



PULSE ENTERPRISE
END USER GUIDE

Welcome to Audacious Inquiry's PULSE Enterprise!

PULSE Enterprise is a cloud-based software solution built for public health and emergency management authorities and other organizations that solve critical gaps in patient care during public health emergencies and disasters.

PULSE Enterprise enables authorized users to access medication and clinical histories to improve direct patient care for individuals in non-routine care settings, such as shelters, medical surge sites, and other alternate care facilities. It can also be used to support public health activities, including epidemiological assessments, contact tracing, and clinical case augmentation.

Unlike patient care technologies solely focused on routine care, PULSE Enterprise is optimized for the unique demands of field conditions to reduce the burden on providers, support high quality care for patients, and accelerate the return to routine care. Verified health care personnel are granted secure access to patient health information through a simple and easy-to-use web portal, allowing them to find and view electronic patient health and medication histories from across national health information exchange networks.

Who Will Use This Guide?

PULSE User: this role can access the Patient Search portal to query for and view clinical documents and medication fill history for patients during a declared emergency.

Other Important User Roles

Tenant Administrator: this role can create and manage Events during an emergency, configure PULSE Enterprise using the Administrator Dashboard, retrieve reports, and perform User, Organization, Facility, and Source Management functions for all Organizations.

Event Administrator: this role can create and manage Events during an emergency for all Organizations.

Organization Administrator: this role can manage Events during an emergency and manage Users and Facilities/Locations within their own Organization, create new subordinate Organizations, and manage the Users and Facilities/Locations in those Organizations.

Organization Manager: this role can manage Users and Facilities/Locations within their own Organization.

Auditor: this role can generate Reports for user activity at a global level within the system.

Intake Coordinator: this role can access the Check-In and Check-Out screens to register individuals who have arrived at an alternate care facility and discharge them upon their departure.

Executive Sponsor: this role has the legal authority over system implementation in your state or jurisdiction.

PULSE ENTERPRISE END USER GUIDE
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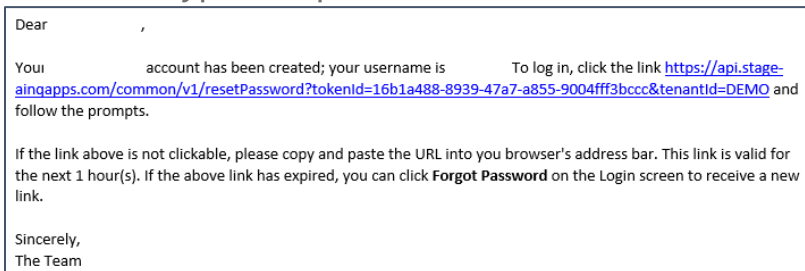
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ACCESS TO PULSE ENTERPRISE

First Time Login

1. To access PULSE, your Administrator must create a user account for you. Once your account has been created, you will receive an email notification. Within the email, select the hyperlink provided.



Dear ,

You account has been created; your username is . To log in, click the link <https://api.stage-ainqapps.com/common/v1/resetPassword?tokenId=16b1a488-8939-47a7-a855-9004fff3bccc&tenantId=DEMO> and follow the prompts.

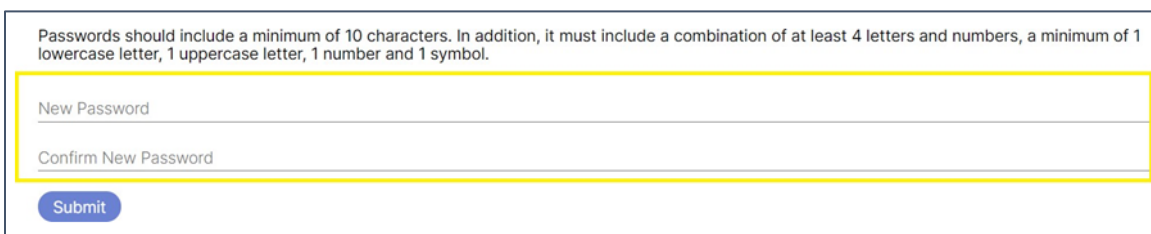
If the link above is not clickable, please copy and paste the URL into you browser's address bar. This link is valid for the next 1 hour(s). If the above link has expired, you can click **Forgot Password** on the Login screen to receive a new link.

Sincerely,
The Team

Tip! Make sure that the system email address **no-reply@ainqapps.com** will populate to your inbox, so that emails do not end up in your junk/spam folder.

Note: The link is only valid for an hour. If the link expires, follow the [Password Reset](#) process.

2. Create a password, noting password requirements:
Passwords must contain a minimum of 10 character(s), 1 number(s), 1 lowercase letter(s), 1 uppercase letter(s), and 1 symbol(s).



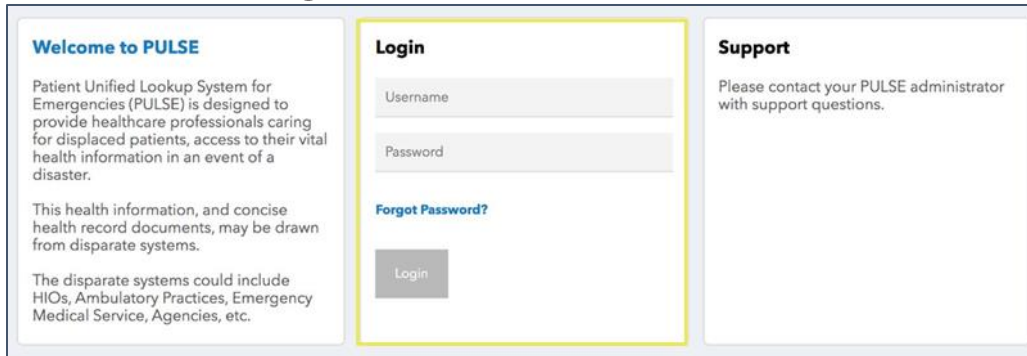
Passwords should include a minimum of 10 characters. In addition, it must include a combination of at least 4 letters and numbers, a minimum of 1 lowercase letter, 1 uppercase letter, 1 number and 1 symbol.

New Password

Confirm New Password

Submit

- Once you have successfully created your password, you will be directed to the PULSE login page. Enter your username and new password where indicated. When finished, select “Login”.



Welcome to PULSE

Patient Unified Lookup System for Emergencies (PULSE) is designed to provide healthcare professionals caring for displaced patients, access to their vital health information in an event of a disaster.

This health information, and concise health record documents, may be drawn from disparate systems.

The disparate systems could include HIOs, Ambulatory Practices, Emergency Medical Service, Agencies, etc.

Login

Username

Password

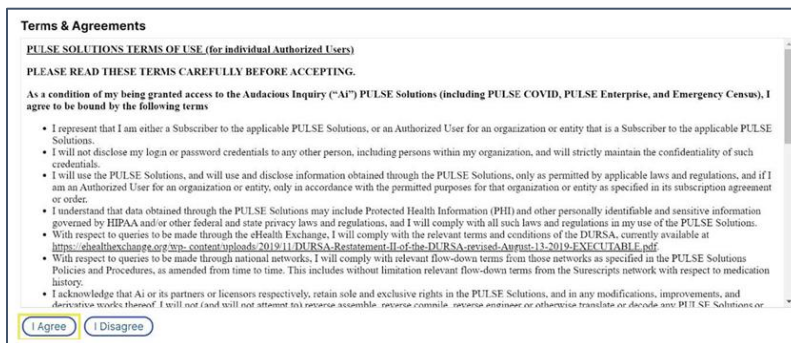
[Forgot Password?](#)

Login

Support

Please contact your PULSE administrator with support questions.

- You will then be directed to the PULSE Solutions Terms of Use, as shown below. Please read the Terms of Use for information regarding the legal uses of PULSE Enterprise (also available in [Appendix A](#)). To navigate to the next page, select the “I Agree” button at the bottom of the page.



Terms & Agreements

PULSE SOLUTIONS TERMS OF USE (for individual Authorized Users)

PLEASE READ THESE TERMS CAREFULLY BEFORE ACCEPTING.

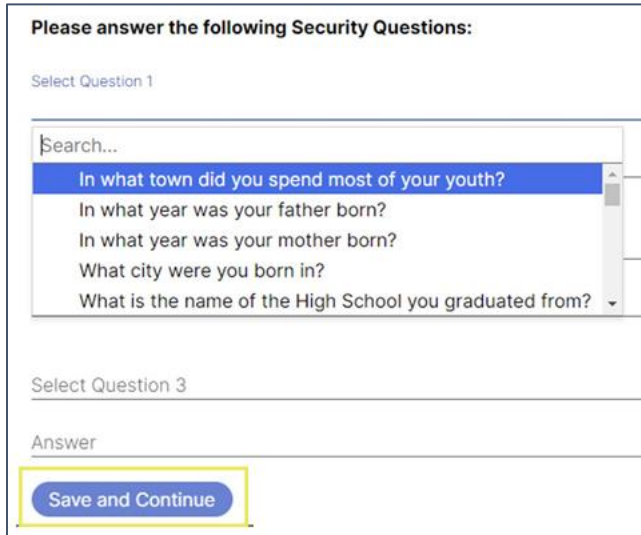
As a condition of my being granted access to the Audacious Inquiry (“AI”) PULSE Solutions (including PULSE COVID, PULSE Enterprise, and Emergency Census), I agree to be bound by the following terms

- I represent that I am either a Subscriber to the applicable PULSE Solutions, or an Authorized User for an organization or entity that is a Subscriber to the applicable PULSE Solutions.
- I will not disclose my login or password credentials to any other person, including persons within my organization, and will strictly maintain the confidentiality of such credentials.
- I will use the PULSE Solutions, and will use and disclose information obtained through the PULSE Solutions, only as permitted by applicable laws and regulations, and if I am an Authorized User for an organization or entity, only in accordance with the permitted purposes for that organization or entity as specified in its subscription agreement or order.
- I understand that data obtained through the PULSE Solutions may include Protected Health Information (PHI) and other personally identifiable and sensitive information governed by HIPAA and/or other federal and state privacy laws and regulations, and I will comply with all such laws and regulations in my use of the PULSE Solutions.
- With respect to queries to be made through the eHealth Exchange, I will comply with the relevant terms and conditions of the DURSA, currently available at <https://thehealthexchange.org/wp-content/uploads/2019/11/DURSA-Restatement-II-of-the-DURSA-revised-April-13-2019-EXCUTABLE.pdf>
- With respect to queries to be made through national networks, I will comply with relevant flow-down terms from those networks as specified in the PULSE Solutions Policies and Procedures, as amended from time to time. This includes without limitation relevant flow-down terms from the SureScripts network with respect to medication history.
- I acknowledge that Ai or its partners or licensors respectively, retain sole and exclusive rights in the PULSE Solutions, and in any modifications, improvements, and derivative works thereof. I will not (and will not attempt to) reverse assemble, reverse compile, reverse engineer or otherwise translate or decompile any PULSE Solutions or

You will be required to re-review and agree to the Terms of Use if your account gets reactivated after being inactivated or when the Terms of Use language has been updated by Audacious Inquiry or your Administrator.

- You will be directed to the Security Questions Page. Select three security questions from the drop-down options and enter your responses into the “Answer” field.

Once completed, select the “Save and Continue” button. These security questions will be used if you forget your password in the future and need to reset it.

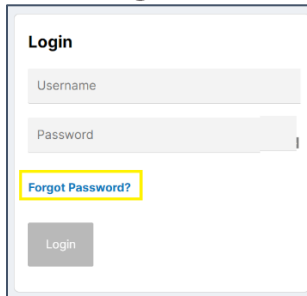


The screenshot shows a web form titled "Please answer the following Security Questions:". It contains three sections: "Select Question 1", "Select Question 3", and "Answer". The "Select Question 1" section has a search bar with a dropdown menu showing five options: "In what town did you spend most of your youth?", "In what year was your father born?", "In what year was your mother born?", "What city were you born in?", and "What is the name of the High School you graduated from?". The "Select Question 3" section is empty. The "Answer" section is empty. A yellow box highlights the "Save and Continue" button at the bottom of the form.

Note: Answers to the security questions are case sensitive.

Password Reset

1. To reset a forgotten password, navigate to the PULSE Enterprise homepage. Select the “Forgot Password” button on the login screen.



Login

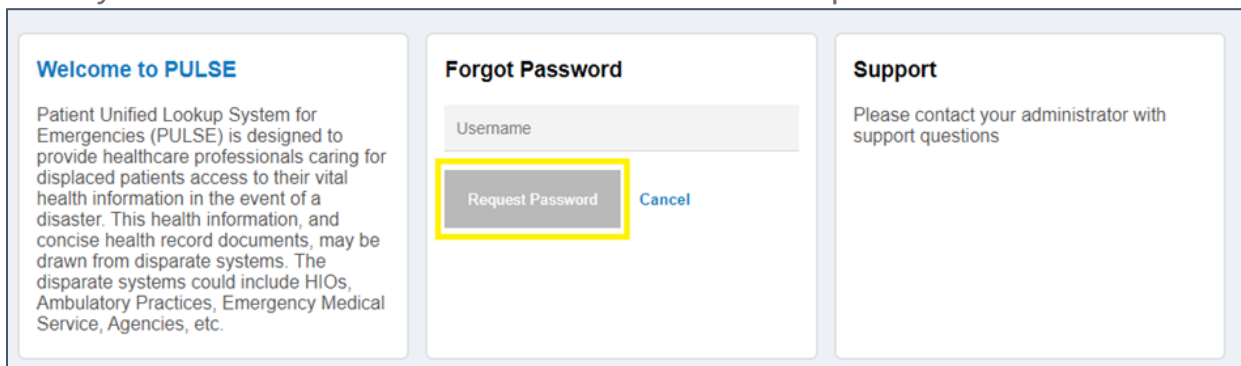
Username

Password

Forgot Password?

Login

2. Enter your username where indicated and select “Request Password”.



Welcome to PULSE

Patient Unified Lookup System for Emergencies (PULSE) is designed to provide healthcare professionals caring for displaced patients access to their vital health information in the event of a disaster. This health information, and concise health record documents, may be drawn from disparate systems. The disparate systems could include HIOs, Ambulatory Practices, Emergency Medical Service, Agencies, etc.

Forgot Password

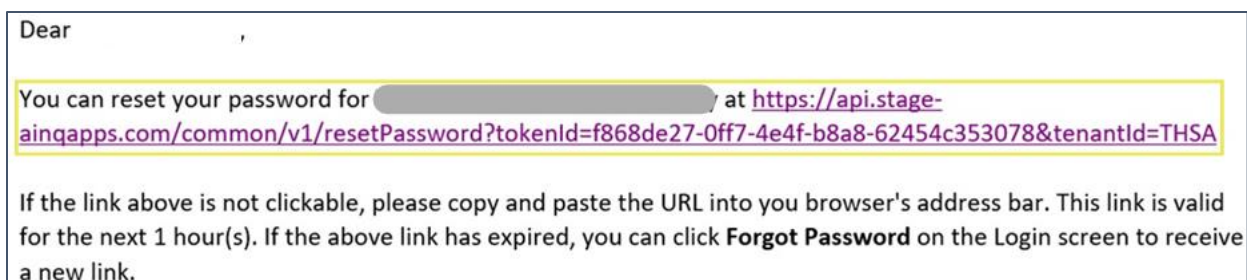
Username

Request Password Cancel

Support

Please contact your administrator with support questions

3. You will receive an email titled “Request to Reset Password”. Select the hyperlink within the email.



Dear ,

You can reset your password for [redacted] at <https://api.stage-ainqapps.com/common/v1/resetPassword?tokenId=f868de27-0ff7-4e4f-b8a8-62454c353078&tenantId=THSA>

If the link above is not clickable, please copy and paste the URL into you browser's address bar. This link is valid for the next 1 hour(s). If the above link has expired, you can click **Forgot Password** on the Login screen to receive a new link.

4. This will bring you to a page asking for the answer to one of the security questions you set up during the account creation process. Type in your answer. When finished, select “Next”.




Please answer the following Security Question:

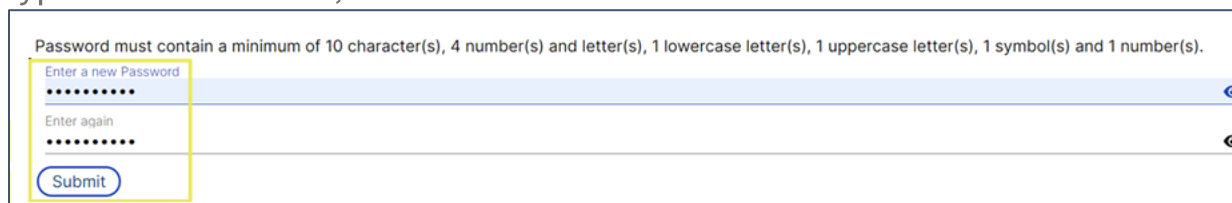
What city were you born in?

Answer

Next

If a User forgets their security questions, an Administrator can reset their account. Resetting a user account allows the user to choose new security questions.

5. If you successfully answer the security question, you will be redirected to the Set Password screen, where you can create a new password (following the password instructions for length and type of character). Press  to view the password you typed. When finished, select “Submit”.



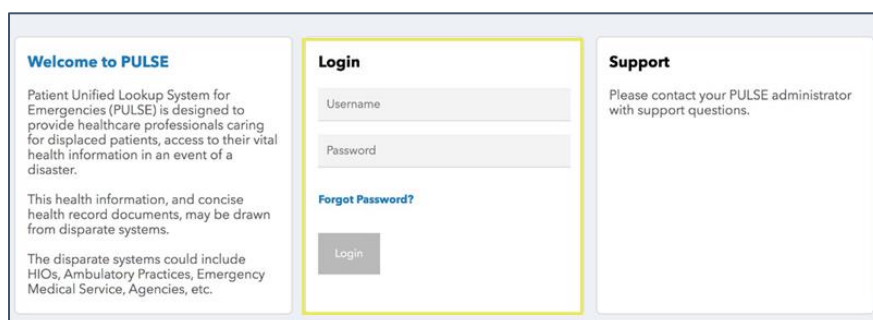
Password must contain a minimum of 10 character(s), 4 number(s) and letter(s), 1 lowercase letter(s), 1 uppercase letter(s), 1 symbol(s) and 1 number(s).

Enter a new Password

Enter again

Submit

6. After selecting “Submit”, you will be redirected to the PULSE login screen where you can enter your new password along with your username.



Welcome to PULSE

Patient Unified Lookup System for Emergencies (PULSE) is designed to provide healthcare professionals caring for displaced patients, access to their vital health information in an event of a disaster.

This health information, and concise health record documents, may be drawn from disparate systems.

The disparate systems could include HIOs, Ambulatory Practices, Emergency Medical Service, Agencies, etc.

Login

Username

Password

[Forgot Password?](#)

Login

Support

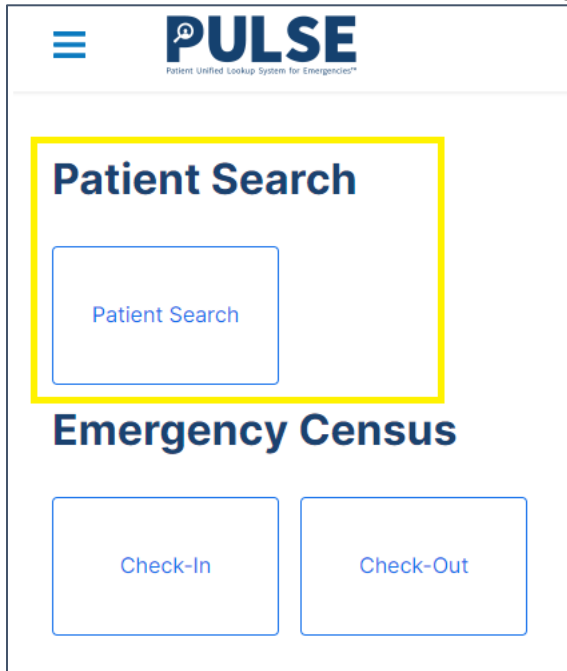
Please contact your PULSE administrator with support questions.

7. The Password Reset workflow is available for users who have forgotten their password, but still know their username. If you forget both your username and password, please contact your Administrator for assistance.

PULSE ENTERPRISE END USER GUIDE
PATIENT SEARCH

Accessing the Portal

1. Once logged in, you will be directed to a Dashboard to select the application you want to access. All PULSE Users are given access to Patient Search.



If you have also been assigned the role of Intake Coordinator, you will also see Emergency Census Check-In and Check-Out. Please refer to the [Emergency Census User Guide](#) for further detail.

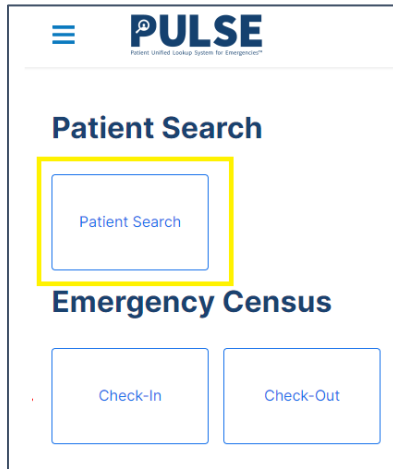
2. You may use the Hamburger Menu  to navigate to other functions of the PULSE system.



Click on  to reset your password and  to log out of the PULSE system.

Navigate to Patient Search

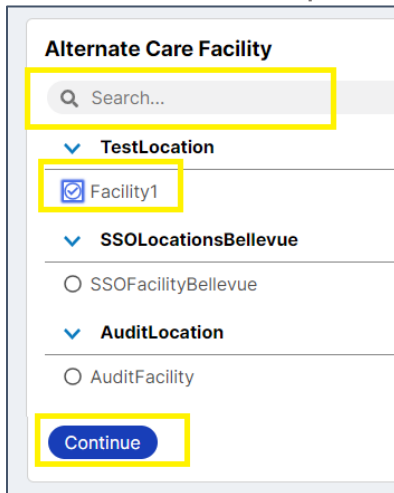
Select “Patient Search” to query for clinical information.



Alternate Care Facility (ACF) Selection

You will first be asked to select the Alternate Care Facility (ACF) where you are located. You may also be familiar with the term Alternate Care Site (ACS) or Medical Shelter.


1. Choose one of the suggested ACF locations, or search for the desired ACF using the search bar at the top of the list.



After you have selected the ACF, select “Continue” at the bottom of the page.

Note: If you have selected the incorrect ACF and selected “Continue”, logout and repeat the process to select the correct ACF.

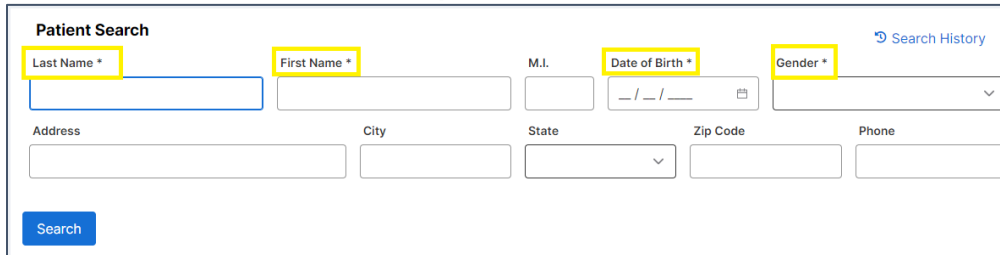
2. If you log in to PULSE and there are no available or active ACFs, you will receive a “No active locations available!” message and should contact your Administrator if you believe there is an issue.



Query for a Patient

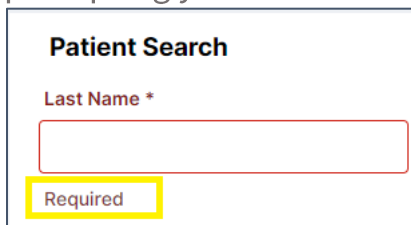
On the Patient Search Homepage, you can search for a patient's clinical information from the national health information networks and consolidated medication history through Surescripts®.

1. To search for a patient, enter the patient's demographic information into the appropriate Patient Search fields. Please note that Last Name, First Name, Date of Birth, and Gender are required (*) fields, however, to get the best matching results, please enter as much demographic information on the patient as possible.



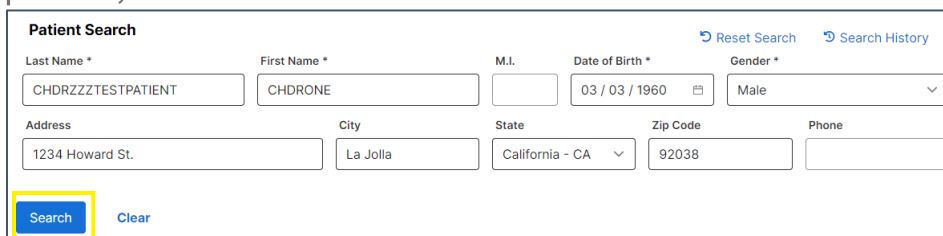
The form is titled "Patient Search" and includes a "Search History" link. It contains the following fields: Last Name * (highlighted), First Name * (highlighted), M.I., Date of Birth * (highlighted), Gender * (highlighted), Address, City, State, Zip Code, and Phone. A "Search" button is at the bottom left.

If you leave any required field empty, you will receive the following error message prompting you to fill in the missing information.



The form shows the "Patient Search" title and the "Last Name *" field, which is empty and outlined in red. Below the field is a yellow box with the text "Required".

2. When you are finished entering all available demographic information for the patient, select "Search".



The form is titled "Patient Search" and includes "Reset Search" and "Search History" links. It contains the following fields: Last Name * (CHDRZZTESTPATIENT), First Name * (CHDRNE), M.I., Date of Birth * (03 / 03 / 1960), Gender * (Male), Address (1234 Howard St.), City (La Jolla), State (California - CA), Zip Code (92038), and Phone. A "Search" button (highlighted) and a "Clear" button are at the bottom left.

- After selecting “Search”, the system will send the patient search query to your configured source organizations on the national health information networks.

If your Executive Sponsor or Administrator has provided a valid National Provider Identifier (NPI), the system will simultaneously send a query to Surescripts® to see if they have matching records for the patient and retrieve the associated medication history.

While the system performs this search, you will see a spinning icon titled “Retrieving Data”. Please allow up to 60 seconds for the search results to be returned.

Patient Search

Last Name * CHDRZZZTESTPATIENT First Name * CHDRONE M.I. Date of Birth * 03/03/1960 Gender * Male

Address 1234 Howard St City La Jolla State CA Zip Code 92038 Phone

Search Clear

Medications Documents

Retrieving data...

If a valid NPI was provided, you will first see the “Medications” tab, which includes data returned from the Surescripts® network. You can toggle to the “Documents” tab to see the results returned from the national health information networks.

Search Clear

Medications Documents

Q Search...

Data from Surescripts received on - 2020-11-19 10:54

Certain medications may be missing from the list below. You should independently verify medication history with the patient.

Medication	Fill Date	Written Date	Qty	Days	Refills	Prescriber	Pharmacy
LORazepam 2 mg tablet	11/17/2020	11/17/2020	60	30	0	Dolores Waterford-Fielding	Bannockburn Pharmacy
Fluaval Quadrivalent vaccine 0.5 ML prefilled syringe	11/15/2020	11/15/2020	1	-	-	-	Bannockburn Pharmacy
Vimpat 50 mg tablet Take 1 tablet by mouth twice daily	11/02/2020	11/02/2020	100	35	0	Dolores Waterford-Fielding	Bannockburn Pharmacy
Vimpat 50 mg tablet	11/02/2020	11/02/2020	100	35	0	Dolores Waterford-Fielding	Bannockburn Pharmacy
Cotempla XR-ODT 17.3 mg tablet	10/14/2020	10/14/2020	30	30	0	Dolores Waterford-Fielding	Bannockburn Pharmacy

Medication History

If there is a successful match on the Surescripts® network to your patient’s demographic information, their medication history will display in the Medications tab. The date the data was received will be displayed in green text on the “right-hand” side of the screen. Surescripts® displays the fill history of each medication, meaning that the medications displayed were filled at a pharmacy. The data will include the last 12 months of patient medication history.

Search

Clear

Medications

Documents

Q Search...

Data from Surescripts received on - 2020-11-19 10:54

Certain medications may be missing from the list below. You should independently verify medication history with the patient.

Medication	Fill Date	Written Date	Qty	Days	Refills	Prescriber	Pharmacy
LORazepam 2 mg tablet	11/17/2020	11/17/2020	60	30	0	Dolores Waterford-Fielding	Bannockburn Pharmacy
Flulaval Quadrivalent vaccine 0.5 ML prefilled syringe	11/15/2020	11/15/2020	1	-	-	-	Bannockburn Pharmacy
Vimpat 50 mg tablet <small>Take 1 tablet by mouth twice daily</small>	11/02/2020	11/02/2020	100	35	0	Dolores Waterford-Fielding	Bannockburn Pharmacy
Vimpat 50 mg tablet	11/02/2020	11/02/2020	100	35	0	Dolores Waterford-Fielding	Bannockburn Pharmacy
Cotempla XR-ODT 17.3 mg tablet	10/14/2020	10/14/2020	30	30	0	Dolores Waterford-Fielding	Bannockburn Pharmacy

Clinical History

1. If you toggle to the “Documents” tab, while the system performs the patient query, you will see a spinning icon titled “Retrieving Results” on the right hand side of the screen.

Patient Search

Last Name *

CHDRZZZTESTPATIENT

First Name *

CHDRONE

M.I.

Date of Birth *

03/03/1960

Gender *

Male

✕

Address

1234 Howard St

City

La Jolla

State

CA

Zip Code

92038

Phone

(760)222-5555

Search

Clear

Medications

Documents

Patient Search Results

Retrieving results...

Patient ↕	DOB ↕	Gender ↕	Address ↕	Phone ↕	Source ↕	Status ↕
<input type="checkbox"/> Chdrzzztestpatient, Chdrone	03/03/1960	Male	1234 Howard St, LA JOLLA, CA 92038-0000	+1 760-222-5555		
<input type="checkbox"/> CCHDRZZZTESTPATIENT, CHDRONE	03/03/1960	Male	1430 Eragon Way, ORLANDO, FL 32792		Guardian Health Services LLC GWPRD01	

Please allow up to 60 seconds for the search results to be returned.

If there is a successful match on the national health information networks to your patient’s demographic information, the responding source organizations will be listed under Patient Search Results. Source organizations use varying matching logics, so please input as much demographic information as possible to ensure the highest likelihood of a match.

- Search results will continue to populate as matches are returned from across the national health information networks. You may sort the results by Patient, Date of Birth (DOB), Gender, Address, Phone, and Source by using the arrows at the top of each field.

Patient Search

Last Name * CHDRZZZTESTPATIENT First Name * CHDRONE M.I. Date of Birth * 03/03/1960 Gender * Male ✕

Address 1234 Howard St City La Jolla State CA ✕ Zip Code 92038 Phone (760)222-5555

[Search](#) [Clear](#)

[Medications](#) [Documents](#)

Patient Search Results

Patient	DOB	Gender	Address	Phone	Source	Status
<input type="checkbox"/> CHDRZZZTESTPATIENT, CHDRONE	03/03/1960	Male	1234 Howard St, La Jolla, CA 92038	760-222-5555	HASA GWPRD01	
<input type="checkbox"/> CDHRZZZTESTPATIENT, CHDRONE	03/03/1961	Male	1234 HOWARD ST, LA JOLLA, CA 92038	760-222-5555	HealtheConnect Alaska GWPRD01	
<input type="checkbox"/> Chdrzzzttestpatient, Chdrone	03/03/1960	Male	1234 Howard St, LA JOLLA, CA 92038-0000	+1 760-222-5555	Children's Health System of Texas GWPRD01	
<input type="checkbox"/> ZZZChdrzzzttestpatient, Chdrone	03/03/1960	Male	1234 HOWARD ST, LA JOLLA, CA 92038-0000	+1 760-222-5555	Texas Health Resources GWPRD01	
<input type="checkbox"/> Chdrzzzttestpatient, Chdrone	03/03/1960	Male	1234 Howard St, LA JOLLA, CA	+1 760-222-5555	Tampa General	

- From the results listed, please select the patient record(s) that best fits the patient demographic information entered. For added accuracy, please attempt to get as much information from the patient as possible about their recent healthcare visits to verify the most up-to-date data.

[Medications](#) [Documents](#)

Patient Search Results [Clear Patient Selection](#)

Patient	DOB	Gender	Address	Phone	Source	Status
<input checked="" type="checkbox"/> CHDRZZZTESTPATIENT, CHDRONE	03/03/1960	Male	1234 Howard St, La Jolla, CA 92038	760-222-5555	HASA GWPRD01	
<input checked="" type="checkbox"/> CDHRZZZTESTPATIENT, CHDRONE	03/03/1961	Male	1234 HOWARD ST, LA JOLLA, CA 92038	760-222-5555	HealtheConnect Alaska GWPRD01	
<input checked="" type="checkbox"/> Chdrzzzttestpatient, Chdrone	03/03/1960	Male	1234 Howard St, LA JOLLA, CA 92038-0000	+1 760-222-5555	Children's Health System of Texas GWPRD01	
<input checked="" type="checkbox"/> ZZZChdrzzzttestpatient, Chdrone	03/03/1960	Male	1234 HOWARD ST, LA JOLLA, CA 92038-0000	+1 760-222-5555	Texas Health Resources GWPRD01	
<input type="checkbox"/> Chdrzzzttestpatient, Chdrone	03/03/1960	Male	1234 Howard St, LA JOLLA, CA	+1 760-222-5555	Tampa General	

[Retrieve Documents](#)

Please refer to the “Source” column to identify the facility returning the patient records if you are searching for a specific encounter.

- You may unselect the patient records by click on the “Clear Patient Selection” on the top right corner.

Medications

Documents

Patient Search Results

Clear Patient Selection

Patient	DOB	Gender	Address	Phone	Source	Status
<input checked="" type="checkbox"/> CHDRZZZTESTPATIENT, CHDRONE	03/03/1960	Male	1234 Howard St, La Jolla, CA 92038	760-222-5555	HASA GWPRD01	
<input checked="" type="checkbox"/> CDHRZZZTESTPATIENT, CHDRONE	03/03/1961	Male	1234 HOWARD ST, LA JOLLA, CA 92038	760-222-5555	HealtheConnect Alaska GWPRD01	
<input checked="" type="checkbox"/> Chdrzzztestpatient, Chdrone	03/03/1960	Male	1234 Howard St, LA JOLLA, CA 92038-0000	+1 760-222-5555	Children's Health System of Texas GWPRD01	
<input checked="" type="checkbox"/> ZZZChdrzzztestpatient, Chdrone	03/03/1960	Male	1234 HOWARD ST, LA JOLLA, CA 92038-0000	+1 760-222-5555	Texas Health Resources GWPRD01	
<input type="checkbox"/> Chdrzzztestpatient, Chdrone	03/03/1960	Male	1234 Howard St, LA JOLLA, CA 92038	+1 760-222-5555	Tampa General Hospital GWPRD01	

Retrieve Documents

Retrieve Documents

Clear Patient Selection

Query for a Document

1. When you have selected the patient results that are of interest to you, click “Retrieve Documents” at the bottom of the screen. A query will be sent to the national health information exchange networks to retrieve any patient documents available from the source(s) you selected.

Medications

Documents

Patient Search Results

Clear Patient Selection

Patient	DOB	Gender	Address	Phone	Source	Status
<input checked="" type="checkbox"/> chdrzztestpatient, chdrone	03/03/1960	Male	1234 Howard St , La Jolla, CA		HASA GWPRD01	
<input checked="" type="checkbox"/> C.DHRZZZTESTPATIENT, CHDRONE	03/03/1961	Male	1234 HOWARD ST, LA JOLLA, CA 92038	760-222-5555	HealtheConnect Alaska GWPRD01	Success
<input checked="" type="checkbox"/> Chdrzztestpatient, Chdrone	03/03/1960	Male	1234 Howard St, LA JOLLA, CA 92038	+1 760-222-5555	Tampa General Hospital GWPRD01	Success
<input checked="" type="checkbox"/> Chdrzztestpatient, Chdrone	03/03/1960	Male	1234 Howard St, LA JOLLA, CA 92038-0000	+1 760-222-5555	Children's Health System of Texas GWPRD01	Success
<input checked="" type="checkbox"/> Chdrzztestpatient, Chdrone	03/03/1960	Male	1234 Howard St., LA JOLLA, CA 92038	+1 760-222-5555	Franciscan Missionaries of Our	

Retrieve Documents

Note: the system will attempt to retrieve documents for up to 60 seconds, during which a spinning “Retrieving Date” icon will appear.

Retrieve Document

The information returned through the system includes data which is available for exchange among National Health Information Network Participants at the time of the query. This means that the response may not include the individual's full and complete medical history. Please use reasonable clinical judgment in interpreting the results of your Patient Search.

1. When the document query is complete, the results will be displayed under the Retrieved Documents heading.

Retrieved Documents					
<input type="text" value="Search..."/>		Certain clinical information may be missing from the list below. You should independently verify clinical history with the patient.			
Title ↕	Source ↕	Service Time ↕	Author ↕	Author Institution ↕	Type ↕
Continuity of Care Document	Health Encounter Site General Medicine		13100^Tampa General Hospital^&1.2.840.114350.1.13.259.2.7.3.688884.100&ISO^13100	Tampa General Hospital^&1.2.840.114350.1.13.259.2.7.3.688884.100&ISO^13100	Continuity of Care Document
Continuity of Care Document	Health Encounter Site General Medicine		3800^Children's Health System of Texas^&1.2.840.114350.1.13.194.2.7.2.688879&ISO	Children's Health System of Texas^&1.2.840.114350.1.13.194.2.7.3.688884.100&ISO^3800	Continuity of Care Document
Telephone Summary	DAL IS General Medicine	2020-04-18 00:00	3800^Children's Health System of Texas^&1.2.840.114350.1.13.194.2.7.2.688879&ISO	Children's Health System of Texas^&1.2.840.114350.1.13.194.2.7.3.688884.100&ISO^3800	Progress Note

2. You can use the "Search..." bar to search for a specific document within the returned results. Using the arrows at the top of the result columns, you can sort the retrieved documents by Title, Source, Service Time, Author, Author Institution, and Type.

Note: while we predict that each patient should have between one and ten documents, some patients may have zero documents, and some may have many.

All fields are populated based on information provided by the data source:

- **Title:** the name of the document generated
- **Source:** the name of the facility and department where the document was generated
- **Service Time:** if available, the date and time a service was rendered associated with the document
- **Author:** the name of the individual that authored the document, or else the author's location
- **Author Institution:** the location where the author generated the document, or the organization that provided the document
- **Type:** the type of document provided, according to the source organization

Retrieved Documents					
<input type="text" value="Search..."/>		Certain clinical information may be missing from the list below. You should independently verify clinical history with the patient.			
Title ↕	Source ↕	Service Time ↕	Author ↕	Author Institution ↕	Type ↕
Continuity of Care Document	Health Encounter Site General Medicine		13100^Tampa General Hospital^^^^^^&1.2.840.114350.1.13.259.2.7.2.688879&ISO	Tampa General Hospital^^^^^^&1.2.840.114350.1.13.259.2.7.3.688884.100&ISO^^^13100	Continuity of Care Document
Continuity of Care Document	Health Encounter Site General Medicine		3800^Children's Health System of Texas^^^^^^&1.2.840.114350.1.13.194.2.7.2.688879&ISO	Children's Health System of Texas^^^^^^&1.2.840.114350.1.13.194.2.7.3.688884.100&ISO^^^3800	Continuity of Care Document
Telephone Summary	DAL IS General Medicine	2020-04-18 00:00	3800^Children's Health System of Texas^^^^^^&1.2.840.114350.1.13.194.2.7.2.688879&ISO	Children's Health System of Texas^^^^^^&1.2.840.114350.1.13.194.2.7.3.688884.100&ISO^^^3800	Progress Note

3. To view a document, click on the name of the document in the left-hand column of the Retrieved Results (under the “Title” heading). While the system retrieves the document, you will see a spinning icon titled “Retrieving results”. Please note that the system will attempt to retrieve documents for up to 60 seconds.

Medications

Documents

Patient Search Results

[Clear Patient Selection](#)

Patient	DOB	Gender	Address	Phone	Source	Status
<input checked="" type="checkbox"/> CHDRZZZTESTPATIENT, CHDRONE	03/03/1960	Male	1234 Howard St., La Jolla, CA 92038		Alabama One Health Record GWPRD01	<input checked="" type="checkbox"/> Success

Retrieve Documents

Retrieved Documents

Certain clinical information may be missing from the list below. You should independently verify clinical history with the patient.

Title	Source	Service Time	Author	Author Institution	Type
Patient Summary	Health Authority General Medicine		^ALOHR	Alabama One Health Record	SUMMARIZATION OF EPISODE NOTE

- The document of interest will appear in a pop-up window once it has been retrieved. Depending on the type of document, it will contain various information.

In the example here, this Continuity of Care Document (CCD) shows patient demographic information, and may include Allergies, Medications, Active Problems, Social History, Last Filed Vital Signs, Plan of Treatment, and Results. To jump to a specific section, select the link to the category at the top of the document. Each category can be collapsed to reduce document length.

CHDRONE CHDRZZZ TESTPATIENT
Community Health and Hospitals: Health Summary
Generated on Jun 13, 2019

[Demographics](#)
[Allergies, Adverse Reactions & Alerts](#)
[Encounters](#)
[Immunizations](#)
[Medications](#)
[Problems](#)
[Procedures](#)
[Results](#)
[Social History](#)
[Vital Signs](#)
[Document Information](#)

Demographics
Male, DOB: Mar 3, 1960

Patient Address	Communication	Language	Race / Ethnicity
Primary Home: 1234 Howard St. LA JOLLA, CA 92036, US	Tel: (760)-222-5555	Unknown	Asian / Not Hispanic or Latino

Allergies, Adverse Reactions & Alerts

Group Description	Code System	Code	Code Description	Severity	Susceptibility	Date and Time	Status
Allergy to Eggs	UML	261P45F856	Eggs	Mild	Very susceptible	03-31-2010 10:00:00	Active
	ICD-9-CM	V15.03	Allergy to eggs				
Amikacin	RxNorm	905148	Amikacin Sulfate 50 MG/ML, Injectable Solution	Mild to moderate	Very susceptible	03-31-2010 10:00:00	Active
Penicillin V	NDF-RT	N0000011206	Penicillin V	Mild to moderate	Very susceptible	03-31-2010 10:00:00	Active

Encounters

Group Description	Code System	Code	Code Description	Date and Time	Status
Encounter Office Visit	CPT	99212	Office/outpatient visit, est	03-31-2010 10:00:00	Performed
Encounter Outpatient	CPT	99213	Office/outpatient visit, est	06-06-2010 10:00:00	Performed
	ICD-9-CM	V70.0	Routine general medical examination at a health care facility		
Encounter Acute Inpt	CPT	99251	Initial inpatient consult	06-06-2010 10:00:00	Performed
Encounter Office Visit	CPT	99212	Office/outpatient visit, est	06-25-2010 10:00:00	Performed
Encounter Outpatient	CPT	99213	Office/outpatient visit, est	10-27-2010 10:00:00	Performed
	ICD-9-CM	V70.0	Routine general medical examination at a health care facility		

Immunizations

Group Description	Code System	Code	Code Description	Date and Time	Status
Influenza Vaccine	CVX	135	Influenza, high dose seasonal	10-27-2010 10:00:00	Completed
Pneumococcal Vaccine all ages	CVX	100	pneumococcal conjugate PCV 7	10-27-2010 10:00:00	Completed
	CPT	90909	Pneumococcal vacc, pnc-s		

- Once you are finished with the document, click the “X” in the top right-hand corner of the window.

CHDRONE CHDRZZZ TESTPATIENT
Community Health and Hospitals: Health Summary
Generated on Jun 13, 2019

[Demographics](#)
[Allergies, Adverse Reactions & Alerts](#)
[Encounters](#)
[Immunizations](#)
[Medications](#)
[Problems](#)
[Procedures](#)
[Results](#)
[Social History](#)
[Vital Signs](#)
[Document Information](#)

Demographics
Male, DOB: Mar 3, 1960

Patient Address	Communication	Language	Race / Ethnicity
Primary Home: 1234 Howard St. LA JOLLA, CA 92036, US	Tel: (760)-222-5555	Unknown	Asian / Not Hispanic or Latino

Edit or Reset Patient Search

If you want to modify the patient search criteria you entered, you may edit them at any time and select “Search” again.

Patient Search

Last Name *

chdrzztestpatient

First Name *

chdrone

M.I.

Date of Birth *

03/03/1960

Gender *

Male

×

Address

1234 Howard St

City

La Jolla

State

CA

×

Zip Code

Phone

Search

Clear

Reset Search

Search History

Medications

Documents

Patient Search Results

Clear Patient Selection

Patient	DOB	Gender	Address	Phone	Source	Status
<input checked="" type="checkbox"/> Chdrzztestpatient, Chdrone	03/03/1960	Male	1234 Howard St, LA JOLLA, CA 92038-0000	+1 760-222-5555		
<input checked="" type="checkbox"/> Chdrzztestpatient, Chdrone	03/03/1960	Male	1234 Howard St, LA JOLLA, CA 92038	+1 760-222-5555		
<input checked="" type="checkbox"/> Chdrzztestpatient, Chdrone	03/03/1960	Male	1234 Howard St., LA JOLLA, CA 92038	+1 760-222-5555		

If you want to clear all the search criteria, you may select “Reset Search” on the top right corner. This will clear all fields and allow you to perform a new patient search.

Search History

Note: if your Administrator has disabled patient information caching, you will not see the “Search History” button on the screen. Please contact your Administrator if you have questions about the Search History functionality.

1. You can view previous searches by clicking the “Search History” link next to the Patient Search bar.

Patient Search

Last Name * CHDRZZTESTPATIENT First Name * CHDRONE M.I. Date of Birth * 03/03/1960 Gender * Male

Address 1234 Howard St City La Jolla State CA Zip Code 92038 Phone (760)222-5555

[Reset Search](#) [Search History](#)

[Search](#) [Clear](#)

[Medications](#) [Documents](#)

Patient Search Results

Retrieving results...

Patient	DOB	Gender	Address	Phone	Source	Status
<input type="checkbox"/> Chdrzztestpatient, Chdrone	03/03/1960	Male	1234 Howard St, LA JOLLA, CA 92038-0000	+1 760-222-5555		
<input type="checkbox"/> CCHDRZZTESTPATIENT, CHDRONE	03/03/1960	Male	1430 Eragon Way, ORLANDO, FL 32792		Guardian Health Services LLC GWPRD01	

2. On the Search History page, you can search for patients that have already been retrieved by users associated with your ACF by entering the patient’s name in the search bar. Please note, this information is cached at a default duration of 36 hours, so the Search History will not display any search conducted outside that timeframe.

Search History

[Back to Patient Search](#)

Q testerson

Patient Name	Date of Birth	Gender	Address	Phone	Last Accessed
Testerson, Testa	03/03/1960	Female			01/04/2021
Testerson, Test	03/03/1960	Male			01/04/2021

3. Selecting “Back to Patient Search” at the top right of the screen will return you to the full Patient Search page.

Search History

[Back to patient search](#)

Patient Name ⌵

Date of Birth ⌵

Gender ⌵

Address ⌵

Phone ⌵

Last Accessed ⌵

Please enter patient information in the search bar to retrieve results!

PULSE ENTERPRISE END USER GUIDE
DATA SOURCES

National Health Information Networks

PULSE Enterprise connects to National Health Information Networks (e.g., eHealth Exchange). Through PULSE Enterprise, public health and health care practitioners can send a query for “Message Content for Treatment”, and participating organizations respond to the query with relevant patient documents which may include health information such as medications, allergies, diagnoses, and lab results.

PULSE Enterprise participates in the eHealth Exchange as a Hub Initiator, meaning that PULSE Enterprise can send queries to other participants on the network, but it does not respond to queries. Simply put, PULSE Enterprise “pulls” information from the eHealth Exchange, but does not “push” information.

PULSE Enterprise can be configured to query different source organizations on the National Health Information Networks depending on your emergency response needs. Source organizations may be located in your state, or may be entities with national coverage, such as the Department of Defense, the Department of Veterans Affairs, Kaiser Permanente, MyDirective, CVS MinuteClinic, Fresenius, DaVita, and the Social Security Administration.

A full listing of participating eHealth Exchange organizations can be found [here](#).

PULSE ENTERPRISE END USER GUIDE
LEGAL CONSIDERATIONS

Legal Considerations

Administrators and End Users must follow all Federal, State, and Local laws. Additionally, all users must follow the below provisions to comply with the eHealth Exchange Data Use and Reciprocal Support Agreement (DURSA) and other applicable agreements.

1. Comply with all Applicable Law
2. Reasonably cooperate with the Subscriber (Audacious Inquiry) on issues related to the DURSA
3. Perform patient searches only for a Permitted Purpose ([Appendix B](#))
4. Use Message Content received from another Subscriber or Subscriber User in accordance with the terms and conditions of the Subscription Order
5. As soon as reasonably practicable after determining that an Adverse Security Event occurred, report such Adverse Security Event to the Subscriber
6. Refrain from disclosing to any other person any passwords or other security measures issued to the User by the Subscriber
7. Upon accepting the PULSE Solutions Terms of Use, you signify that you will comply with these terms

PULSE ENTERPRISE END USER GUIDE

APPENDIX A

PULSE SOLUTIONS TERMS OF USE (for individual Authorized Users)

PLEASE READ THESE TERMS CAREFULLY BEFORE ACCEPTING.

As a condition of my being granted access to the Audacious Inquiry (“Ai”) PULSE Solutions (including PULSE COVID, PULSE Enterprise, and Emergency Census), I agree to be bound by the following terms:

1. I represent that I am either a Subscriber to the applicable PULSE Solutions, or an Authorized User for an organization or entity that is a Subscriber to the applicable PULSE Solutions.
2. I will not disclose my login or password credentials to any other person, including persons within my organization, and will strictly maintain the confidentiality of such credentials.
3. I will use the PULSE Solutions and will use and disclose information obtained through the PULSE Solutions, only as permitted by applicable laws and regulations, and if I am an Authorized User for an organization or entity, only in accordance with the permitted purposes for that organization or entity as specified in its subscription agreement or order.
4. I understand that data obtained through the PULSE Solutions may include Protected Health Information (PHI) and other personally identifiable and sensitive information governed by HIPAA and/or other federal and state privacy laws and regulations, and I will comply with all such laws and regulations in my use of the PULSE Solutions.
5. With respect to queries to be made through the eHealth Exchange, I will comply with the relevant terms and conditions of the DURSA, currently available at [Data Use and Reciprocal Support Agreement \(DURSA\) - eHealth Exchange](#).
6. With respect to queries to be made through national networks, I will comply with relevant flow-down terms from those networks as specified in the PULSE Solutions Policies and Procedures, as amended from time to time. This includes without limitation relevant flow-down terms from the Surescripts network with respect to medication history.
7. I acknowledge that Ai or its partners or licensors respectively, retain sole and exclusive rights in the PULSE Solutions, and in any modifications, improvements, and derivative works thereof. I will not (and will not attempt to) reverse assemble, reverse compile, reverse engineer or otherwise translate or decode any PULSE Solutions or any part thereof.
8. If I am an Authorized User for an organization or entity, I acknowledge that I have no greater rights or remedies against the Ai or its partners, licensors, or service providers than are available to that organization or entity.
9. Except as restricted in an applicable agreement between Ai and the organization or entity that I represent, Ai may suspend or terminate my access to the PULSE Solutions at any time and for any reason, including but not limited to my use of the PULSE Solutions for unpermitted purposes or other violations of these Terms of Use.
10. In addition to any disclaimers and limitations specified in the DURSA, I expressly acknowledge that, except to the extent that the following disclaimers and limitations are prohibited or limited by law:

- a. THE PULSE SOLUTIONS ARE PROVIDED TO ME “AS IS”. AI AND ITS THIRD-PARTY PARTNERS, LICENSORS, AND PROVIDERS HEREBY DISCLAIM ALL EXPRESS OR IMPLIED WARRANTIES INCLUDING BUT NOT LIMITED TO ANY IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, TITLE, NON-INFRINGEMENT AND QUALITY. AI AND ITS THIRD-PARTY PARTNERS, LICENSORS, AND PROVIDERS MAKE NO REPRESENTATIONS OR WARRANTIES REGARDING THE RELIABILITY, AVAILABILITY, TIMELINESS, SUITABILITY, ACCURACY OR COMPLETENESS OF THE SERVICES OR THE RESULTS THAT I OR THE ORGANIZATION OR ENTITY I REPRESENT MAY OBTAIN BY USING THE SERVICES.
 - b. WITHOUT LIMITING THE GENERALITY OF THE FOREGOING, AI AND ITS PARTNERS, LICENSORS, AND SERVICE PROVIDERS DO NOT REPRESENT OR WARRANT THAT THE OPERATION OR USE OF THE PULSE SOLUTIONS WILL BE TIMELY, UNINTERRUPTED OR ERROR-FREE. IN PARTICULAR, (I) AI DOES NOT WARRANT AGAINST POSSIBLE ERRORS OR MISMATCHES WHEN MATCHING PATIENT IDENTITIES BETWEEN DISPARATE DATA SOURCES. AI DOES NOT WARRANT AGAINST POSSIBLE ERRORS CAUSED BY SELF-PAY PATIENT ENCOUNTERS WITH CUSTOMER AUTHORIZED USERS OR THE RECEIPT AND ROUTING OF SENSITIVE HEALTH DATA SUBJECT TO SPECIAL PROTECTIONS, ALTHOUGH AI WILL USE ITS BEST EFFORTS TO MINIMIZE SUCH ERRORS.
 - c. NEITHER AI NOR ITS PARTNERS, LICENSORS, OR SERVICE PROVIDERS CONTROLS THE TRANSFER OF DATA OVER COMMUNICATIONS FACILITIES, INCLUDING THE INTERNET, AND THAT THE PULSE SOLUTIONS MAY BE SUBJECT TO LIMITATIONS, DELAYS, AND OTHER PROBLEMS INHERENT IN THE USE OF SUCH COMMUNICATIONS FACILITIES. AI IS NOT RESPONSIBLE FOR ANY DELAYS, DELIVERY FAILURES, OR OTHER DAMAGE RESULTING FROM SUCH PROBLEMS.
 - d. NEITHER AI NOR ITS PARTNERS, LICENSORS, OR SERVICE PROVIDERS WILL BE LIABLE TO ME, UNDER ANY CONTRACT, NEGLIGENCE, STRICT LIABILITY OR OTHER THEORY: (A) FOR ERROR OR INTERRUPTION OF USE, INACCURACY OR COST OF PROCUREMENT OF SUBSTITUTE GOODS, SERVICE OR TECHNOLOGY OR LOSS OF BUSINESS, DATA, PROFITS OR REVENUE; (B) FOR ANY INDIRECT, EXEMPLARY, PUNITIVE, INCIDENTAL, SPECIAL OR CONSEQUENTIAL DAMAGES; (C) FOR ANY MATTER BEYOND THEIR REASONABLE CONTROL, HOWEVER CAUSED ON ANY THEORY OF LIABILITY, EVEN IF SUCH PARTY HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH LOSS OR DAMAGE.
 - e. THE CUMULATIVE MAXIMUM LIABILITY OF AI AND ITS PARTNERS, LICENSORS, AND SERVICE PROVIDERS TO ME FOR ANY AND ALL CLAIMS, ACTIONS, PROCEEDINGS, DAMAGES, AND LIABILITIES ARISING IN CONNECTION WITH THE PULSE-COVID SERVICES, REGARDLESS OF THE NUMBER OF OCCURRENCES OR CLAIMS, SHALL BE LIMITED TO THE FEES ACTUALLY PAID BY ME TO AI FOR SUCH SERVICES, AND IF I HAVE PAID NO FEE, THEN TO TEN DOLLARS (USD \$10.00)
11. These Terms of Use, together with any terms and conditions agreed by Ai and the organization or entity that I represent that are applicable to its Authorized Users, contains the entire understanding of Ai and me regarding my use of the PULSE Solutions. I acknowledge that Ai may change the Terms of Use for the PULSE Solutions at any time and require me to accept such changed terms upon subsequent login in order to continue using the PULSE Solution.

PULSE ENTERPRISE END USER GUIDE

APPENDIX B

Permitted Purposes

Subscribers and Authorized Users may access and use data through PULSE Enterprise Solutions only for Permitted Purposes, as defined in the applicable Subscription Terms, Terms of Use, and the Policies and Procedures. Permitted Purposes for data use are listed below:

1. For Treatment of an individual.
2. For public health activities and reporting as permitted by Applicable Law, including the HIPAA Regulations at 45 C.F.R. 164.512(b) and (d) and 164.514. See [Disclosures for Public Health Activities | HHS.gov](#) and [COVID-19 and HIPAA: Disclosures to law enforcement, paramedics, other first responders and public health authorities \(hhs.gov\)](#).
3. In addition, for so long as HHS's April 2, 2020 "Notification of Enforcement Discretion under HIPAA to Allow Uses and Disclosures of Protected Health Information by Business Associates for Public Health and Health Oversight Activities in Response to COVID-19", [Notification of Enforcement Discretion for Business Associates and HIPAA \(hhs.gov\)](#), remains in force, and provided that Subscriber and its Authorized Users comply with the conditions specified in that Notification, Ai will not consider activities covered by that Notification to be breaches of these Policies and Procedures. Each Subscriber must make its own judgments respecting the contents of that Notification, and this Policy and Procedure does not override any HIPAA requirements or prohibitions, nor assure any Subscriber that it will be exempt from enforcement.
4. For uses and disclosures in connection with a "serious and imminent" threat to the health or safety of a person or the public, to the extent permitted by 45 C.F.R. 164.512(j).
5. With respect to armed forces personnel, for activities deemed necessary by appropriate military command authorities to assure the proper execution of the military mission, to the extent permitted by 45 C.F.R. 164.512(k)(1)(i).
6. For the following subset of Health Care Operations of a Covered Entity, as defined in 45 C.F.R. 164.501 [Definition of "Health care operations", clause (1)]:
 - a. Conducting quality assessment and improvement activities, including outcomes evaluation and development of clinical guidelines, provided that the obtaining of generalizable knowledge is not the primary purpose of any studies resulting from such activities;
 - b. Patient safety activities (as defined in 42 CFR 3.20);
 - c. Population-based activities relating to improving health or reducing health care costs, protocol development
 - d. Case management and care coordination,
 - e. Contacting of health care providers and patients with information about treatment alternatives; and
 - f. Related functions that do not include treatment.

PULSE ENTERPRISE END USER GUIDE REVISION HISTORY

Version #	Description	Date
1.0	PULSE Enterprise Initial Release (r2010)	February 23, 2021
1.1	PULSE Enterprise Initial Release (r2010)	March 3, 2021
2.0	Changes reflect new functionality in PULSE Enterprise Release (r2021-04)	May 7, 2021
3.0	Changes reflect new functionality in PULSE Enterprise Release (r2021-07)	July 6, 2021