

# **Reference Guide**

## **Patient Health Tool Navigation for Tufts Health Unify**

## Overview

The Patient Health tool is accessible through the secure Provider [portal](#) and allows providers to add and view a member's care plan as well as the member's medical and demographic information.

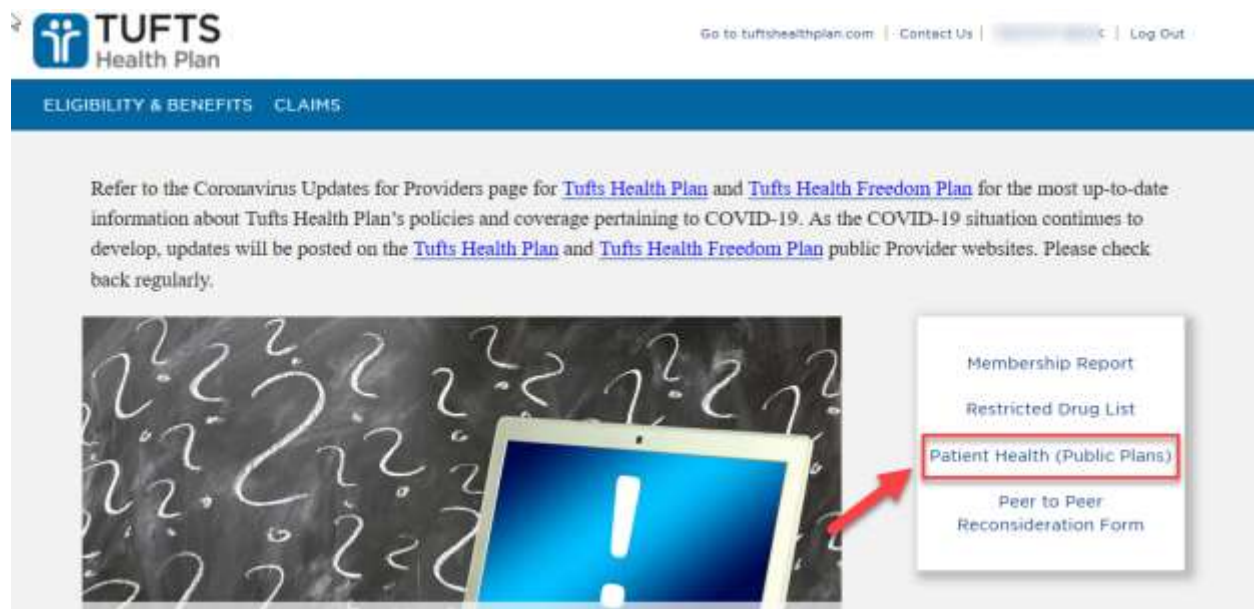
**Members Grant Access for Patient Health Tool:** Members must grant permission for Providers (other than their PCP) to access their information in the Patient Health Tool. Members can grant access by logging onto the secure Member portal, using the dropdown option go to Provider Permission, and click "Add."

**Note:** Care plans for members residing outside of Worcester County are located within the "Care Plan" section of Patient Health. Please refer to the "Documents" section to locate Care Plans for Worcester County members.

### ACCESSING THE PATIENT HEALTH TOOL

**Step 1:** Log into the secure Provider portal. Reference the [instructions for secure Provider portal registration](#) for additional information.

**Step 2:** Click "Patient Health (Public Plans)."



The screenshot shows the Tufts Health Plan provider portal interface. At the top left is the Tufts Health Plan logo. To the right of the logo are links for "Go to tuftshealthplan.com", "Contact Us", and "Log Out". Below the logo is a blue navigation bar with "ELIGIBILITY & BENEFITS" and "CLAIMS" in white text. The main content area has a grey background with a text block about COVID-19 updates. Below the text is a graphic featuring a chalkboard with question marks and a tablet with an exclamation mark. To the right of the graphic is a white navigation menu with a red box around the "Patient Health (Public Plans)" option and a red arrow pointing to it. The menu items are: Membership Report, Restricted Drug List, Patient Health (Public Plans), and Peer to Peer Reconsideration Form.

The following screen displays:

**TUFTS**  
Health Plan

Go to tuftshealthplan.com | Contact Us |  | Log Out

ELIGIBILITY & BENEFITS · CLAIMS

## Patient Health

The Patient Health tool allows members and providers to view a member's care plan as well as the member's central enrollee record (CER). The CER includes information on medical, prescription, functional, and social status. The Patient Health tool can be used to help facilitate communication among members and providers.

### Frequently Asked Questions

- [How Can I Obtain Permission To View Member Information?](#)
- [How Do I Add Information For My Member?](#)
- [Who Controls Information Within Patient Health?](#)

**MEMBER ID SEARCH**    **MEMBER NAME SEARCH**

Enter both provider and member information below. To search using Provider Name/ID and Member Name instead, use the Member Name Search above.

Provider Name/ID \*    Member ID\*    Suffix

   S123 or 123    ##    CLEAR    SEARCH

**Note:** Click any of the "Frequently Asked Questions" for additional information.

**Step 3:** From the Patient Health tool, view a member's information by searching either by Member ID or Member Name.

For Member ID Search, enter "Provider Name/ID" and "Member ID" and click "Search."

For Member Name search, click "Member Name Search" and select the appropriate member from the search results list.

**Note:** When the search results are returned, the user is navigated to the Care Plan section of the Patient Health tool. The Care Plan section is where all Care Plans are located for the requested member.

**Step 4:** After the search is executed, the Care Plan section is automatically viewable. When "Care Plan" is selected from the "Viewing" drop down options, care plans for members who do not reside in Worcester County (not affiliated with Cityblock), are visible.

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[< Back to member search](#)

Viewing

Care Plans

- Care Plans
- Central Enrollee Record
- Documents

ADD NOTE

Quick View (Downloadable)

Showing 1 out of 1 results.

Care Plan Name	Description	Care Plan Manager	Create Date	Status	Type	Active/Inactive
Unify Case Management	Unify Case Management	Cityblock Cityblock	Apr 02, 2020	Open	NWHD01	Active

Show 10 entries

Previous 1 Next

When the specific care plan is chosen, the following screen displays:

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[< Back to care plan selection](#)

Care Plan:  
**Unify Case Management**

Member: [Redacted]  
Provider: [Redacted]

**ADD NOTE**

**OVERVIEW** PROBLEMS GOALS INTERVENTIONS NOTES

<b>Created On:</b>	Apr 02, 2020	<b>Status:</b>	Open
<b>Care Plan ID:</b>	[Redacted]	<b>Contact Info:</b>	
<b>Care Manager:</b>	[Redacted]	<b>Sequence:</b>	1
<b>Plan Type:</b>	[Redacted]		

From the details screen of the Care Plan, view the member's goals, interventions, and any notes that have been added to the Care Plan. Choose "Overview," "Problems," "Goals," "Interventions," "Notes," to view additional information.

< [Back to care plan selection](#)

Care Plan:  
**Unify Case Management**

Member: [Redacted]  
Provider: [Redacted]

**ADD NOTE**

OVERVIEW **PROBLEMS** GOALS INTERVENTIONS NOTES

Showing 8 out of 8 results.

Description	Create Date	Start Date	End Date	Status	Sequence	Active/Inactive
Lack of PCP or specialist relationship may increase use of ED	Sep 03, 2019	Sep 03, 2019			500005	Active
Member at risk for high ED utilization	Sep 03, 2019	Sep 03, 2019	Feb 05, 2020		500004	Active
Member will not respond to outreach attempts by the care manager and or CHW	Apr 02, 2019	Apr 02, 2019	Sep 03, 2019		500003	Active
Patient does not have an annual dilated and comprehensive eye exam	Dec 03, 2019	Dec 03, 2019			500007	Inactive
Patient does not have follow-up appt with PCP	Dec 03, 2019	Dec 03, 2019			500008	Inactive
Patient has a history of chronic pain requiring NSAID use	Jun 16, 2017	Jun 16, 2017	Sep 03, 2019		500001	Inactive
Pt reports pain	Dec 03, 2019	Dec 03, 2019			500006	Inactive
Unable to reach the member to initiate care management process	Apr 02, 2019	Apr 02, 2019	Sep 03, 2019		500002	Active

**Step 5:** Click "Add Note" to add notes.

To view a Care Plan for a member residing in Worcester County, select "Documents" from the "Viewing" drop down. Click the document to open it.

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[< Back to member search](#)

Viewing

Documents

Care Plans

Central Enrollee Record

Documents

Document Name	Date
_04232020_140324.pdf	04/23/2020

The **Central Enrollee Record (CER)** contains information such as the Member's Health (medications, immunizations, surgeries, etc.), Visit & Procedures that the patient has had, and Patient History which includes family medical history and diseases.

To access Central Enrollee Record (CER), choose "Central Enrollee Record" from the "Viewing" drop down options.

When choosing "Central Enrollee Record," the following screen displays\*:

**\*Note:** There will be no data displayed in the tables unless the member or provider has added information.

Click "Add" at the top of each section to add information within the "Patient Health" tab and the "Visits and Procedures" tab.



Viewing  
Central Enrollee Record

Member: [Redacted]  
Provider: [Redacted]

PATIENT HEALTH VISITS & PROCEDURES PATIENT HISTORY

Medication

+ADD

Start	Medication	Prescribing Clinician	Dispensing Pharmacy	Medication Information	Notes
No data available in table					

Show 10 entries

Previous Next

Immunization

+ADD

Date	Immunizations	Status	Source	Notes
No data available in table				

Show 10 entries

Previous Next

Allergies

+ADD

Date	Allergan	Reaction	Reaction Onset	Source	Notes
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Within the "Patient History" tab, click "Edit" to provide details.



< Back to member search

Viewing  
Central Enrollee Record ▼

Member:   
Provider:

PATIENT HEALTH VISITS & PROCEDURES **PATIENT HISTORY**

EDIT

### Social History

Question	Answer
Smoking Tobacco Use	
Smokeless Tobacco Use	
Alcohol Use	
Drug Use	
Seat Belt Use	
Exercise	

### Family History

Condition	Mother	Grandmother	Grandfather	Father	Grandmother	Grandfather
Year Born						