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 following screen displays:

**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.
When the specific care plan is chosen, the following screen displays:
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.
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.
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.
Within the "Patient History" tab, click "Edit" to provide details.