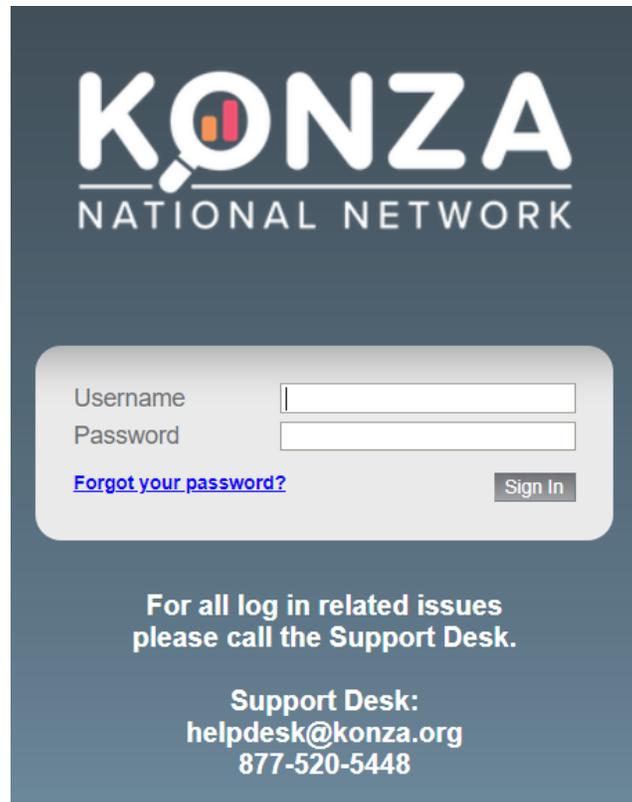


Website: <https://konzax.org/>

Support Contact: [helpdesk@konza.org](mailto:helpdesk@konza.org) or 877-520-5448

For best viewing results use Chrome, Edge, or FireFox browsers



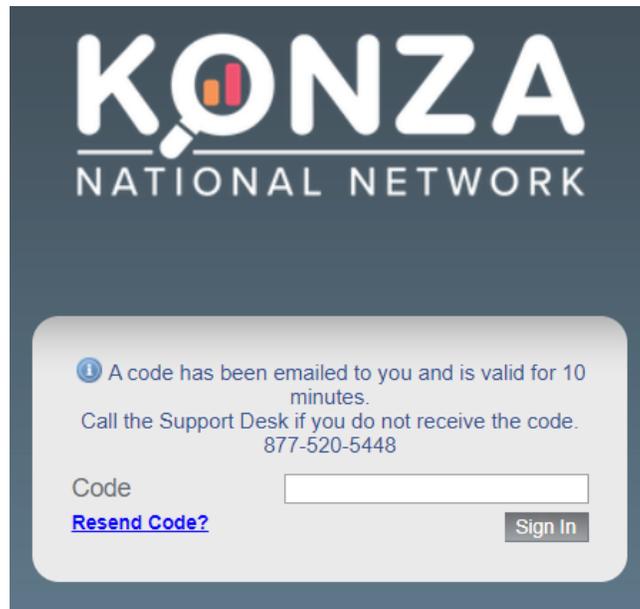
## Contents

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## Logging In using MFA: (Multi-Factor Authentication)

After you enter your User ID and password you will be taken to a 2<sup>nd</sup> screen to enter a Code

- A 6-digit number will be emailed to the email address on your account.
- The emails will come from do-not-reply@carealign.net
- You will need to enter this code number to access your exchange account.



The screenshot shows the MFA code entry screen. At the top is the KONZA NATIONAL NETWORK logo. Below the logo is an information icon (i) followed by the text: "A code has been emailed to you and is valid for 10 minutes. Call the Support Desk if you do not receive the code. 877-520-5448". Below this text is a label "Code" and an empty input field. To the left of the input field is a blue link "Resend Code?". To the right of the input field is a grey button labeled "Sign In".

If you do not receive a code email, and no error is showing on the screen please contact your IT department to ensure that the email domain that the codes are coming from are whitelisted in your emailing system.

If you run into any issues, please call the helpdesk at 877-520-5448

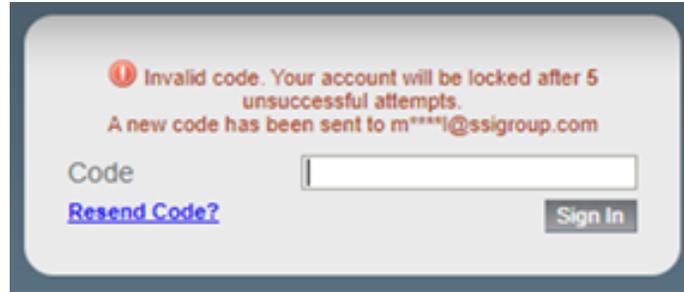
### Potential Error messages:

If you do not have a valid email address listed on your account you will need to have your facility Client Administrator contact the helpdesk to have your account updated.



The screenshot shows the login screen with an error message. At the top is an error icon (i) followed by the text: "You must have an email address tied to your account in order to use multi-factor authentication. Please contact an administrator." Below this text are two input fields labeled "Username" and "Password". Below the input fields is a blue link "Forgot your password?". To the right of the input fields is a grey button labeled "Sign In".

If you enter an invalid code number, you can try again. Or you can click the Resend Code link to have a new email sent with a new code.



## Changing Password:

- Input your current password
- Enter a new password that meets the requirements listed above
- Enter the new password again to verify it.
  - You will have 2 green check marks showing when your password is acceptable.

When completed, click CHANGE.

### Change Password

**i** You are changing your password because your account has been reset or you are accessing CareAlign Suite for the first time.

- Length - Must be at least seven (7) characters long.
- Characters - Must contain characters from three (3) of the following four (4) classes:
  - Uppercase Characters ( A, B, C, D, ... Z )
  - Lowercase Characters ( a, b, c, d, ... z )
  - Numbers ( 1, 2, 3, 4, ... 9 )
  - Non-Alphanumeric Characters, such as punctuation symbols
- Uniqueness - This password has recently been used for this account. Please choose a new password.
- Username - Cannot contain your username.
- Partial Name - Cannot contain any part of your full name.
- Dictionary - Cannot be solely based on a word in the dictionary (weak).

Current Password  **i** This value is required.

New Password

Confirm Password

**Change**

After clicking CHANGE, you will be taken back to the login page where you will log in with your username and new password.

After your first-time login, you will be directed to set up security questions.

These can be used to reset your password in the future.

Once you fill them in, click SUBMIT.

### Security Questions

1 Please select and answer questions from the options provided below.

2 Security questions are required for password recovery and to log in from an unsecure location.

Question 1:

Answer 1:

Question 2:

Answer 2:

Question 3:

Answer 3:

**Submit**

You will then be taken to the CareAlign® Portal landing page.

KHIN Messaging | Jennifer LaForce KONZA Support Desk Manager | Help Clear Lock Log Out

**KONZA**  
NATIONAL NETWORK

PL: PC: MG: ADM:

Menu Search

- Patient Lists
- Inpatient Lists
  - My Inpatient Lists
  - Rounding List
- Additional Patient Lists
- Manage Lists
- Secure Messaging
- Links
- Customize
- Tools

## Portal Search Functions and Navigation:

Select the SEARCH tab on the left side of the portal

All searches will require the Big 4 to complete a search

- First Name, Last Name, Date of Birth, Sex
- MRN and Optional Demographics information may be entered if you want to ensure that all other connections are also searched, like eHealth eXchange.

1. Search Tab: Click this to access the HIE
2. Patient Last Name
3. Patient First Name
4. Date of Birth
5. Sex (M/F/U)
6. Choose the Purpose of Use for accessing this patient's records per the definitions listed below. Note when querying for a patient, health plans and other non-treatment providers that use the Operations Purpose of Use may not receive responses from some organizations in the drop-down list.

Code	Display	Definition
COVERAGE	Coverage	Disclosures for insurance or disability coverage determination
OPERATIONS	Operations	Healthcare Operations
PAYMENT	Payment	Payment
PUBLICHEALTH	Public Health	Uses and disclosures for public health activities.
REQUEST	Request	Request of the Individual
TREATMENT	Treatment	Treatment

7. You can enter optional demographics, such as city and zip to ensure it searches the eHealth eXchange (eHX) connections.
8. At the bottom of the Optional Demographics section is a drop-down box. It defaults to the CareAlign Exchange. You can select a specific eHX facility in the drop-down menu if you only want to search that specific facility. (This is optional, information below)
9. Search

Search results will display 2 “bands” showing the searched patients information.

The screenshot displays the search results interface. On the left, there is a search filter with the following sections:

- Patient Identifiers:** MRN (input field)
- Patient Demographics:** Last (testpatient), First (stc), SSN (input field), DOB (07 / 08 / 1991), Sex (Female)
- Optional Demographics:** Mid Nm (input field), Addr (input field), City (input field), State (dropdown), Zip (input field), Phone (input field), Email (input field)
- Exchange: CareAlign Exchange (dropdown)

At the bottom of the filter are 'Clear' and 'Search' buttons. The search results on the right show two bands:

- Band 1:** STC TESTPATIENT, 07-08-1991 (31 Years Old), 0bfeb48b-dc97-47f6-918b-6c4727a43bcb @ CareAlign Exchange
- Band 2:** Stc Testpatient, 07-08-1991 (31 Years Old), 590f40840564aa0f24fa9730 @ KONZA Network

The Band showing ‘@ CareAlign Exchange’ contains your facility information and that of organizations who share information directly with KONZA. It is divided into types of info.

- This is where you will go for most anticipated information

**STC TESTPATIENT**  
07-08-1991 (31 Years Old)  
0bfeb48b-dc97-47f6-918b-6c4727a43bcb @ CareAlign Exchange

The Band showing ‘@ KONZA Network’ is a consolidated CCDA that aggregates all of the patient information in the ‘@ CareAlign Exchange’ band for the last 12 months.

**Stc Testpatient**  
07-08-1991 (31 Years Old)  
590f40840564aa0f24fa9730 @ KONZA Network

Once you have selected the '@ CareAlign Exchange' Band this screen will appear. Defaulting to the 'XCA Results' tab.

Date	Document Type	Provider	Patient Info
06/17/2021	Continuity of Care Document (31.70 KB) Summarization of Episode Note	Cerner Corporation - Millennium Clinical Document Generator (Facility) Albany Surgical, P.C.	ZZ2887 @ 2.16.840.1.113883.3.7457.113941435.1.1
11/26/2020	Pediatric Associates Of Southwest Missouri, LLC Clinical Summary (39.70 KB) Summarization of Episode Note	Pediatric Associates Of Southwest Missouri, LLC	General Practice1882780444236520 @ 2.16.840.1.113883.3.432.0.16.1.100.622
09/02/2018	Continuity of Care Document (25.58 KB) Summarization of Episode Note	Cerner Corporation - Millennium Clinical Document Generator (Facility) Albany Surgical, P.C.	ZZ2887 @ 2.16.840.1.113883.3.7457.113941435.1.1
07/20/2018	Continuity of Care Document (26.41 KB) Summarization of Episode Note	Cerner Corporation - Millennium Clinical Document Generator (Facility) Albany Surgical, P.C.	ZZ2887 @ 2.16.840.1.113883.3.7457.113941435.1.1
11/07/2016	Continuity of Care Document (42.00 KB) Transfer of care referral	System Allscripts (0) Beloit Medical Center	Outpatient 123456789258 @ 1.3.6.1.4.1.22812.4.70908.0
11/10/2014	Continuity of Care Document (40.08 KB) Transfer of care referral	System Allscripts (0) Beloit Medical Center	Outpatient 123456789258 @ 1.3.6.1.4.1.22812.4.70908.0
06/20/2014	Continuity of Care Document (31.73 KB) Transfer of care referral	System Allscripts (0) Beloit Medical Center	Outpatient 123456789258 @ 1.3.6.1.4.1.22812.4.70908.0
11/22/2013	Personal Health Record (Extract) (21.92 KB) Transfer of care referral	System Allscripts (0) Beloit Medical Center	Outpatient 123456789258 @ 1.3.6.1.4.1.22812.4.70908.0
10/11/2013	Personal Health Record (Extract) (21.92 KB) Transfer of care referral	System Allscripts (0) Beloit Medical Center	Outpatient 123456789258 @ 1.3.6.1.4.1.22812.4.70908.0

The tabs will have the narrowed down information on them as they are titled

- ☞ XCA Documents (CCDs)
- ☞ HL7 Documents (Labs, Progress Notes, ect)
- ☞ Allergies
- ☞ Immunizations
- ☞ Labs (All individually) ☞ Fast Labs (results in 6 month intervals)
- ☞ Medications
- ☞ Procedures/Diagnoses
- ☞ Visits
- ☞ CCD

## eHealth eXchange (eHX) Data Search:

eHX is a group of organizations that are connected to the national eHealth eXchange data network. This information is available to KONZA and requires a separate search, if these are the only documents you want to view.

The screenshot shows the KONZA National Network portal interface. At the top, there is a navigation bar with the KONZA logo and the text "NATIONAL NETWORK". To the right, it says "Jennifer LaForce KONZA Support Desk Manager". Below this, there are buttons for "PL:", "PC:", "MG:", and "ADM:". The main content area is titled "Messages 0 / 2" and has a "Menu" and "Search" tab. Under the "Search" tab, there is a "Patient Identifiers" section with an "MRN" input field. Below that is a "Patient Demographics" section with fields for "Last" (Chdrzztestpatient), "First" (chdrthree), "SSN", "DOB" (03 / 03 / 1962), and "Sex" (Female). There is also an "Optional Demographics" section with fields for "Mid Nm", "Addr", "City" (la jolla), "State", "Zip" (92038), "Phone" (8585555555), and "Email". At the bottom of the form, there is a "CareAlign Exchange" dropdown menu that is open, showing a list of organizations including Advent Health System, Advocate Aurora Health Care, Alabama One Health Record, Allegheny Health Network, Anmed Health, Ardent Health Services, Arkansas SHARE, Atlantic Health System, Baptist Memorial Health Care, Baylor College of Medicine, Bon Secours, Boston Medical Center, Carle Foundation Hospital, Centura Health, Chesapeake Regional Information Systems, Children's Hospital of Colorado, Children's Hospital of Philadelphia, and Christus Trinity Mother Francis.

- Click “search”. The search can take up to a minute for the document to appear.
- Click on the title to open the document.

The page will open to a list of CCDs like this

05/24/2023	Continuity of Care Document ( )	Mercy Health - Arkansas, Oklahoma, Missouri (5400)Health Encounter Site
	Continuity of Care Document	Mercy Health - Arkansas, Oklahoma, Missouri
	Travel Summary ( )	Mercy Health - Arkansas, Oklahoma, Missouri (5400)Health Encounter Site
	Progress Note	Mercy Health - Arkansas, Oklahoma, Missouri
	Emergency Summary ( )	Mercy Health - Arkansas, Oklahoma, Missouri (5400)Mercy Hospital St Louis Emergen
	Progress Note	Mercy Health - Arkansas, Oklahoma, Missouri

Select the needed document to populate the CCD



**Special Considerations:**

- Only CCDs will be available with this type of search. You will have to search within the document(s) for specific information.
- Sometimes other HIE bands (i.e., Missouri Health Connect) may not populate due to timing out. Click “search” again if you know the patient has been seen in that state.
- If you do not retrieve needed data from ‘@ CareAlign Exchange’, choose another site in the drop-down menu that may contain data for that patient.

**Other Tools:**

- The refresh icon (located in the upper right-hand corner of the window or document) can be used to reload information that may have timed-out. 
- The maximize button (located in the upper right-hand corner of the window or document) can be used to make the window bigger. 
- Use the Clear button between patient searches to remove the previous patient’s information.



- Use the Lock button to keep your place in KHIN for three hours when you need to step away.



## Printing:

Click on the Printer icon on the right of any screen.  
Best results print using Chrome, Edge and FireFox browsers.



- Always handle PHI in compliance with HIPAA standards

## Security Override/Breaking the Glass:

The Secured Data indicator displays if a patient has secured clinical data to which you do not have access.

- If you have Security Override permissions, you can perform this function.
- If you do not have this permission, you will be unable to view the patient’s data.

This action is NOT recommended unless you have patient consent or in an emergency situation.

1. Search for the patient.

Patient Demographics

Last

First

SSN

DOB  /  /

Sex  ▼

2. Select the '@ CareAlign Exchange' band
3. If the patient’s data is secured you will see the Secured Data 'pill' at the top of the chart.



- You will click on the Lock symbol to begin the Security Override

4. You will be presented with the Security Override screen.

Security Override

⚠ You are trying to access secured data. This action will be reported and can be audited.

Choose override reason ▼

Cancel

5. Click on the drop-down to choose a reason you wish to complete the Security Override

Security Override

⚠ You are trying to access secured data. This action will be reported and can be audited.

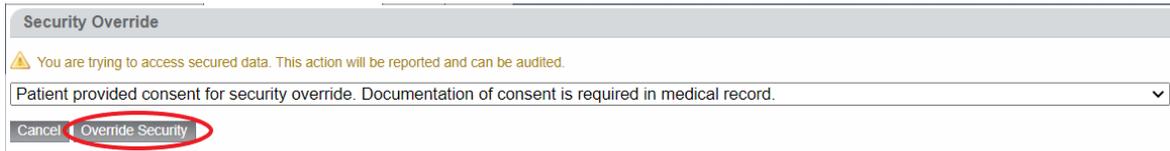
Choose override reason ▼

Choose override reason

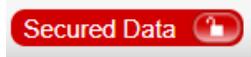
Patient provided consent for security override. Documentation of consent is required in medical record.

Patient DID NOT provide consent for security override. Documentation of need for security override without patient consent is required in medical record.

6. Click Override Security



7. The locked icon will now display as unlocked.



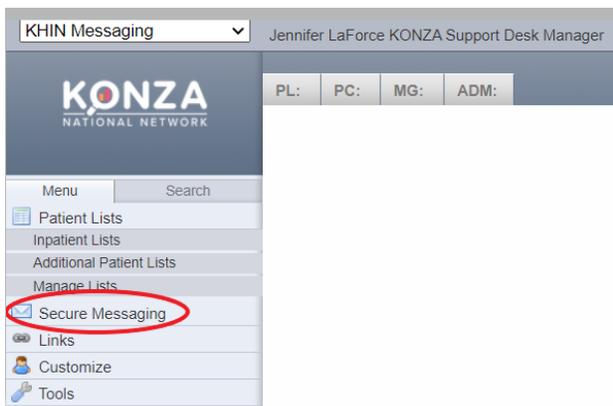
8. While the chart is unlocked, you will not be able to move to another tab until you lock it back.

Secure Messaging: (DIRECT)

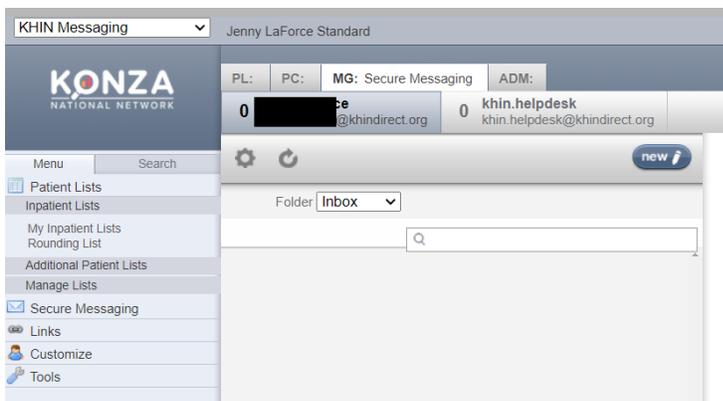
CareAlign’s HIPAA-compliant secure messaging system allows you to securely send and receive patient information across the healthcare information exchange community.

If you have access to Secure Messaging and have a mailbox, you are able to view, compose, send, and receive messages

Click on Secure Messaging on the left Menu tab



If you have access to more than one mailbox, you will see tabs for each one.

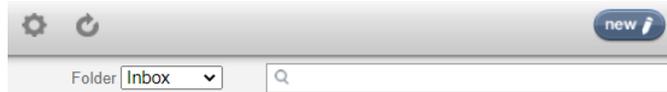


Click a message in the email list to display that email in the reading pane. If there is an attachment, click View or Download to access the attachment.

If you are anticipating a message you can click the refresh icon to manually refresh your mailbox and load any new messages. Your mailbox will also automatically refresh at regular intervals.



You can search for messages using key words (sender/receiver, or wording in the body of the message) with the search bar.



It is recommended to add a signature to your mailbox.

Select the gear symbol at the top of the mailbox



In the **User Setting** portion of the populated page enter the signature you would like to display on all new and reply messages

### User Settings

**Default Mailbox**  You do not have a default mailbox.

**Message Signature**

Thank you,

John Smith  
johnsmith@abc.com  
555-555-5555

### Sending a Message:

To send a message click the New button



**New Message** save cancel send

From: "Jenny LaForce" <jenny.laforce@chindirect.org>

To:

CC:

Subject:

Attachments + attachment

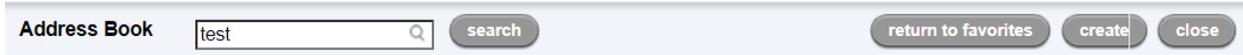
To reply or forward to a message you can select

- A. Reply to the sender
- B. Reply to all
- C. Forward the email to another recipient
- D. Print the thread



You will enter the DIRECT address of the person you would like to send to.

- Possible matches will auto-populate as you begin typing an address in the To field
- You can click on the Index Card to go to the address book to search for an address
  - You can search by any defining key words to find the intended contact
    - (Name, address, facility, ect.)



- You can select the Index card next to their name to add them in the To field of your current message
- You can select the heart icon to add the user to your favorites list for easy access later

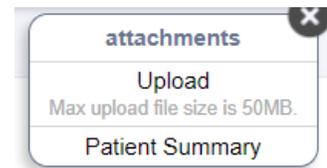


### Adding an Attachment:

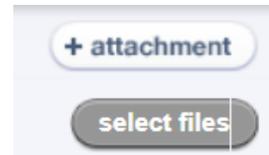
You will see two (2) options for adding an attachment



Upload and Patient Summary



To upload a file from your computer or network: Choose **Upload** and then click **select files**. Choose a document(s) that resides on your computer or network. You may attach multiple files.



To attach a patient summary from the exchange: Choose **Patient Summary** and begin typing the name of the patient.

- Choose which CCD you want to attach based on the MRN and information shown
- Select **attach**

Choose a patient:

- Testpatient, Stc (000897@KHIN Messaging) 07/08/1991 - F



### Archiving Messages:

Select the check box at the front of the message you want to move out of your inbox

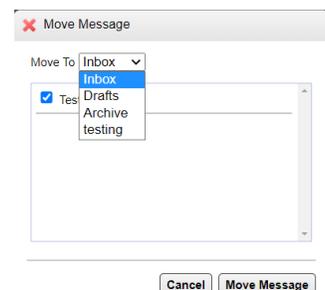


Click the folder symbol that populates at the top of your mailbox



A box will pop up where you can choose with folder to move your message to

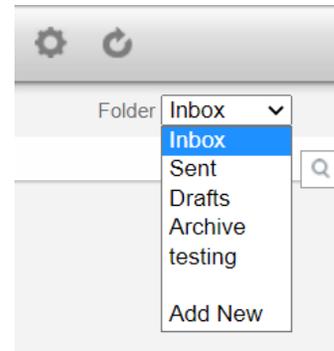
Click move message



## Archived Messages:

You can click on the **Folder** drop down to view a list of folders in your mailbox.

- Select one to view to messages in that folder
  - Inbox: Holds all incoming message threads.
  - Sent: Holds all outgoing messages that have been sent.
  - Archive: You can move messages to this folder after reading them to keep your inbox clean
  - Drafts: Holds draft emails that you have saved in your inbox to complete and/or send in the future.
  - Click Add Folder to create a new folder you can move messages to after reading.



*Messages cannot be permanently deleted. They can be moved to an Archive folder, but will still appear in threads in which they are referenced.*