

# EMR Optimization

## Module 2 – Enrolment Correctness

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Shared health  
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## Table of Contents

Introduction.....	3
Ongoing Home Clinic activities .....	3
Remediating Pending Activities.....	3
Home Clinic reports .....	4
Enrolment correctness.....	4
Passive Enrolment.....	4
Active Enrolment.....	4
Correcting enrolment records.....	5
Managing deceased patients .....	5
Key takeaways .....	5
Next steps.....	6

## Introduction

The purpose of this module is to review ongoing Home Clinic enrolment activities including remediation, using your Home Clinic reports, and understanding enrolment correctness. This guide assumes your Home Clinic is using the Home Clinic Enrolment Service as the preferred method for supporting accurate and timely patient enrolment and remediation.

This module is not a comprehensive review of the above topics. For more detailed information, refer to the suggested links throughout this document or your Home Clinic Liaison. Additional resources are available in our online and on-demand [Home Clinic Toolkit](#).

At the end of this module, your clinic will:

- Understand the strategies to remediate Pending Activities
- Use reports in the Home Clinic Portal to support ongoing enrolment activities
- Identify scenarios that influence enrolment correctness
- Learn about strategies to improve enrolment correctness

## Ongoing Home Clinic activities

### Remediating Pending Activities

As reviewed in [Module 1 – Home Clinic foundations](#):

- The Home Clinic Portal is the source of truth for patient enrolment across the province
- Enrolment submissions may result in rejections or de-enrolments, known as Pending Activities
- The Home Clinic Enrolment Service is the recommended approach to manage and submit accurate and timely enrolment and efficiently manage remediation activities
- Patient enrolment status is available in eChart Manitoba to authorized users

It is important to review and remediate your Home Clinic's Pending Activities to align enrolment data in the Home Clinic Portal with your EMR. Maintaining this alignment will enable you to use your EMR enrolment data to support your practice. When patient enrolment data is reliable in your EMR, you can run reports to identify information about your enrolled patient population. For example, running a report to identify enrolled patients with diabetes that have not been seen in over 12 months. Your clinic could use this information to schedule patient appointments or to inform potential appointment demand.

For clinics using the Enrolment Service, Pending Activities can be found directly in your EMR in a designated mailbox and can be managed directly from the EMR or deferred until later.

If your Home Clinic is not using the Enrolment Service you will need to log into the Home Clinic Portal, access the Pending Activities section and use the information shown to update your EMR. The [Home Clinic Portal: Remediating Enrolment Records](#) quick reference guide outlines how to use filters in the Home Clinic Portal to assist with managing remediation activities in a more coordinated fashion.

## Home Clinic reports

The Home Clinic Portal contains reports on your Home Clinic's activities, such as enrolments, rejections, and de-enrolments. An important report that helps you align enrolment data in the Home Clinic Portal and your EMR can be viewed by following the directions in the Home Clinic Portal User Guide [Section 7.1 Clients Tab](#). This report allows you to see a list of the patients enrolled to your Home Clinic. Features of this report include filtering by enrolment method (e.g. passive or active) or associated main Primary Care Providers, as well as reviewing patient enrolment on a particular day using the "as of" feature.

More information about reporting can be found in the following resources:

- [Home Clinic Reporting Overview](#) - outlines the reports available, including details about each report and its availability (e.g. weekly, monthly).
- [Generating a List of Enrolled Clients](#) - a quick reference guide with instructions on how to generate, view, and export a list of all enrolled clients within the Home Clinic Portal who are associated and not associated to a main Primary Care Provider at your Home Clinic.
- [Generate a Home Clinic Report](#) - a quick reference guide that outlines how to access reports for your Home Clinic in the Home Clinic Portal.
- [How to use Microsoft Excel to optimize value of your Home Clinic Portal reports](#) – this quick 5-minute video demonstrates Excel basics using live video of how to navigate reports, search for information and filter to the data you want to review.

## Enrolment correctness

Enrolment confirms the relationship between a patient and their chosen Home Clinic. Patients are enrolled using one of [two enrolment methods](#), passive or active.

### Passive Enrolment

Passive enrolment is based on an inferred relationship between the patient and the Home Clinic. This is determined by the Home Clinic through analysis of data within their EMR system. Passive enrolment does not involve communication with the patient. Consider our tips for [Identifying Candidates for Enrolment](#) before you begin passively enrolling patients. This method of enrolment was common at the initiation of the Home Clinic initiative and is no longer a regular practice.

### Active Enrolment

Active enrolment involves direct verbal or written communication with the patient and ensures their understanding of the benefits.

**Active enrolment method is recommended** because it:

- Involves the patient in the enrolment decision
- Respects a patient's choice
- Minimizes enrolment conflicts and reduces your number of Pending Activities

Active enrolment can occur with new or existing patients and with patients who are currently passively enrolled. Home Clinics should strive to increase the proportion of their actively enrolled patients to **100%**.

Review [Module 1 - Home Clinic foundations](#) for customizable handouts and letters to share with your patients. These resources can help your clinic complete active communication with your patients and ensure their understanding of enrolment to a Home Clinic.

## Correcting enrolment records

Correctness is a data quality characteristic that refers to data accurately describing what it is intended to represent. See the [EMR Optimization Reference Guide](#) and additional resources in the [Home Clinic Toolkit](#) for more information.

Some of the most common enrolment correctness errors include:

- Patients associated with a main Primary Care Provider who is no longer practicing at the Home Clinic
- Deceased patients who remain enrolled
- Inactive patients who remain enrolled
- Passively enrolled patients who have not yet been transitioned to active enrolment

Think about your EMR enrolment workflows and data entry practices to identify issues that impact enrolment correctness at your Home Clinic. For example, enrolled patients who are associated to a main Primary Care Provider that no longer practices at your clinic. Use your EMR features and functions to identify records that require an enrolment update and make the applicable changes.

## Managing deceased patients

Once receiving notification of a deceased enrolled patient, Home Clinics should update their records by de-enrolling the patient in the EMR using the appropriate dates. Home Clinics using the Enrolment Service will receive deceased patient notifications directly within their EMR. Deceased patient information is also available in the Home Clinic Portal. More information can be found in our [Quick Reference Guide: Deceased Client Notification](#).

## Key takeaways

1. Active enrolment is the preferred method; strive to increase active enrolment to 100%.
2. Review and update the correctness of your patient enrolment regularly using reports and queries in your EMR and/or the Home Clinic Portal Reports and Pending Activities section. This includes management of deceased patients.
3. Remediate your Pending Activities to maintain alignment of patient enrolment between the Home Clinic Portal and your EMR.
4. The Home Clinic Enrolment Service provides your clinic with a streamlined way to manage patient enrolment and remediation activities directly from within your EMR

## Next steps

- Create a plan to remediate outstanding Pending Activities
- Identify passively enrolled patients and create a plan to update to active enrolment
  - Consider using the [Patient Communication Supports](#) customizable templates
- Identify enrolled patients with no main Primary Care Provider and determine whether associations should be in place; complete the necessary updates in your EMR
- Improve enrolment correctness by updating enrolment records for:
  - Enrolled patients associated to a main Primary Care Provider that is no longer practicing at your clinic
  - Enrolled patients that have a status indicating they are no longer receiving care from your clinic (e.g. inactive, deceased)
- Explore other enrolment correctness questions relevant to your Home Clinic:
  - Identify and clean-up records that require an enrolment update
  - If your Home Clinic is not using the Enrolment Service, discuss with your Home Clinic Liaison to understand the benefits and how to get access