HEALTH HARBOR

Harbor Clinicians User Guide

How the care team works the day: the schedule, visits and notes, the patient chart, messages, tasks, orders and results, and medications.

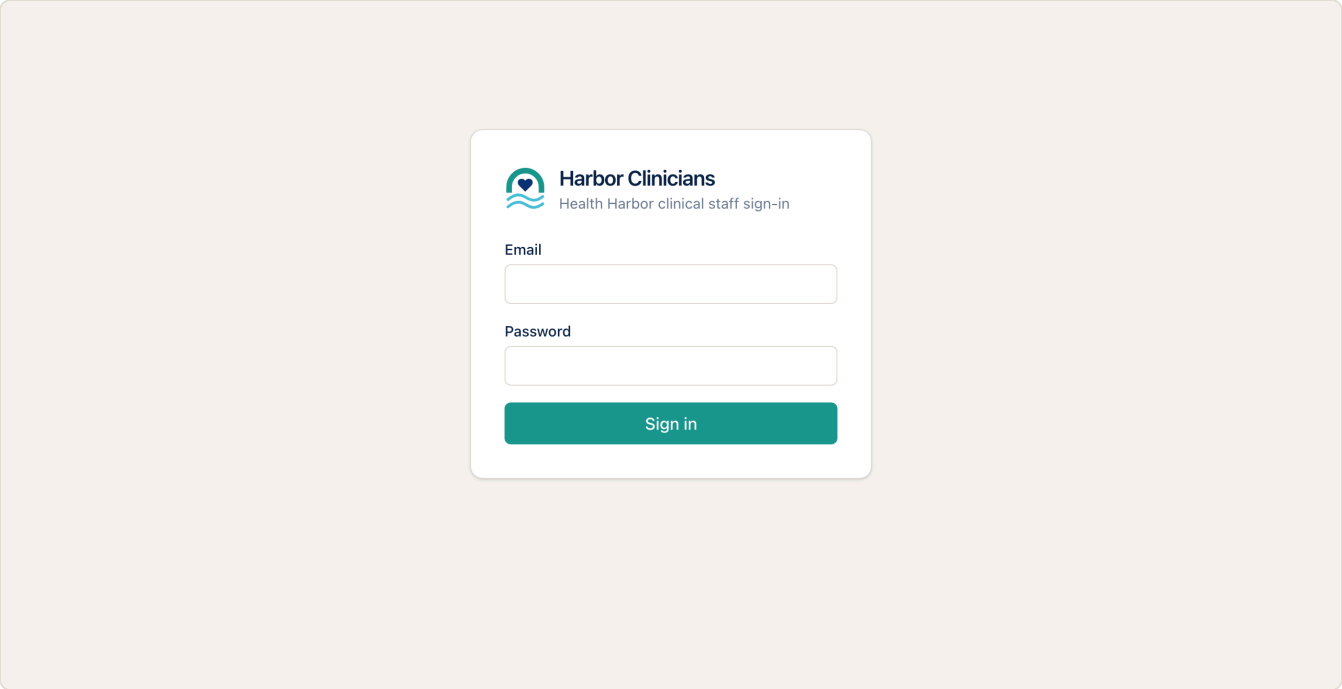
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For Health Harbor clinical and care-team staff · Version of November 2026 · Screens show demo data for Harbor Health Mission Valley

1. Signing in

Harbor Clinicians is for clinical and care-team staff. Use your Health Harbor email and password.



1. Open Harbor Clinicians in your browser. If you aren't signed in, you always land on this page.
2. Enter your **Email** and **Password**, then choose **Sign in**.
3. You arrive on the first page your role works with: **Schedule** for doctors, nurse practitioners, nurses and medical assistants, **Results** for lab techs, **Medications** for pharmacists and **Tasks** for care coordinators.

Your name shows at the top right. The app works out your role and your clinic from your staff account, so the menu and the buttons you see match the work you do.

If you can't get in

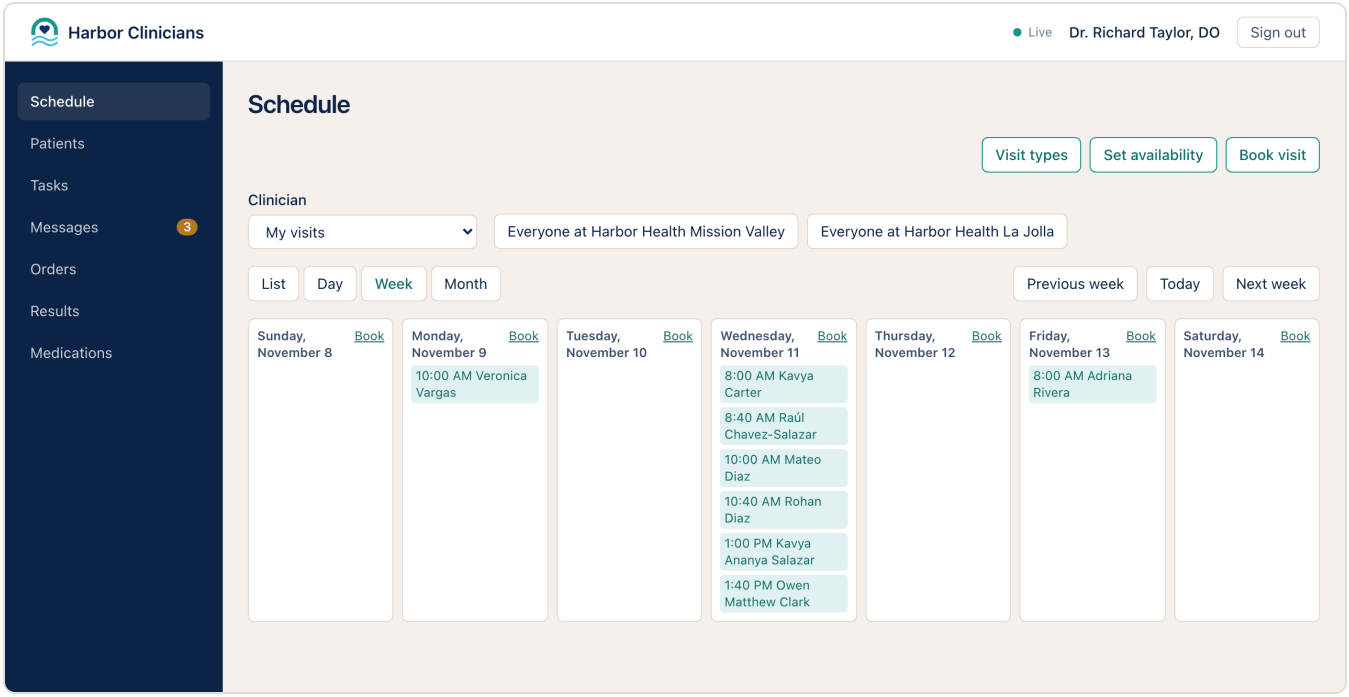
YOU SEE	WHAT IT MEANS
Email or password is invalid	Check for typos and Caps Lock, then try again.
Enter your email / Enter your password	Both are needed to sign in.

Signing out

Choose **Sign out** at the top right. Always sign out before you leave a shared workstation.

2. Finding your way around

Every page has the same frame: the menu on the left, your name and the live-update status across the top.



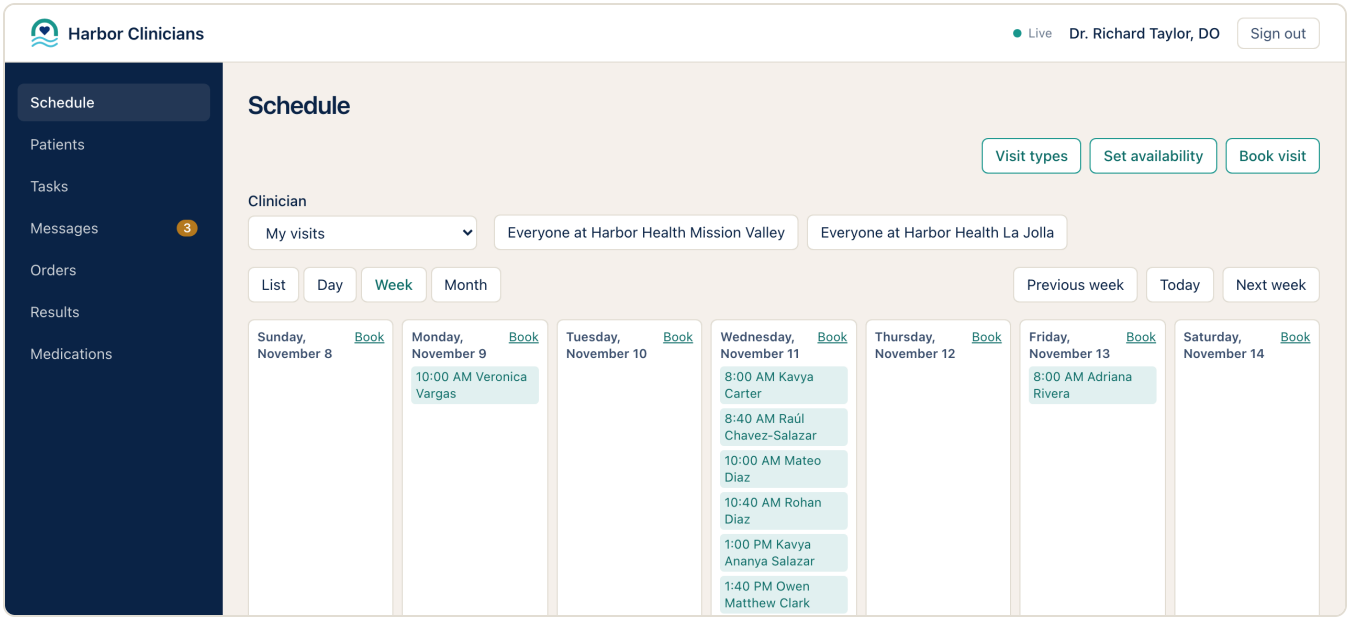
MENU ITEM	USE IT TO
Schedule	See your visits, or everyone's at a clinic, and book visits.
Patients	Find a patient, or list your own patients, and open their chart.
Tasks	Work tasks assigned to you or your role.
Messages	Answer patients and talk to colleagues about a patient.
Orders	Follow the lab orders and referrals you placed.
Results	Review and acknowledge results.
Medications	Work refill requests sent to you.
Care plans	Plan care with the team (care coordinators, social workers, dietitians and physical therapists).

You only see the items your role uses; see *What each role can do* at the end. Orange numbers next to **Tasks** and **Messages** show how much is waiting for you.

> **Live updates.** You don't need to reload. New messages, tasks and results appear by themselves, and the dot at the top says *Live*. If the connection drops it says *Checking every 15 s* and keeps checking until it's back.

3. The schedule

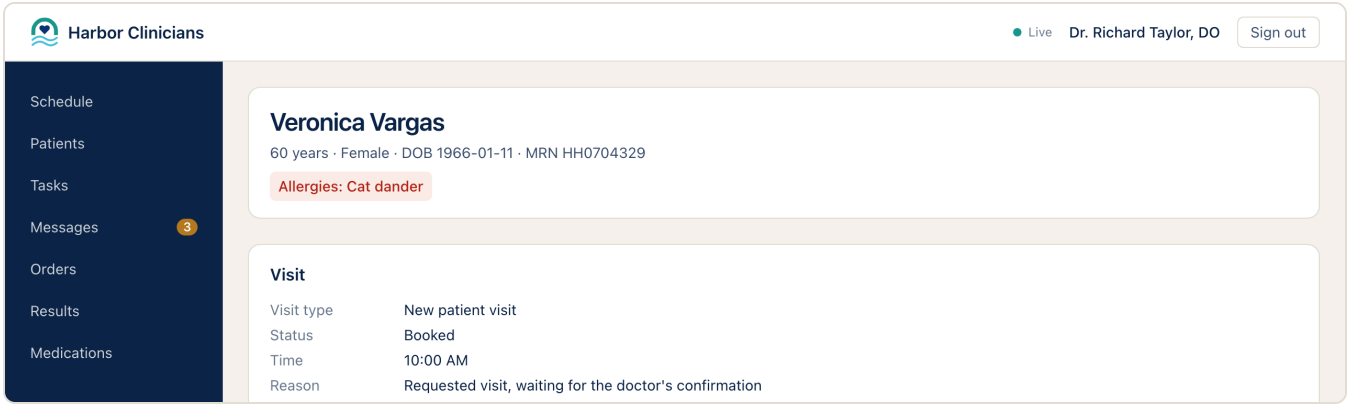
The schedule shows who you're seeing, and lets you look at any colleague's day or the whole clinic's.



The week view, signed in as Dr. Richard Taylor.

- **Clinician** starts on *My visits*. Pick a colleague to see their schedule, or choose **Everyone at Harbor Health Mission Valley** (or La Jolla) to see the whole clinic.
- Switch between **List**, **Day**, **Week** and **Month**, and move with **Previous**, **Today** and **Next**.
- Click a visit to open it. A booked visit opens its details; a visit that has started opens the visit itself, with its vitals and note.

A booked visit



The visit's type, status, time, reason and clinician are at the top. From here you can **Mark no-show**, **Reschedule** or **Cancel visit** (a reason is required), or choose a **Care template** and **Start visit**.

4. Booking and availability

Clinicians publish the times they're open; anyone on the schedule can book patients into them.

Setting your availability

1. On **Schedule**, choose **Set availability**.
2. Pick the days, the start and end times and the length of each visit. Times you open show as open slots on your calendar.

Doctors, nurse practitioners, dietitians and physical therapists set their own availability.

Choosing the visit types your calendar offers

Visit types lists the kinds of visit your calendar can be booked for, such as *Follow-up appointment* or *New patient visit*. Turn a type off to stop it being offered, or give it its own hours (for example, new patients only on Tuesday mornings). Choose **Save visit types**. A type you turn back on keeps the hours it had.

Booking a visit

1. Choose **Book visit** on the schedule, **Book** on a day in the week view, or **Book follow-up** from a patient's chart or a visit.
2. Choose the patient, the clinician and the visit type. You're offered that calendar's open times for the type.
3. Pick a time and book it. The slot is no longer open, and the visit shows on the calendar.

> **Tip.** If you see *That time was just taken*, someone else booked it a moment before you. Pick another time from the refreshed list.

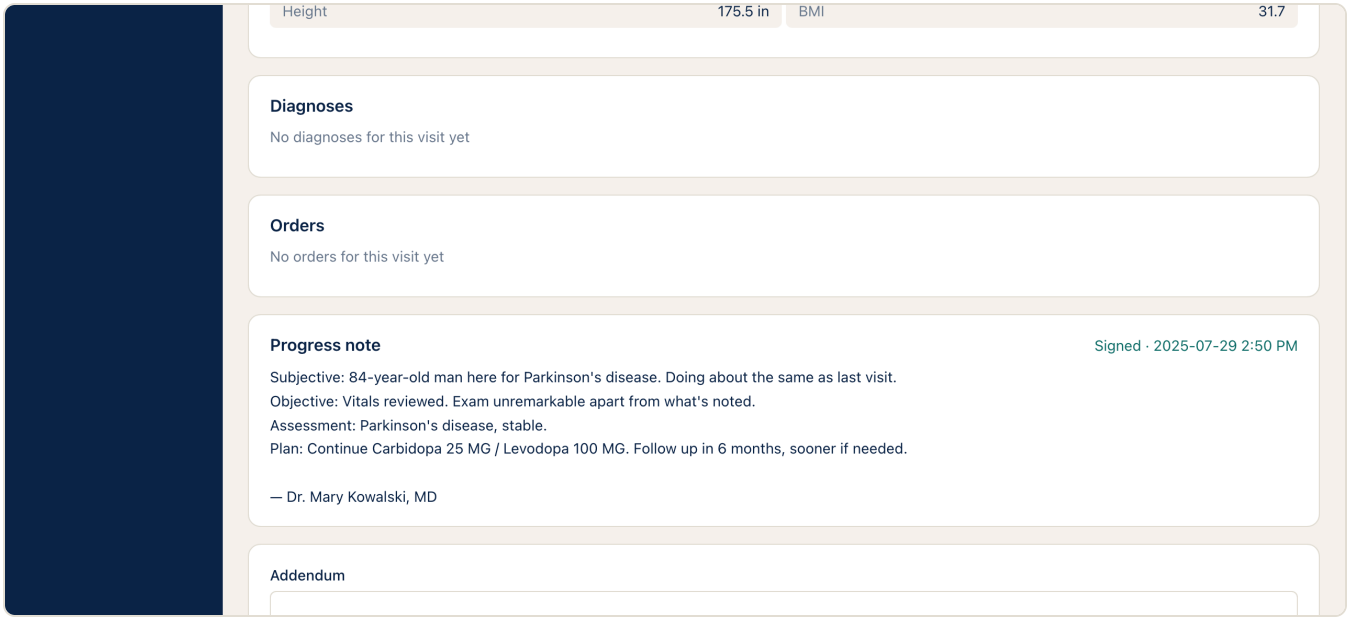
Rescheduling and cancelling

Open the visit and choose **Reschedule** to move it to another open time, or **Cancel visit** with a reason. A cancelled visit's time becomes open for booking again.

5. A visit, from booked to signed

The medical assistant rooms the patient and takes vitals; the clinician examines, orders and signs the note.

1. **Start the visit.** On the booked visit, choose a **Care template** if one fits (for example *Annual wellness visit* or *Diabetes follow-up*), then **Start visit**. A template lists its forms and orders as tasks on the visit, and ticks each off as it's done.
2. **Room the patient and take vitals.** Mark the patient **Roomed** and choose **Record vitals**: blood pressure, pulse, temperature, weight, height and more. Choose **Save vitals**.
3. **Diagnose and order.** Add diagnoses, then **Place order** for a lab test or referral. **Order set** places a reviewed group of orders at once; clear any you don't want before **Place order set**.
4. **Write and sign the note.** Write the progress note (subjective, objective, assessment, plan). **Save draft** keeps it; **Sign note** finishes the visit and locks the note.



A finished visit: its vitals, diagnoses, orders and the signed note, with room for an addendum.

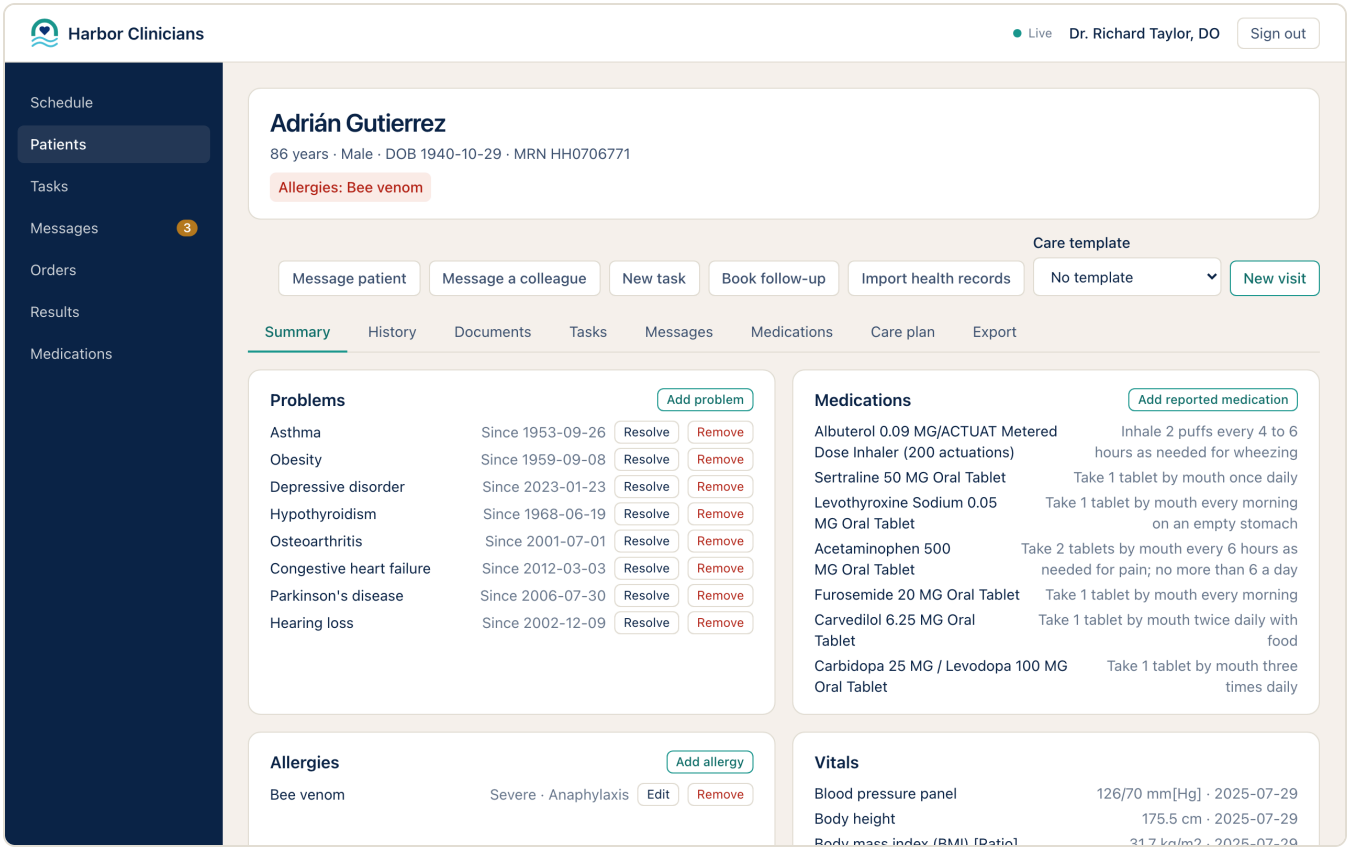
> **Dictating.** In Chrome 139 or later, each part of the note has a **Dictate** button: speak and your words are added to that part; **Stop dictating** ends it. The first time, Chrome may download its speech pack. Speech is turned into text on this computer: the audio and the dictation aren't sent or shared anywhere. In other browsers the button doesn't show.

> **Signing.** A note needs an assessment and at least one diagnosis before you can sign it. Once signed it can't be changed; add an **Addendum** and choose **Save addendum** instead.

Only doctors and nurse practitioners place orders and sign notes. Nurses and medical assistants record vitals, complete forms and edit visit details; nurses can also save a nursing note.

6. The patient chart

Find a patient on Patients, by name, date of birth or MRN, or choose My patients to list your own.



The header shows the patient's age, sex, date of birth, MRN and allergies on every tab. Its buttons let you **Message patient**, **Message a colleague**, add a **New task**, **Book follow-up**, **Import health records** or start a **New visit**.

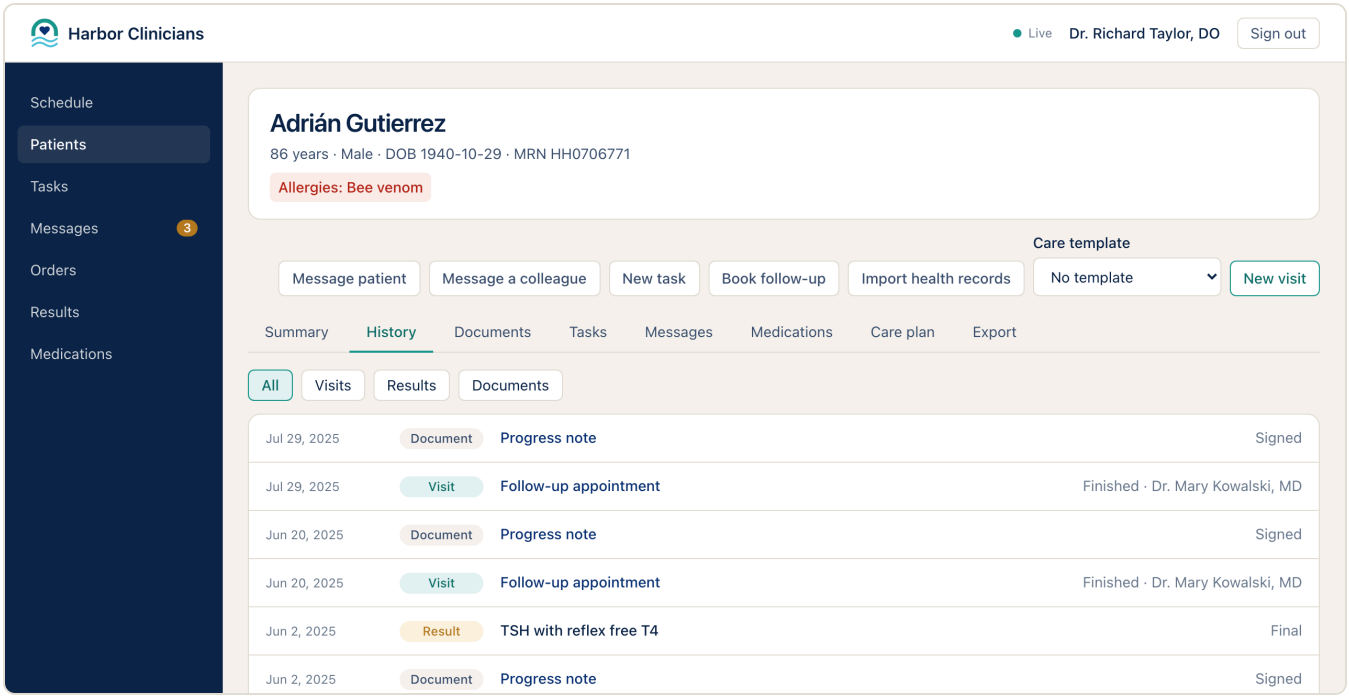
The summary

Problems, medications, allergies, vitals, immunizations, goals, smoking status, sexual orientation, pharmacies, orders and results, each with buttons to keep it current: **Add problem**, **Resolve**, **Add allergy**, **Record immunization**, **Add pharmacy** and so on.

> **Allergies protect prescriptions.** If you prescribe something the patient is allergic to, you'll see a warning naming the allergy and must choose **Prescribe anyway** to continue.

7. Chart tabs: history, documents and more

The tabs under the header hold the rest of the record.



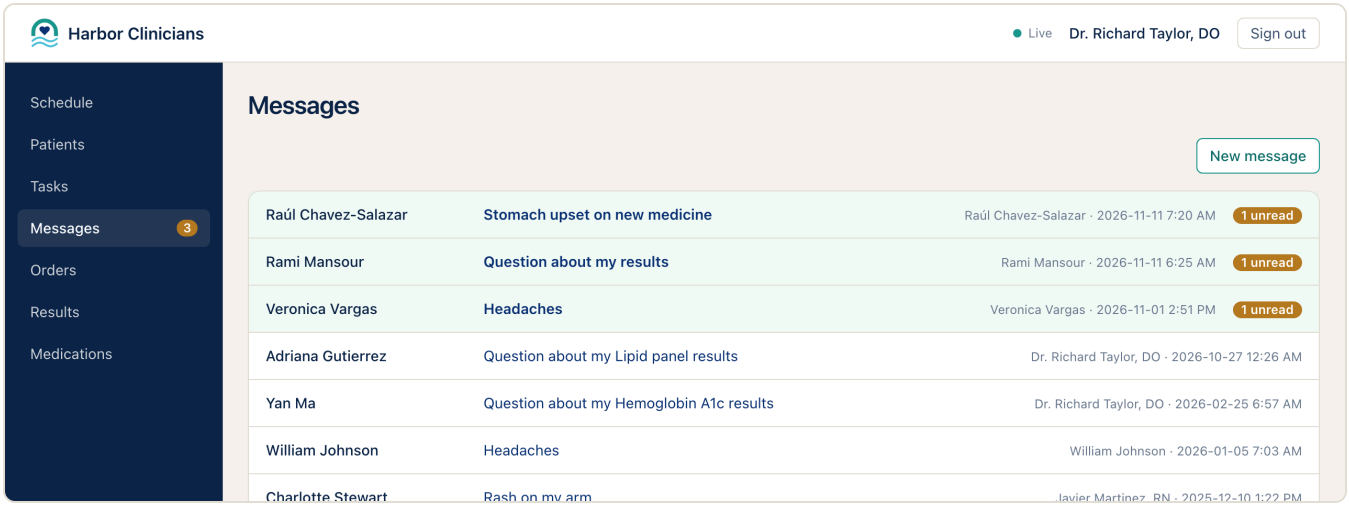
TAB	WHAT'S THERE
History	A timeline of visits, results and documents. Filter by *Visits*, *Results* or *Documents*, and click any entry to open it.
Documents	Visit notes, uploaded files and message attachments. **Upload document** adds a file to the chart.
Tasks	Tasks about this patient, open and completed.
Messages	Every thread with or about this patient.
Medications	Active medications with dose, prescriber, refills left and last fill. **Prescribe** and **Stop** are here.
Care plan	The patient's care plans, goals and care team.
Export	**Download record** (a zip with the FHIR bundle, the International Patient Summary and C-CDA documents) or a **Printable summary**.

Importing health records

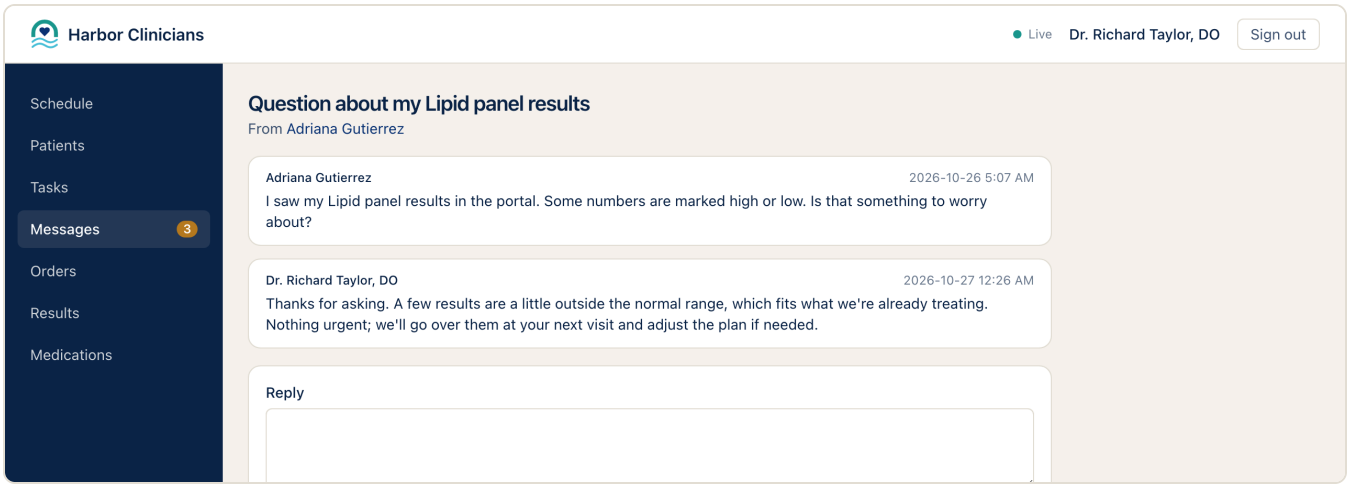
When a patient shares a SMART Health Link or Health Card, choose **Import health records**, paste the link (and its passcode, if it has one), tick the records you want and import them. Imported items are marked as imported on the chart.

8. Messages

Patients write to their own care team from the portal; colleagues write to each other about a patient.



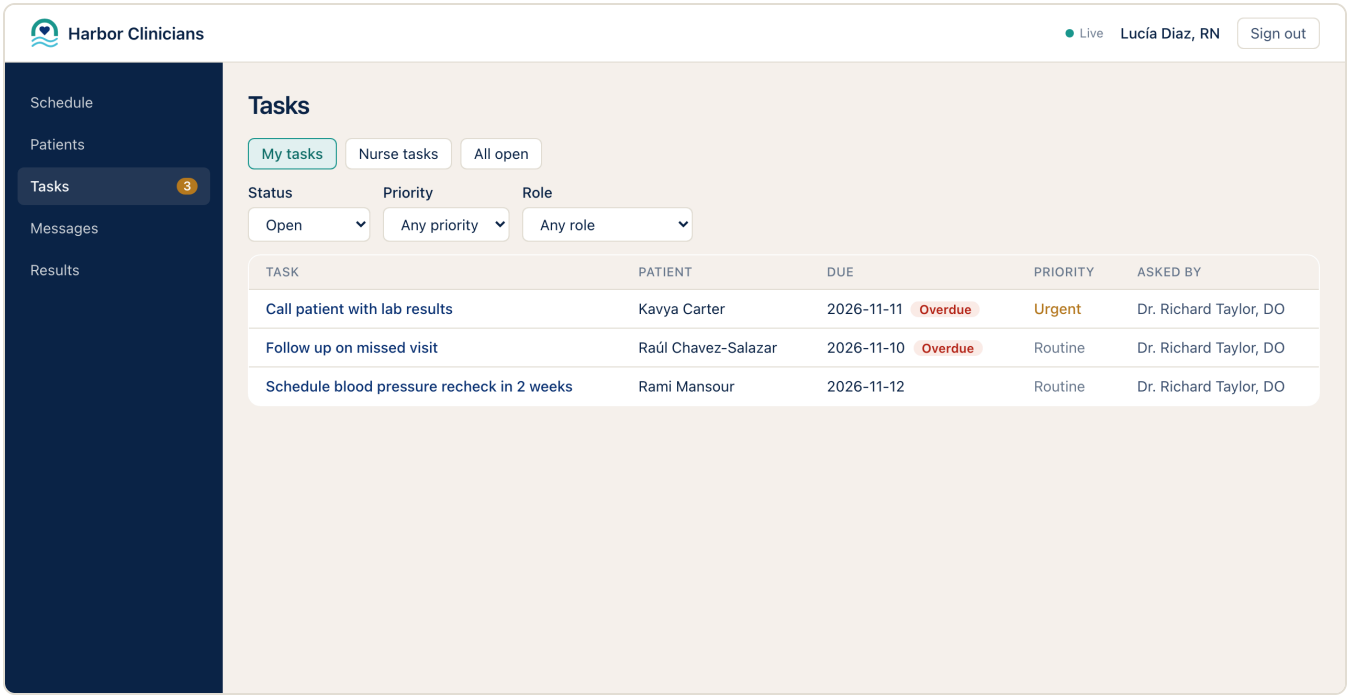
- Threads with unread messages are listed first, with an orange **1 unread** badge.
- Opening a thread marks it read. Write a **Reply**, attach files if you need to, and choose **Send**.
- **New message** starts a thread with a patient or, marked **Staff**, with a colleague.



Billing, scheduling and records questions go to the clinic's front desk inboxes, not to you.

9. Tasks

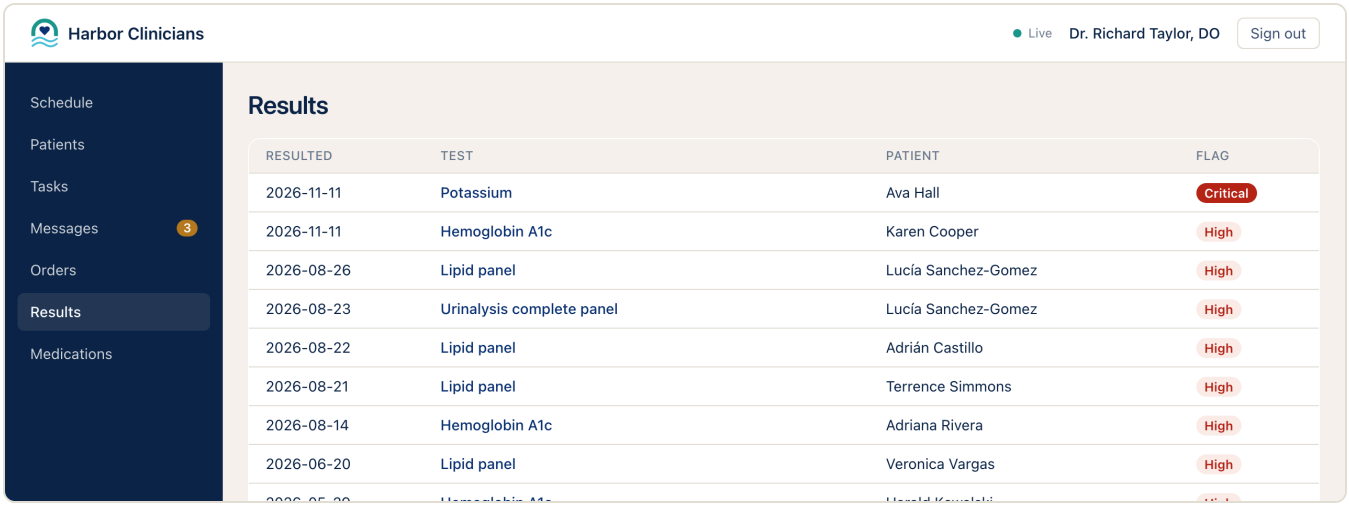
Work that needs doing is a task: someone owns it, and it gets done.



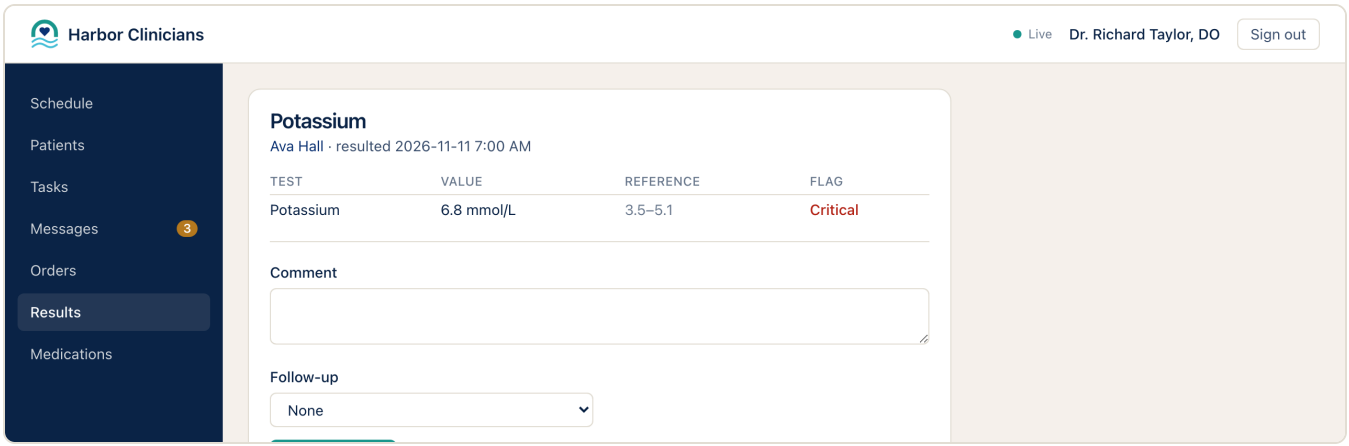
- **My tasks** shows tasks assigned to you; the second button shows tasks for your role (for example *Nurse tasks*) that anyone in it can pick up; **All open** shows everything.
- Filter by **Status**, **Priority** (STAT, ASAP, Urgent, Routine) and **Role**. Overdue tasks are marked **Overdue**.
- Open a task to **Complete task**, with a note if you like, or **Reassign** it to someone else.
- Create a task with **New task** on a patient's chart: what needs doing, who it's for, the priority and when it's due.

10. Orders and results

Prescribers order; lab techs enter results; whoever ordered reviews them.



- **Orders** lists the lab tests and referrals you placed, with their status: *Ordered* while waiting, *Resulted* once the result is in.
- **Results** lists results waiting for your review, flagged High, Low or Critical.

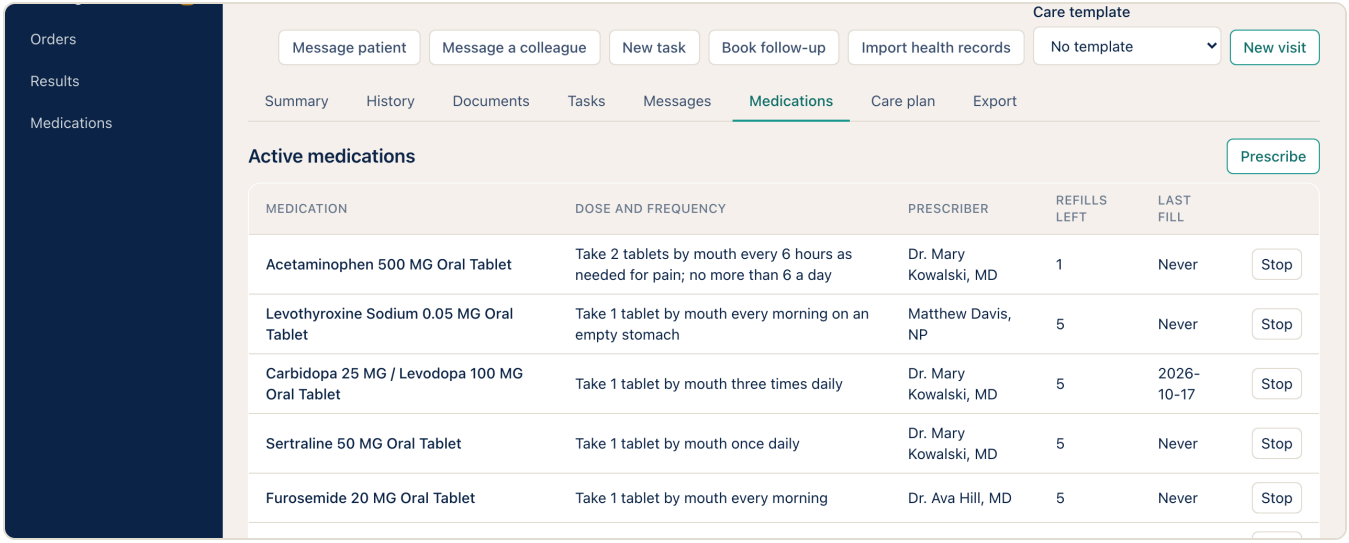


Open a result to see each value against its reference range. Add a **Comment**, choose a **Follow-up** (such as *Call patient*) and **Acknowledge**. It leaves your list and shows on the patient's chart.

Lab techs work from **Results** too: they **Mark collected**, enter values and **Save result**.

11. Medications and refills

Prescribers prescribe and stop medications; refill requests from the patient portal come to the prescriber and the pharmacist.



Prescribing

1. On the patient's **Medications** tab, choose **Prescribe**.
2. Choose the medication, how often, the refills allowed and the pharmacy, then save. If the patient is allergic, confirm with **Prescribe anyway** or cancel.

Choose **Stop** on a medication to end it.

Refill requests

Requests patients send from the portal arrive on **Medications**, under *Refill requests sent to me*, with the medication, the pharmacy and who asked (a patient or their caregiver). Approve one to add the refill, or **Deny refill** with a reason. The patient gets an email either way.

12. What each role can do

The menu and buttons follow your role. If something you need is missing, ask your manager to check your role.

ROLE	MENU	CAN ALSO
Doctor, nurse practitioner	Schedule, Patients, Tasks, Messages, Orders, Results, Medications	Order, prescribe, sign notes, edit problems, set availability, export charts.
Nurse	Schedule, Patients, Tasks, Messages, Results	Record vitals and immunizations, complete forms, edit allergies, save nursing notes, import health records.
Medical assistant	Schedule, Patients, Tasks, Messages, Results	Room patients, record vitals and immunizations, complete forms.
Lab tech	Results, Patients, Tasks, Messages	Mark specimens collected and enter results.
Pharmacist	Medications, Patients, Tasks, Messages	Work refill requests, edit allergies and pharmacies.
Care coordinator	Tasks, Schedule, Patients, Messages, Care plans	Build care plans and care teams, export charts.
Social worker	Schedule, Patients, Tasks, Messages, Care plans	Build care plans, set goals.
Dietitian, physical therapist	Schedule, Patients, Tasks, Messages, Care plans	Set availability, set goals, record their own visits.

Everyone but lab techs can upload documents to a chart.

13. Messages you may see

What Harbor Clinicians is telling you, and what to do about it.

MESSAGE	WHAT TO DO
Email or password is invalid	Re-enter your sign-in details.
Checking every 15 s	The live connection dropped. Keep working; it catches up when the connection returns.
That time was just taken	Someone else booked it. Pick from the refreshed list.
That time has passed. Pick a later time.	Choose a time that hasn't happened yet.
No open times in the next four weeks	The clinician hasn't opened time; ask them to set availability, or book with someone else.
Enter a reason for cancelling	A cancellation needs a reason.
Enter at least one vital / Enter both systolic and diastolic	Fill in the vitals before saving.
Dictation stopped: the microphone isn't available.	Allow Chrome to use the microphone for this site, or plug one in, then dictate again.
Dictation needs speech recognition on this computer, which isn't available.	Update Chrome to version 139 or later and dictate again. Dictation never falls back to sending audio elsewhere.
Write the note first	A note can't be signed while it's empty.
Add an assessment and at least one diagnosis before signing	Complete the assessment and add a diagnosis.
Patient is allergic to … may cause a reaction	Check the allergy. Choose a different medication, or **Prescribe anyway** if you mean to.
Choose a medication / pharmacy / diagnosis / patient	Pick one from the list before saving.
Write a message first / Add a subject	A message needs text, and a new thread needs a subject.
Enter the link's passcode	The shared health link is protected; ask the patient for its passcode.
Your role doesn't use this page	Use the pages in the menu on the left.