



# Provider Portal Learning Guide



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# Getting started with the Provider Portal

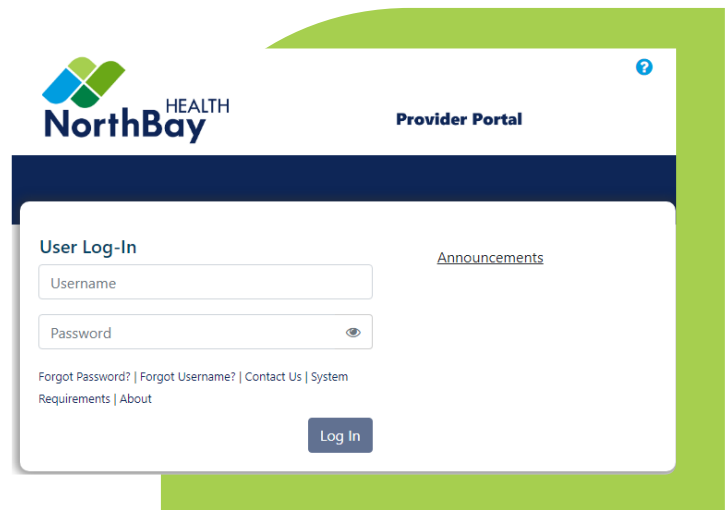
## How to Access:

**Note:** We recommend using Google Chrome when accessing the Provider Portal.

**Step 1:** Launch the site from:  
[NorthBay.org/ProviderPortal](https://NorthBay.org/ProviderPortal)

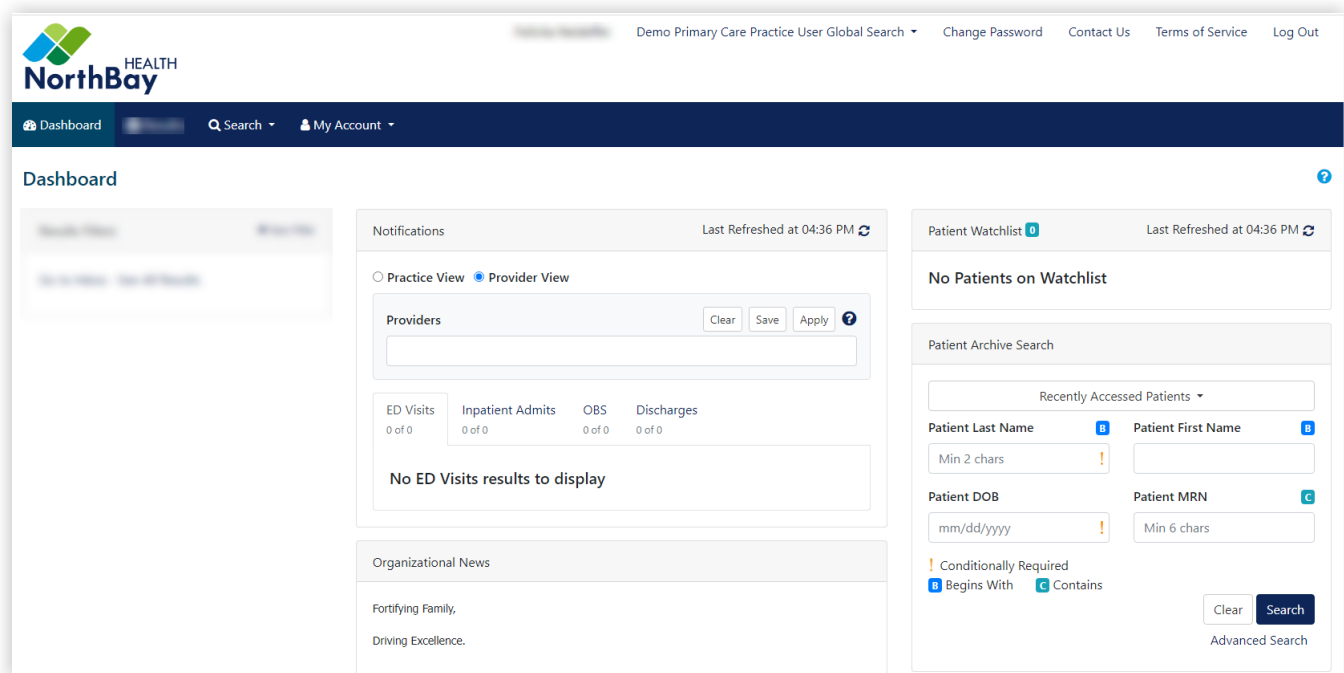
**OR:** Go directly to:  
[ProviderPortal.NorthBay.org/NorthBay#](https://ProviderPortal.NorthBay.org/NorthBay#/)

**Step 2:** Enter your username and password and click "Log In."



## Viewing the Dashboard:

After logging on to the Provider Portal, the following page will display. Your view is based on role. See "[Dashboard](#)" help page for more information.



## Searching for a Patient:

There are two search options available. See "[Patient Search](#)" help page for more information.

**Archive Search:** Allows you to find patients with an established relationship to the providers in your group or practice.

- Search options include: Partial last name and either date of birth, or last four digits of the patient's Social Security number.

**Global Search:** Gives you access to information on existing patients when you may not be the provider on record, and new patients with whom you may not have an existing relationship.

- Search options include: Partial last name and either date of birth, last four digits of the patient's Social Security number or Medical Record number.
- When prompted, user must select a search reason. If **OTHER** is selected, you will be required to enter a note before proceeding.

Search Reasons

**\*\*WARNING\*\*** YOU ARE ATTEMPTING TO ACCESS THE RECORD OF A PATIENT WITH WHOM YOU DO NOT HAVE AN IDENTIFIED RELATIONSHIP WITHIN THIS SYSTEM. By proceeding and checking the appropriate box below, you represent i) that you have a legally permissible reason to access this patient record and ii) that your selection accurately describes your relationship to the patient or patient record.

CONSULT - Physician ordering consult (enter physician name below)

INITIAL VISIT - You are being granted access to patient information for the purpose of treatment.

EMERGENCY TREATMENT

OTHER (comment required)

CANCEL - I no longer want to access this patient's information

You have selected a reason that requires further explanation. Please enter your reason in the text box.

Close OK

## Viewing Patient Data:

The following information can be accessed on the portal.

- **Patient Information:** Allows users to access the patient demographics, visit information, business face sheets, results, and documents. Also provides Admit, Discharge, and ER notifications.
- **Continuity of Care Document (CCD):** It includes the following sections, each of which contains several data elements: Summary of Episode Notes, Transition of Care and Discharge Summary. **Note:** Users can access the clinical summary documents once they have successfully completed the Global Search function.

The following information **cannot** be viewed on the portal. See "[How to Get Your Medical Records](#)" page for more information.

- **Scanned Documents:** Including downtime documents, ECGs, or physician notes.
- **Files that Exceed Size Limits:** Such as attachments, colonoscopy reports, and images. **Example:** Message that displays when reports/images exceed file size.

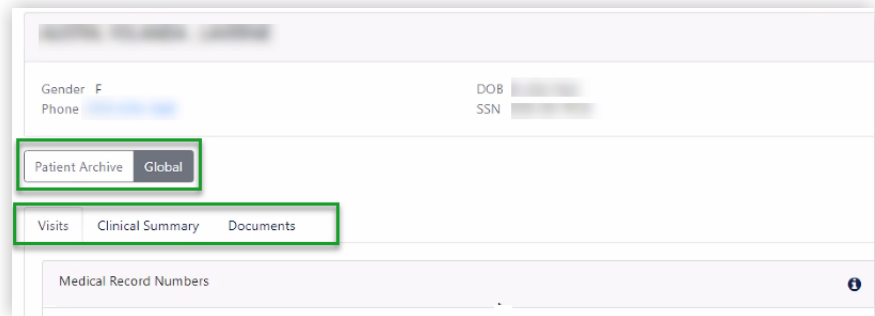
Please click on link to see image.  
Missing Attachment - attachment exceeds size limitation ATTACHMENT can be viewed in source system



## Patient Summary:

The Patient Summary contains information about the selected patient's encounters. They are view only. See "[Patient Summary Overview](#)" help page for more information.

**Note:** The tabs that are displayed depend on your access, and whether patient archive or global view is selected.



## Patient Summary Tabs

Tab	Description	View
<b>Clinical Summary</b>	Provides the following components of Consolidated Clinical Document Architecture (C-CDA); such as Allergies, Immunizations, Medications, and Problems.	Global view only
<b>Documents</b>	Contains all documents your practice or facility received pertaining to the patient.	Patient archive or global view
<b>Visits</b>	<p>Contains the selected patient's MRNs and associated source facility.</p> <p>Displays the Visit Type, Visit Date, Facility, Account Number, and Face Sheet (if still available).</p> <p>The following visit types may appear this area:</p> <ul style="list-style-type: none"> <li>• Inbox Message (M)</li> <li>• Inpatient (I)</li> <li>• Observation (V)</li> <li>• Outpatient (O)</li> <li>• Preadmit (P)</li> </ul> <p><b>Note:</b> Face sheets are typically available for 90 days. When the number of days is up, Unavailable is displayed in the Face Sheet column in the Visits grid. When "Unavailable" is displayed, you cannot view the face sheet.</p>	Patient archive or global view

# Patient Summary Documents:

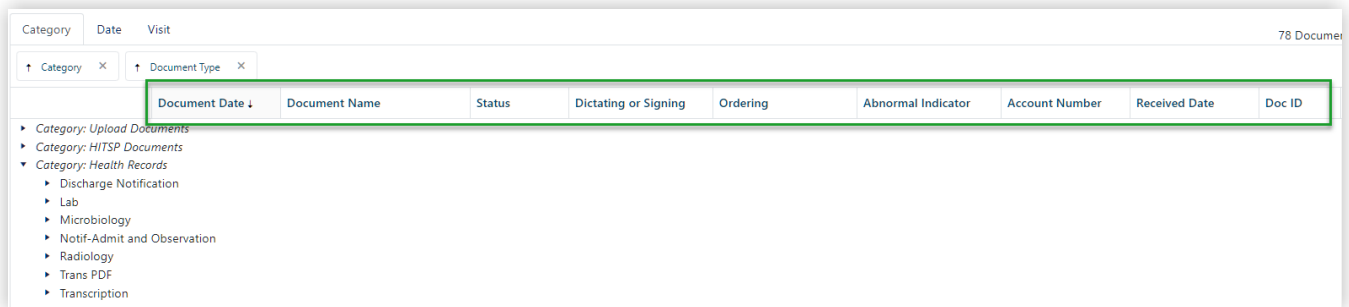
The Patient Summary Documents section will contain all documents in the patient's chart. See "[Patient Summary Overview](#)" help page for more information.

There are three views:

- **Category (default):** Grouped by category and document type; this is the best option for viewing documentation.
- **Date:** Grouped by Year, Month, and Document Date
- **Visit:** Grouped by Account Number

## Document View Layout

We recommend that you add the following columns to your view: Document Date, Document Name, Status, Dictating or Signing, Ordering, Abnormal Indicator, Account Number, Received Date, and Doc ID.



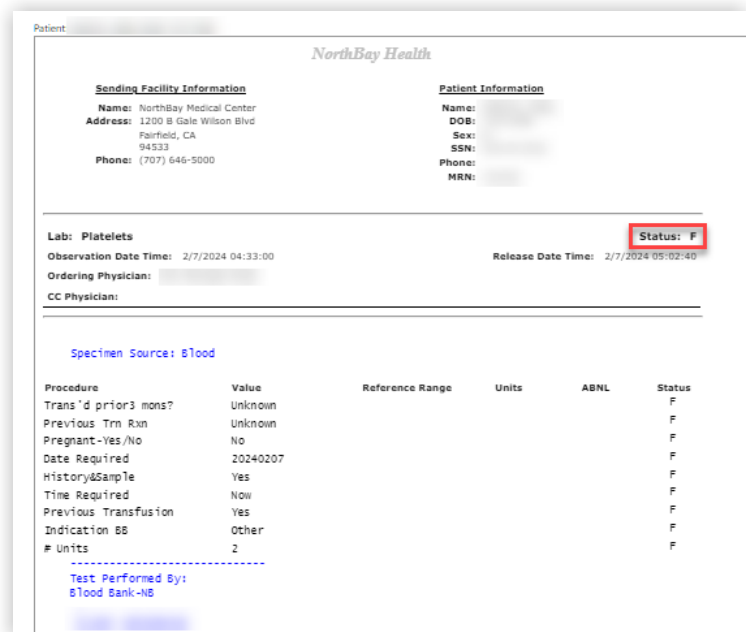
**Note:** Filtering by "Received Date" will help narrow the search results. By default, documents will display for the current month.

## Viewing a Document

Click on the **Doc ID** you would like to view. The document will open in a new window similar to the one shown to the right.

- **Header:** Contains patient demographic and name of the servicing facility.
- **Middle Section:** Provides information about the test, date and time, ordering physician, and status.
- **Body:** Contains the detailed results pertaining to the test or procedure.

Click the **Close or X** in the upper right corner to close the document.




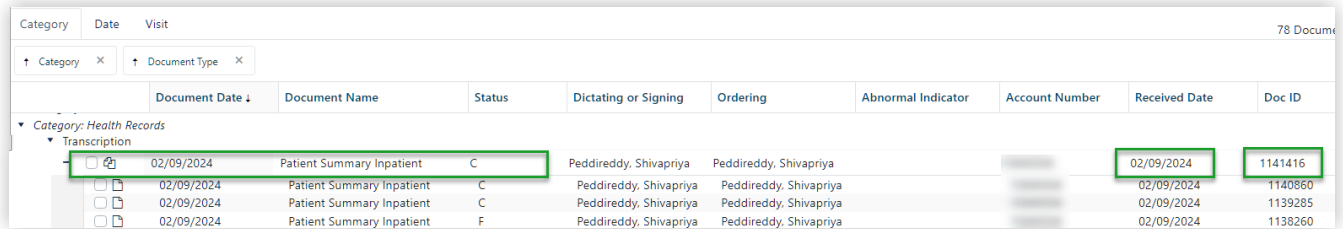
**Note:** The type of document that displays may vary depending on the source.







## Multiple Copies of Document

In some cases, multiple copies of the same document exist. This includes final, addendums, corrections, added calculations, late entries, in-error, canceled, or discontinued.

- **The most recent version** of the document is displayed next to the multiple documents  icon and will have the highest Doc ID in the grouping.

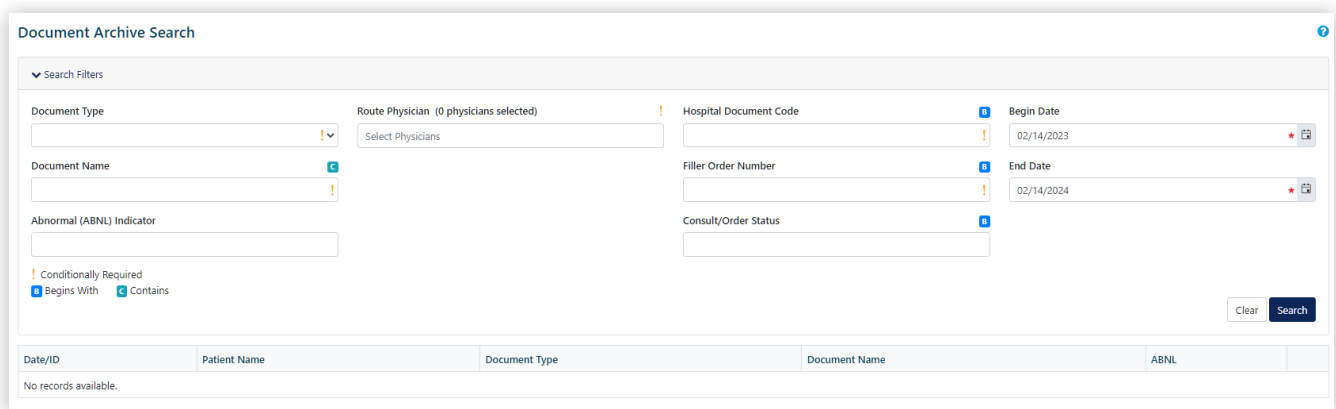


Category	Date	Visit							
Document Date	Document Name	Status	Dictating or Signing	Ordering	Abnormal Indicator	Account Number	Received Date	Doc ID	
<input checked="" type="checkbox"/> 	02/09/2024	Patient Summary Inpatient	C	Peddireddy, Shivapriya	Peddireddy, Shivapriya		02/09/2024	1141416	
<input type="checkbox"/> 	02/09/2024	Patient Summary Inpatient	C	Peddireddy, Shivapriya	Peddireddy, Shivapriya		02/09/2024	1140860	
<input type="checkbox"/> 	02/09/2024	Patient Summary Inpatient	C	Peddireddy, Shivapriya	Peddireddy, Shivapriya		02/09/2024	1139285	
<input type="checkbox"/> 	02/09/2024	Patient Summary Inpatient	F	Peddireddy, Shivapriya	Peddireddy, Shivapriya		02/09/2024	1138260	

**Note:** Always view the Status, Received Date, and Doc ID for checkpoints that you are viewing the most current version.

## Documents Archive Search

Document Search allows you to search for documents just within the specific document library using the drop-down options and filters. See "[Document Archive Search](#)" help page for more information.



Document Archive Search

Search Filters

Document Type:  | Route Physician: (0 physicians selected) | Hospital Document Code:  | Begin Date: 02/14/2023

Document Name:  | Filler Order Number:  | End Date: 02/14/2024

Abnormal (ABNL) Indicator:  | Consult/Order Status:

Conditionally Required:  Begins With  Contains

Clear Search

Date/ID	Patient Name	Document Type	Document Name	ABNL
No records available.				

## Viewing Results:

The Results can be accessed from either the Results Inbox, Patient Summary, or Documents (Category, Date, Visit). Some of the information that will populate include: Patient Name, Date of Birth, Diagnostic results, Laboratory and Pathology results, etc.

## Status Types

There are four status types:

Value	Description
<b>C</b>	<ul style="list-style-type: none"><li>• Correction of previously transmitted results.</li><li>• Always use the status marked "C" as it shows the most recent data.</li><li>• The word "Addendum" may or may not display in the body of the document or timestamps on the report.</li><li>• For Radiology reports, you will have to look at the timestamps located at the bottom of the document.</li></ul>
<b>E</b>	<ul style="list-style-type: none"><li>• In-Error, Canceled, or Discontinued results.</li><li>• Documents that are marked "In-Error" will have an "E" as the Status, however the first version of the document retains the "F" for final, which means the first version is incorrect.</li></ul>
<b>F</b>	<ul style="list-style-type: none"><li>• Final results (results stored and verified).</li></ul>
<b>P</b>	<ul style="list-style-type: none"><li>• Preliminary results (e.g. Microbiology).</li></ul>

## Abnormal Results

Any High or Low results will display a red **Y** icon in the Abnormal Indicator column

<input type="checkbox"/>		02/07/2024	BMP	F	<b>Y</b>
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There will be an "abnormal" flag of "**UNKN**" associated to all ABORh results. This is an internal indicator and is not a true Abnormal result. Please disregard.

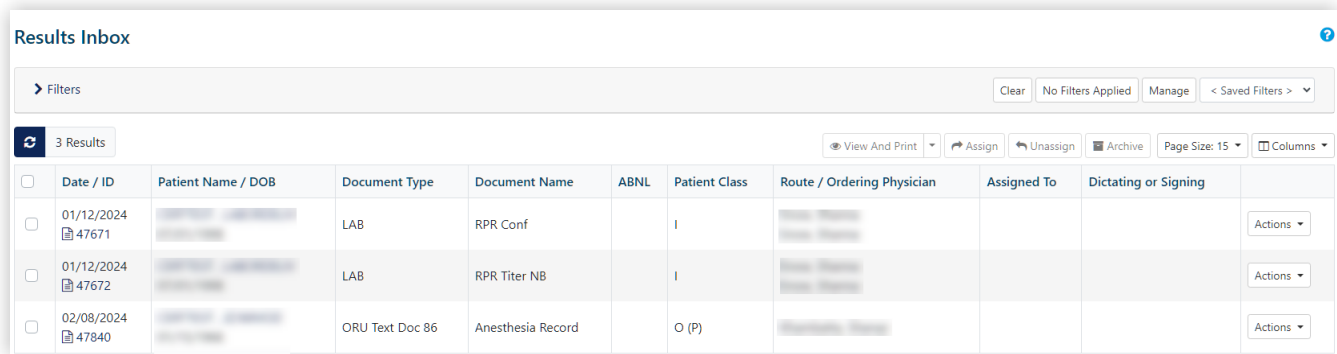
Procedure	Value	Reference Range	Units	ABNL	Status
D Weak Control	NR				F
Anti-B	0+				F
A1 cells	4+				F
D Weak Control CC	NR				F
ABORh - Patient	0 Pos			<b>UNKN</b>	F
Anti-AB	0+				F
B cells	4+				F



## Results Inbox

The Results Inbox allows you to view, print, filter, sort, assign, un-assign, make comments, and move results out of your inbox. See "[Results Inbox](#)" help page for more information.

- Results routing can include preliminary and final reports.
- Only patients with whom the provider has an established relationship will appear on the list.



<input type="checkbox"/>	Date / ID	Patient Name / DOB	Document Type	Document Name	ABNL	Patient Class	Route / Ordering Physician	Assigned To	Dictating or Signing	
<input type="checkbox"/>	01/12/2024 47671	[REDACTED]	LAB	RPR Conf		I	[REDACTED]			Actions
<input type="checkbox"/>	01/12/2024 47672	[REDACTED]	LAB	RPR Titer NB		I	[REDACTED]			Actions
<input type="checkbox"/>	02/08/2024 47840	[REDACTED]	ORU Text Doc 86	Anesthesia Record		O (P)	[REDACTED]			Actions

**Note:** The Result Inbox can hold 1,000 messages. When that limit is reached, the older messages will “fall off” to make room for the newer messages.

## Troubleshooting:

The following are common issues you may experience with the portal. See [Contact Us](#) for further assistance.

- **Forgot Password:** If you have an existing portal account, but forgot your password, you can reset the password by clicking on the Forgot password link. See "[Assisted Password Reset](#)" help page for more information.
- **Locked Account:** If your account is locked due to three unsuccessful login attempts, email the NorthBay Health IT Help Desk at [HelpDesk@NorthBay.org](mailto:HelpDesk@NorthBay.org).
- **Deactivated Account:** If you have attempted to log in and are receiving an error, your account may have been deactivated due to inactivity. For security purposes, your account will automatically be deactivated after **45 days** of inactivity. Email the NorthBay Health IT Help Desk at [HelpDesk@NorthBay.org](mailto:HelpDesk@NorthBay.org).
- **Unable to View Documents:** Make sure pop-up windows are enabled. If you are using a browser that offers pop-up control, you may need to complete steps to allow pop-ups so portal features will work.

## Frequently Asked Questions:

### Where Is the Refresh Button in Provider Portal?

There is no refresh button in the Provider Portal. In order to view changes, you will need to close and reopen the patient record.

### Is there an option to print documents?

If you are authorized to view face sheets, you can print single or multiple documents using the Document Viewer or PDF print function. See "[Printing](#)" help page for more information. **Note:** Provider Portal does not support functions provided by your browser such as print, select all, and copy.


### The font is too small; how do I increase the size in the Provider Portal?

When viewing a PDF document, use the "+" or "-" to zoom in or out. For all other views, you can try using one of the following:

- **Keyboard**
  - To zoom in, press the plus key while holding down the "Control" key.
  - To zoom out, press the minus key while holding down the "Control" key.
- **Keyboard and Mouse**
  - Hold down the "Control" button on your keyboard.
  - To zoom in, roll the scroll wheel on your mouse forward.
  - To zoom out, roll the scroll wheel backward.
- **Chrome (Browser) top-right corner**
  - Click on the three-dot icon and locate Zoom on the list.
  - Click on the "+" icon to Zoom in; or to Zoom out, click the "-" icon.

## Provider Portal Assistance:

The following resources are available to assist you with the portal:

- **Video Tutorials:** See [Video Tutorials](#).
- **General Help:** See [Table of Contents](#).
- **Help Icon:** Select the help icon  throughout the portal for context-based [Help](#). Help topics are context-aware and based on the portal function you are accessing.
- **Further Assistance:** See [Contact Us](#) for further assistance.

