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Clinical Notes Released to the HealthLife Patient Portal

January 8, 2024

Clinical Notes Released to the HealthLife Patient Portal Overview

Beginning January 9, 2024

McLaren Health Care is making changes to the HealthLife Patient Portal to bring our system in compliance with federal regulations and standards and improve our patients' access to information regarding their conditions.

Patients will begin to see Clinical Notes in their patient portal as soon as they are finalized.

- This includes those items created electronically in Cerner or scanned into the system.
- This includes note types such as office provider notes, history and physical notes, consultations, emergency visits, progress notes, discharge summaries, and procedure notes.
- Please see the end of this document for a list of document types that will and will not be released to the patient portal.

Ambulatory Only- Scanning Impact

When staff perform scanning workflows, the appropriate document type and the appropriate patient must be chosen when filing documents into the patient's chart.

If you perform scanning and filing functions, please review the following updated education to ensure a solid understanding of scanning workflows and how it impacts what a patient can view in their HealthLife portal account.

1. **Scanning and Filing Prerequisites:** Pages 4-6
2. **Document Types Viewable to Patients in HealthLife Patient Portal** Pages 42-43

Link Here: [**AMB Job Aid Scanning Guide.pdf**](#)

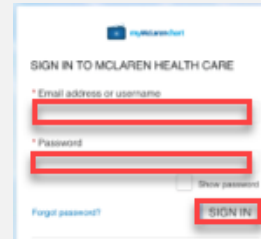
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Clinical Notes Released to the HealtheLife Patient Portal (Patient Perspective)

The patient will access their HealtheLife patient portal to view/download Clinical Notes/Documentation as described below:

1) Patient logs into their patient portal by entering their **Email Address/Username** and **Password**.

a. Click **Sign In**.

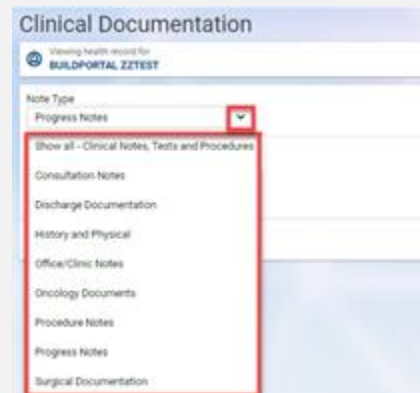


2) From the Dashboard, the patient will select the **Health Record** section and choose **Clinical Documentation**.

a. The available Clinical Notes, Tests and Procedures will display.



3) Patients can filter the list by selecting the desired Note Type from the dropdown.



4) The patient will be able to view/download their report(s) as desired.



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Document Types Viewable to Patients in the HealthLife Patient Portal

<p><u>Behavioral Health Documents</u></p> <ul style="list-style-type: none"> Behavioral Health Document Psychiatric Case Summary <p><u>Cardiology Procedures</u></p> <ul style="list-style-type: none"> Balloon Aortic Valvuloplasty Cardiac Cath Procedure Cardiac Catheterization diagnostic PCI (Percutaneous Coronary Intervention) Cardio Test or Study Cardiology General Procedures Device Interrogation Report Electrocardiogram EKG Electrophysiologic Study EP Event Monitoring Fetal Heart Holter Monitor Myocardial Biopsy Telemetry Rhythm Strips Tilt Table Test Echo Report Echocardiogram Stress Echocardiogram Transesophageal Echocardiogram Transthoracic CV Exercise Stress Test CV Holter Monitor CV Pharm Stress Test ECG 12 Lead (93005 / 93010) ECG 12 Lead AMB (93000) ECG 15 Lead (93005 / 93010) Cardiopulmonary Stress Test Exercise Stress MPI MUGA Scan Pharmacologic Stress MPI Stress ECG Carotid Ultrasound Thrombectomy Vascular Report General Vascular US Imaging Vascular US Imaging Interpretation Vein Graft Assessment Venous Duplex Scan <p><u>Consultation Notes</u></p> <ul style="list-style-type: none"> Allergy Immunology Consultation Anesthesiology Consultation Cardiology Consultation Cardiothoracic Consultation Cardiovascular Surgery Consultation Colon and Rectal Consultation Consultation Note Generic Critical Care Consultation Dental Oral Surgery Consultation Dermatology Consultation Endocrinology Consultation ENT Consultation 	<p><u>Consultation Notes, Cont.</u></p> <ul style="list-style-type: none"> Ethics Consultation Family Medicine Consultation Gastroenterology Consultation Gynecology Consultation Hospitalist Medicine Consultation Infectious Disease Consultation Internal Medicine Consultation Interventional Radiology Consultation Long term Care Consultation Neonatal Consultation Nephrologist Consultation Neurointervention Consultation Neurology Consultation Neurosurgery Consultation Nutrition Consultation Obstetrics Consultation Ophthalmology Consultation Orthopedic Consultation Palliative Care Consultation Pathology Consultation Pediatrics Consultation Perinatology Consultation Physiatrist Consultation Plastic Surgery Consultation Podiatry Consultation Pulmonology Consultation Rehab Medicine Consultation Rheumatology Consultation Sports Medicine Consultation Surgery Consultation Surgical Consultation Telemedicine Consultation Thoracic Surgery Consultation Trauma Consultation Urogynecology Consultation Urology Consultation Vascular Consultation <p><u>Discharge Documentation</u></p> <ul style="list-style-type: none"> Discharge Summary <p><u>Emergency Documentation</u></p> <ul style="list-style-type: none"> ED Note Physician / Provider <p><u>Endocrinology Procedures</u></p> <ul style="list-style-type: none"> Endocrinology US Imaging Endocrinology US Imaging Interpretation <p><u>Gastroenterology Procedures</u></p> <ul style="list-style-type: none"> 24 Hour pH Probe Abdominal Paracentesis Abdominal Ultrasound Anorectal Manometry Breath Hydrogen Colonoscopy 	<p><u>Gastroenterology Procedures Cont.</u></p> <ul style="list-style-type: none"> Endoscopic Retrograde Cholangiopanc ERCP Esophageal Manometry Esophagogastroduodenoscopy EGD Feeding Tube Placement Flexible Sigmoidoscopy Liver Biopsy Panendoscopy Sigmoidoscopy Transrectal Transanal Ultrasound <p><u>Genitourinary Procedures</u></p> <ul style="list-style-type: none"> Doppler Penile Urosonography Ileoscopy Lithotripsy Treatment Pudendal Nerve Stimulation Renal Ultrasound <p><u>Gynecology Procedures</u></p> <ul style="list-style-type: none"> Gynecology US Imaging Gynecology US Imaging Interpretation <p><u>History and Physical Reports</u></p> <ul style="list-style-type: none"> History and Physical History and Physical Update <p><u>Imaging</u></p> <ul style="list-style-type: none"> Imaging Requisition MRI MRA Nuclear Medicine Reports PET Reports Radiology Reports Special Procedure <p><u>Interventional Radiology Procedures</u></p> <ul style="list-style-type: none"> Interventional Radiology Procedure <p><u>Clinical Documents</u></p> <ul style="list-style-type: none"> Laboratory Report Pathology Report Reference Lab <p><u>Miscellaneous Patient Care</u></p> <ul style="list-style-type: none"> Implant Device Record Patient Amendment Return to Work/School <p><u>Neurology Procedures</u></p> <ul style="list-style-type: none"> Brainstem Electrical Response Electroencephalography EEG Electromyogram Nerve Conduction Neurodiagnostic Transcranial Doppler TCD Visual Evoked Potential VEP <p><u>Obstetrics Procedures</u></p> <ul style="list-style-type: none"> Obstetric Non-Stress Test Obstetric US Imaging Obstetric US Imaging Interpretation 	<p><u>Office/Clinic Notes</u></p> <ul style="list-style-type: none"> Allergy/Immunology Clinic Procedure Allergy/Immunology Office Clinic Note Ambulatory Clinical Summary Ambulatory Patient Education Annual Wellness Visit Antepartum Note Art Therapy Note Audiology Clinic Procedure Audiology Office Clinic Note Breast Surgery Clinic Procedure Breast Surgery Office Clinic Note Cardiology Clinic Procedure Cardiology Office Clinic Note Cardiothoracic Clinic Procedure Cardiothoracic Office Clinic Note Cardiovascular Surgery Office Note Clinic Progress Note Colon and Rectal Clinic Procedure Colon and Rectal Office Clinic Note Dermatology Clinic Procedure Dermatology Office Clinic Note Diabetic Education DOT Physical Endocrinology Clinic Procedure Endocrinology Office Clinic Note ENT Clinic Procedure ENT Office Clinic Note Family Medicine Clinic Procedure Family Medicine Office Clinic Note Gastroenterology Clinic Procedure Gastroenterology Office Clinic Note Geriatrics Clinic Procedure Geriatrics Office Clinic Note Gynecology Clinic Procedure Gynecology Office Clinic Note Infectious Disease Clinic Procedure Infectious Disease Office Clinic Note Infusion Services Clinic Procedure Internal Medicine Clinic Procedure Internal Medicine Office Clinic Note Interventional Radiology Office Clinic Note Interventional Radiology Procedure Note MFM Office Clinic Note Neonatal Clinic Procedure Neonatal Office Clinic Note Nephrologist Clinic Procedure Nephrologist Office Clinic Note Neurointervention Clinic Procedure Neurointervention Office Clinic Note Neurology Clinic Procedure
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Office Notes, Cont.

- Neurology Office Clinic Note
- Neuropsychology Clinic Procedure
- Neuropsychology Office Clinic Note
- Neurosurgery Clinic Procedure
- Neurosurgery Office Clinic Note
- Obstetrics Clinic Procedure
- Obstetrics Office Clinic Note
- Office Clinic Note Physician/ Provider
- Ophthalmology Clinic Procedure
- Ophthalmology Office Clinic Note
- Orthopedic Clinic Procedure
- Orthopedic Office Clinic Note
- Otolaryngology Clinic Procedure
- Otolaryngology Office Clinic Note
- Pain Management Clinic Procedure
- Pain Management Office Clinic Note
- Palliative Care Office Clinic Note
- Pediatric GI Office Clinic Note
- Pediatric ID Office Clinic Note
- Pediatric Neurology Office Clinic Note
- Pediatrics Clinic Procedure
- Pediatrics Office Clinic Note
- Psychiatrist Office Clinic Note
- Physical Med and Rehab Clinic Procedure
- Physical Med and Rehab Clinic Office Note
- Physician / Provider Evaluation
- Plastic Surgery Clinic Procedure
- Plastic Surgery Office Clinic Note
- Podiatry Clinic Procedure
- Podiatry Office Clinic Note
- Pulmonology Clinic Procedure
- Pulmonology Office Clinic Note
- Radiology Medicine Clinic Procedure
- Rehab Medicine Office Clinic Note
- Rheumatology Clinic Procedure
- Rheumatology Office Clinic Note
- Sleep Medicine Clinic Office Note
- Sleep Medicine Clinic Procedure
- Sports Medicine Clinic Procedure
- Sports Medicine Office Clinic Note
- Surgery Office Clinic Note
- Telemedicine Office Clinic Note
- Trauma Office Clinic Note
- Urgent Care Clinic Procedure
- Urgent Care Office Clinic Note
- Urogynecology Office Clinic Note
- Urology Clinic Procedure
- Urology Office Clinic Note
- Vascular Clinic Procedure
- Vascular Office Clinic Note
- Well Child Check
- Wound Clinic Assessments
- Wound Clinic Discharge Instructions

Office Notes, Cont.

- Wound Clinic Document
- Wound Clinic HBO
- Wound Clinic Medications
- Wound Clinic Office Clinic Note
- Wound Clinic Procedure
- Wound Clinic Provider Documentation
- Wound Clinic Test Results
- Oncology Documents**
- BMT Consultation
- BMT Harvest
- BMT Office/Clinic Note
- BMT Procedure Note
- BMT Progress Note
- Chemotherapy Teach
- Gynecologic Oncology Clinic Note
- Gynecologic Oncology Consultation Note
- Gynecologic Oncology Procedure Note
- Gynecologic Oncology Progress Note
- Hematology Consultation
- Hematology Office/Clinic Note
- Hematology Oncology Consultation
- Hematology Oncology Office/Clinic Note
- Hematology Oncology Procedure Note
- Hematology Oncology Progress Note
- Hematology Progress Note
- Medical Oncology Consultation
- Medical Oncology Office/Clinic Note
- Medical Oncology Procedure Note
- Medical Oncology Progress Note
- Surgical Oncology Clinic Procedure
- Surgical Oncology Consultation
- Oncology Documents Cont.**
- Surgical Oncology Office/Clinic Note
- Surgical Oncology Progress Note
- Survivorship Note
- Other Diagnostics**
- Anesthesia Procedure Note
- Blood Patch Report
- Critical Care / Intensivist Procedure
- Diagnostic Report
- Electroretinography ERG
- Endovascular Procedure
- Procedure Note
- Segmental Arterial Pressures
- Physical Med & Rehab Procedures**
- Physical Med and Rehab US Imaging
- Physical Med and Rehab US Interpretation

Progress Notes

- Allergy Immunology Progress Note
- Anesthesiology Progress Note
- Anticoagulation Progress Note
- Cardiology Progress Note
- Cardiothoracic Progress Note
- Cardiovascular Progress Notes
- Colon and Rectal Progress Note
- Critical Care Progress Note
- Dermatology Progress Note
- Diabetes Education Progress Note
- Endocrinology Progress Note
- ENT Progress Note
- Family Medicine Progress Note
- Gastroenterology Progress Note
- Gynecology Progress Note
- Hospitalist Medicine Progress Note
- Hospice Progress Note
- Hyperbaric Progress Note
- Infectious Disease Progress Note
- Interdisciplinary Rounding Summary Note
- Internal Medicine Progress Note
- Nephrologist Progress Note
- Neuro Critical Care Progress Note
- Neurointervention Progress Note
- Neurology Progress Note
- Neurosurgery Progress Note
- Newborn Telehealth Note
- Obstetrics Progress Note
- Occupational Therapy Progress Note
- Ophthalmology Progress Note
- Orthopedic Progress Note
- Pain Management
- Palliative Care Progress Note
- Pastoral Care Progress Note
- Pediatric Progress Note
- Perinatology Progress Note
- Psychiatrist Progress Note
- Plastic Surgery Progress Note
- Podiatry Progress Note
- Progress Note Generic
- Pulmonology Progress Note
- Radiation Therapy Progress Note
- Recreation Therapy Progress Note
- Rehab Medicine Progress Note
- Rehabilitation Therapy Progress Note
- Research Progress Note
- Rheumatology Progress Note
- Speech Therapy Progress Note
- Sports Medicine Progress Note
- Surgery Progress Note
- Thoracic Surgery Progress Note

Progress Notes Cont.

- Transplant Progress Notes
- Trauma Progress Notes
- Trauma Tertiary Survey Progress Note
- Urogynecology Progress Note
- Urology Progress Note
- Vascular Progress Note
- Wound Care Progress Note

Pulmonology Procedures

- Bronchoscopy
- Methacholine Challenge Test
- Pulmonary Function Studies
- Respiratory Notes
- Sleep Study

Rehabilitation Notes

- Cardiology Rehab Initial Treatment Plan
- Cardiology Rehab Note
- Occupational Therapy Note
- Outpatient OT Plan Note
- Outpatient PT Plan Note
- Outpatient Speech Language Plan Note
- Outpatient Swallow Plan Note
- Physical Therapy Rehab Note
- Physical Therapy Note
- Pulmonary Rehab Initial Treatment Plan
- Pulmonary Rehab Note
- Rehab Note
- Rehab Outcome Measures
- Speech Language Pathology Note
- Therapy Note

Surgical Documentation

- Operative Report

Therapeutic Notes

- Therapeutic/Intervention Note

Urgent Care

- Urgent Care Assessments

Urology Procedures

- Urology US Imaging
- Urology US Imaging Interpretation

Women's Health Documents

- Antenatal Testing Note
- Delivery Note
- Pregnancy Summary Document

Gynecology Procedures

- Gynecology US Imaging Interpretation

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Document Types Not Viewable to Patients in the HealtheLife Patient Portal

Clinical Note Type	Examples
• Administrative Documents	Billing Authorizations, Claims, Medicare Forms, Referral Authorizations, etc.
• Advance Directive Documents	Advance Directive Revocation, Certificate of Bequeathal.
• Anesthesia Records	Pre and Post Anesthesia Notes.
• Care Coordination Forms	Care Coordination
• Clinical Trials	Clinical Trial Calendar, Consent, Treatment Order.
• Confidential Documents	Protected Notes
• Correspondence	General Messages, Patient Conversations, Phone Messages, Reminders.
• Discharge Documentation	BEH Clinical Discharge Summary, Discharge Note Nursing, Nursing Discharge Summary, Oncology Clinical/Patient Summary, Perioperative Clinical/Patient Summary, Record of Death, WH Clinical Summary, WH Patient Education Note, etc.
• Emergency Documentation	ED Call Back Log, ED Clinical Summary, ED Note Nursing, ED Patient Summary, ED Triage Note, etc.
• External Documents	Documents scanned into an External Document Type.
• Face Sheets	Face Sheets from visit.
• HIM	Administrative Closure, Coding Merge Attestation, Coding Merge Summary, Coding Query, HIPAA Privacy Documents, Professional Coding Query, ROI.
• In Error Documents	Documents put in-error
• Lab	Venipuncture Blood Draw.
• Letters	Disability or Workers Comp, Patient/Provider Letter, Referral Letter.
• Long Term Care Documentation	Care Tracker Reports, MDS Assessments.
• Medication Documents	HIM Specialty Pharmacy, IV Infusion, Medication, and Injections.
• Misc. Patient Care	Allergy Record, DME, Home Health Note, Infection Prevention Note, Long Tern Nursing, Medication Management Agreement/Inactivation, Release of Treatment, Skilled Nursing.
• Nursing	Care Conferences, Flowsheets, Graphic Charts, Measurement Graphs, Nursing Assessment, Nursing Documents, Restraint/Seclusion.
• Patient Alerts	Open Chart Alerts Admin/Clinical, Prescription Alerts.
• Perioperative Record	IntraProcedure Record, Periop Clinical Summary, Periop Patient Education, Periop Patient Summary, Post Procedure Record.
• Pharmacy Powerforms	Parenteral Nutrition forms, Pharmacy Clinical Interventions.
• Physician Orders	Home Health orders, Hospice orders, Lab/Path Requisition.
• Progress Notes	Assistive Personnel Narrative, Behavioral Health Patient/Clinical Summary, Case Manager Progress Note, Code Stroke Note, Code Blue Note, Tech Notes, Newborn Assessment Notes, NICU Code Notes, Nurse Navigator Notes, Nutrition Notes, Pharmacy Progress Notes, Psychosocial Tx Plan, Rapid Response or Event, Research Note, Tumor Conference Summary.
• Student Documentation	Medical Student Note, Nurse Practitioner Student Note, Physician Assistant Student Note.
• Surgical Documentation	Pre-Operative Note, intra-Operative Note, Post-Operative Note,
• Transfer Notes	Newborn Transitions, TOC Referral Inbound/Outbound.
• Urgent Care	Urgent Care Clinical Summary, Urgent Care Patient Education Note, Urgent Care Patient Summary.