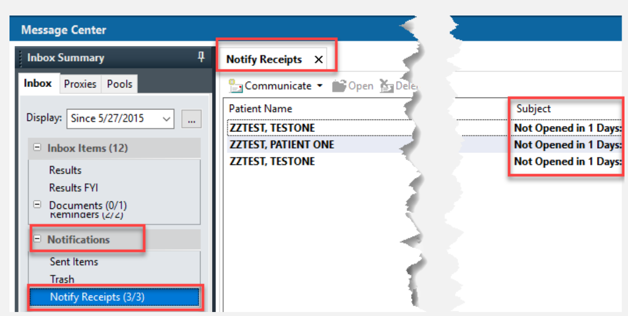
10) The message will now be visible in the **Sent Items** folder of the pool.

   a. The status will change to **Opened** once the patient opens the message.



11) If the patient doesn't open the message in the portal within one day, the sender will receive a **Notify Receipt** in the **Notifications** section of Message Center.

- ***Note:*** *Users must have their preference set to receive the Notify Receipt. See the Message Center Preferences section from more information.*



Drafted by: MMG Training Team
Approval Date: 9.20.22
Update Date:

Message Center

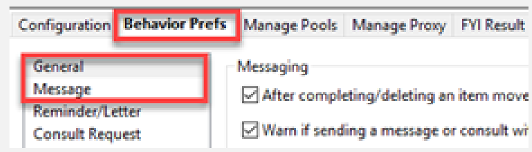
Message Center Preferences

There are a variety of **Message Center Preferences** that can be set by the user that pertain to the patient portal messaging functionality.

<u>To Access Message Center Preferences:</u>

1) Click **Message Center**
   a. Select **Inbox** from the Toolbar.
   b. Select **Manage Preferences** from the Menu.

2) In the **Behavior Prefs** tab, select the appropriate section from the left pane.
   a. General Tab
   b. Message Tab



General Tab

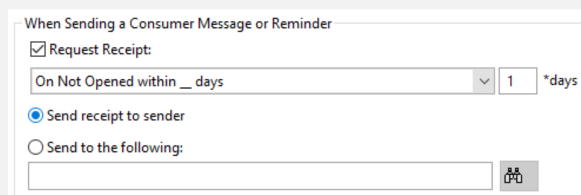
<u>When Sending a Consumer Message or Reminder:</u>

Description: The preference sends a Notify Receipt for Consumer Messages or Reminders.

System Default: None

User Options: Users can choose to update the Not Opened interval, and where the read Notify Receipt message gets routed.

- *Ex: a provider can set the Notify Receipt to route to their Clinic Pool.*



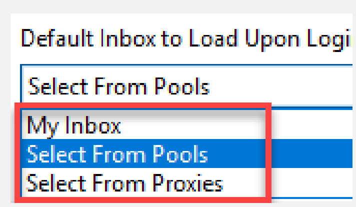
<u>Default Inbox to Load Upon Login</u>

Description: The preference determines what tab of the Message Center displays "face up" when the user accesses Message Center. This also determines what inbox messages will be sent ***from*** when the user sends a message within the Message Center→ Communicate button.

System Default: My Inbox

User Options:

- Select from Pools
- Select from Proxies (not relevant)



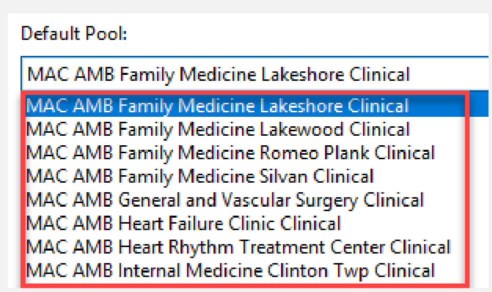
<u>Default Pool</u>

Description: The preference determines what Pool is set by default when accessing the Pools tab of Message Center.

System Default: None

- If no default is set, the most recent Pool the user has opted into shows by default.

User Options: Users can set any Pool they're opted into as default.



Message Tab

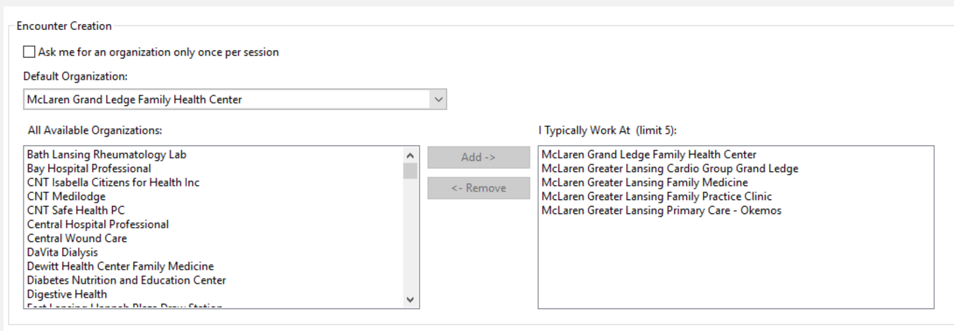
Encounter Creation

Description: The preference allows for a default organization to be set when creating in-between visit encounters. There is also an option for users to specify which locations (up to 5) the user typically works at if they work at multiple locations and can't set a default.

System Default: None

User Options:

1. Set any location as the Default Organization.
2. Choose a Top 5 list if the user can't set a default (because they work in more than one location).
   - ***Note:*** *Users should not select the "Ask me for an organization only once per session" if the user works in more than one location.*



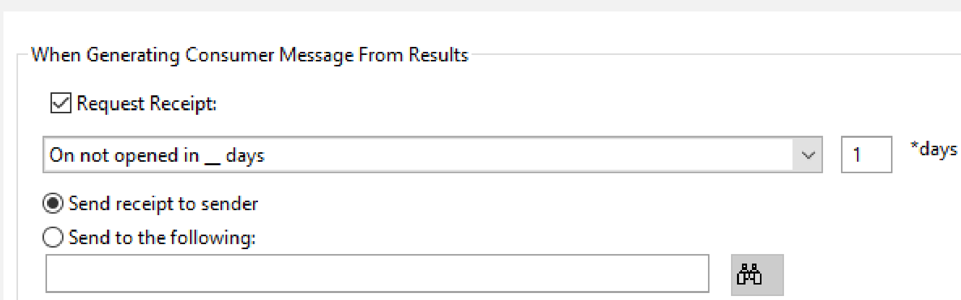
When Generating Consumer Messages From Results

Description: The preference pertains only to result messages that are sent to a Consumer. It sends a Notify Receipt based on the options shown below.

System Default: None

User Options: Users can choose the Request Receipt checkbox and update the Not Opened interval, and where the read Notify Receipt message gets routed.

- *Ex: a provider can set the Notify Receipt to route to their Clinic Pool.*



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