

Home Clinic Portal: Client Validation

This quick reference contains information on how to access the Client Validations Scheduled Report, reasons why client identity validation failures occur and how to remediate client information. As Home Clinics are a source to eChart Manitoba, the identity of a client must be validated against the Manitoba Health record in Client Registry in order for information sharing to occur.

Getting Started

1. Log onto the [Home Clinic Portal](https://hcp.manitoba-ehealth.ca) (https://hcp.manitoba-ehealth.ca)
2. Acknowledge the Confidentiality Statement by selecting **OK**.
3. Select the appropriate **Home Clinic** name displayed on the Home page.

Accessing Client Validation – Scheduled Report

1. Select the **Scheduled Reports** tab in the top menu option.
2. Search for **Client Validation** within the scheduled reports list.
3. This report is scheduled to run on a monthly basis and will contain all client validation errors that occurred from the Home Clinic Portal against Client Registry. Errors will remain on this report until remediation has been completed.
 - a. Report display:

Client Validation							
Report Parameters:	PHIN: ALL						
Report Run Date:	01-Jun-2021 09:28:47 AM						
Totals:	4						
	Pass: 0	Fail:					
Validation Status	Validation Date	Home Clinic Portal			Client Registry		
		PHIN	Date of Birth	Admin Sex	PHIN	Date of Birth	Admin Sex
Fail	06-Dec-2019	999999999	01-Dec-2011	F			
Fail	05-Dec-2019	123456789	18-Aug-1994	M	123456789	18-Aug-1994	F
Fail	09-Feb-2021	324628542	01-Oct-2013	F			
Fail	22-May-2021	456789123	01-Jul-1967	F	456789123	28-Jul-1967	F

b. Report details:

- Report Parameters: Home Clinic name, Client Status of *Active*, All PHIN's that have a Validation Status of *Fail*
- Report Run Date: Date and time the report was run
- Totals: Total of outstanding validation failures

- Validation Status: Only information for clients who have demographics that have failed validation from the Home Clinic Portal against Client Registry are reported
 - Validation Date: The date the attempt to validate client information against Client Registry
 - Home Clinic Portal: Client demographic information from the Home Clinic Portal. These 3 demographics are used to validate client information against Client Registry
 - PHIN
 - Date of Birth
 - Admin Sex
 - Client Registry: Client demographic information found on the Manitoba Health record in Client Registry
 - PHIN
 - Date of Birth
 - Admin Sex
4. A regular review of this report, followed by the corresponding EMR updates to patient demographics will help to ensure accurate client information sharing.

Reasons Why Client Validation Failures Occur

1. When there is an update to the enrolment or demographic information in the Home Clinic Portal, the client information from the Home Clinic Portal is checked against the Manitoba Health record in Client Registry using PHIN, Date of Birth and Admin Sex. The validation errors that occur will be included in the **Client Validations – Current** report.
2. If the PHIN in the Home Clinic Portal does not match a PHIN on the Manitoba Health record in Client Registry, the three demographics in the Client Registry fields in the **Client Validations – Current** scheduled report will be blank. An example of this may be if you have enrolled a client that has a private insurance number listed as the PHIN. This will not validate against Client Registry as only Manitoba insured clients are in Client Registry. These ‘failed’ records will remain on future **Client Validation - Current** reports.
3. If the Client Registry Date of Birth in the **Client Validation - Current** report displays blank (but the PHIN and Admin Sex are present), this indicates that the client has an invalid date of birth record on their Manitoba Health card.
4. When a Home Clinic Client Summary is triggered, the Home Clinic Client Summary service verifies the client information from the Home Clinic EMR against the Manitoba Health record in Client Registry using multiple demographics. If a validation error occurs, a Client Summary validation message is sent to the EMR Home Clinic mailbox indicating that the client could not be matched to the Manitoba Health Record, and the Home Clinic Client Summary was therefore not sent to eChart Manitoba. If a Home Clinic fails to take action to address client validation failures using the **Client Validation - Current**

scheduled report, additional validation error messages for the client will be displayed in the EMR Home Clinic mailbox whenever a future Home Clinic Client Summary is triggered.

- a. Additionally, for the Home Clinic Client Summary to be sent to eChart, enrolment from the Home Clinic EMR must match the enrolment in the Home Clinic Portal.

Remediating Client Information

1. Client demographic information in the Home Clinic EMR is correct and Home Clinic Portal information displayed on this report is not correct:
 - a. Contact the client to confirm demographics
 - If the Home Clinic is using Enrolment Service, correct the demographics in the EMR and re-submit to update the Home Clinic Portal.
 - If the Home Clinic is using their Primary Care Data Extract (PCDE) as method of submitting enrolment records, correct the client demographics in the EMR **and** the Home Clinic Portal manually.
 - b. In either event, enrolment dates do not need to be changed
2. Client Date of Birth or Admin Sex information in Home Clinic EMR and Home Clinic Portal is correct and Client Registry information displayed on this report is not correct:
 - a. Contact client to inform of inconsistency and have client update their Manitoba Health card.
3. Client Date of Birth or Admin Sex information in Client Registry is correct and Home Clinic EMR and Home Clinic Portal is not correct:
 - a. Contact client to confirm, then update demographic information in Home Clinic EMR (see Step 1a). This corrected client demographic information will be updated in the Home Clinic Portal and will then be validated against Client Registry to have the client's Home Clinic information sent to eChart.
4. If you are updating the PHIN, ***please contact your Home Clinic liaison*** to have the Home Clinic Portal corrected as submitting the updated PHIN to the portal will cause a duplicate patient.

Additional Resources

Improve the quality of your patient demographic data using our [Patient Demographics Best Practices](#) quick reference guide. A [video](#) is also available if you prefer.