

## Home Clinic Client Summary FAQ

### 1. What is a Home Clinic Client Summary?

A Home Clinic Client Summary is a document that contains an enrolled patient's key health information provided from the Home Clinic's Certified EMR. Client Summary documents will be stored in eChart Manitoba and will be accessible to authorized eChart users across the province in support of direct patient care.

### 2. Why is Manitoba introducing the Home Clinic Client Summary?

Patients, clinics, and health-care providers can benefit from the summary because it:

- Efficiently connects health-care providers with information, enabling better continuity of care and potentially improving outcomes for the patient
- Supports collaboration and teamwork to support the College of Family Physicians of Canada's vision of the Patient's Medical Home

### 3. What information is included in the Home Clinic Client Summary?

The summary includes the following information as recorded in the Home Clinic's EMR:

- Patient demographics and Home Clinic details
- Health Conditions and Diagnoses
- Surgeries, Procedures and Interventions
- Suspected Allergies and Intolerances
- Prescribed Medications
- Vital Signs Recorded

Home Clinic Client Summary Comments can be recorded in a new field in your EMR to capture information considered essential to the ongoing care of your patient. When using this field it is important to consider privacy implications as data entered in this field will be available to all authorized eChart users.

### 4. What change does this represent to primary care providers?

Your Home Clinic's EMR will become a source of information in eChart Manitoba. Enrolled patient information entered into your EMR will be available to authorized users of eChart Manitoba as they plan care for your patient. Home Clinics should become familiar with the contents of the Home Clinic Client Summary and understand which EMR data fields are used to construct the Client Summary.

### 5. Who will be able to see the Home Clinic Client Summary?

Authorized health-care providers across the province will be able to access a patient's Home Clinic Client Summary in eChart Manitoba. Patients can receive a copy of the Home Clinic Client Summary when they request copies of their personal health information contained in eChart.

## **6. Where can I find a patient's Home Clinic Client Summary in eChart Manitoba?**

If a patient has a Home Clinic Client Summary available in eChart it can be located in the Clinical Documents tab as a PDF document in the Primary Care Home Clinic folder.

## **7. What do I need to tell my patients?**

As a source to eChart, you must take reasonable steps to ensure clients understand what information is being shared to eChart and why. You can find patient communication support materials that address privacy and security in the Home Clinic section of the Shared Health website.

## **8. How will my patient's privacy be protected?**

eChart Manitoba has measures in place to protect patients' privacy and keep their information safe. All Manitoba's regulatory and legislative standards on protecting personal health information, including The Personal Health Information Act (PHIA) are followed. All user access is password protected, recorded, and can be audited.

Patients may place a Disclosure Directive on the eChart record, which will hide their personal health information in eChart, allowing only their name, personal health identification number, date of birth and address to be seen by health-care providers. Certain health-care providers who have the highest level of access to eChart may temporarily override a Disclosure Directive, indicating the reason for doing so.

Patients can be directed to the eChart website at [echartmanitoba.ca](http://echartmanitoba.ca) or phone 1-855-203-4528 (toll free) for more information.

## **Home Clinic Client Summary Service**

### **9. What is the Home Clinic Client Summary Service?**

The Home Clinic Client Summary Service will provide a secure method for a Home Clinic to submit the Home Clinic Client Summary for enrolled patients from a Certified EMR, in a standardized PDF document, to eChart Manitoba. Home Clinic Client Summary documents will be stored under the Clinical Documents tab in the Primary Care Home Clinic folder and will be accessible to authorized health-care providers in support of direct patient care.

### **10. What are the benefits of using the Home Clinic Client Summary Service?**

The Home Clinic Client Summary may provide the following benefits to Home Clinics:

- Reduces calls to your clinic for basic information
- Provides other health-care providers a more informed starting point when caring for your patient
- Supports your role to provide comprehensive patient care and coordination with other care providers

### **11. What are the prerequisites to get this service?**

You must be an active Home Clinic using a Manitoba Certified EMR that has achieved certification to both the Home Clinic Enrolment Service and the Home Clinic Client Summary Service. Please refer to the Manitoba EMR Certification Status table on the Digital Health,

Shared Health website at <https://sharedhealthmb.ca/health-providers/digital-health/pcis-office/manitoba-emr-certification/certification-status/> to determine the status of your EMR. In addition, before implementing the Home Clinic Client Summary Service, your Home Clinic will need to implement the Home Clinic Enrolment Service.

If you are a current user of eHealth\_hub services (e.g. electronic delivery of lab results or diagnostic imaging reports, Client Registry Query Service), you will need to sign a new Home Clinic Client Summary Service module to append to your eHealth\_hub Service Agreement. If you are new to eHealth\_hub services, a Service Agreement will require signature at the site level within your Home Clinic in addition to the service module. To learn more about eHealth\_hub services visit <https://sharedhealthmb.ca/services/digital-health/ehealth-hub>.

## **12. Why does my Home Clinic need to implement the Home Clinic Enrolment Service before implementing the Home Clinic Client Summary Service?**

When using the Enrolment Service, enrolment data entered into your EMR is sent directly to the Home Clinic Repository for processing, providing your clinic with an efficient method to validate enrolment. This ensures Home Clinic Client Summaries contain the most current enrolment information available and will help support communication from episodic providers back to your Home Clinic.

## **13. How do I request this service?**

Clinics can use the application form for eHealth\_hub services, which includes the Home Clinic Client Summary Service. This can be found by visiting the eHealth\_hub web page at <https://sharedhealthmb.ca/services/digital-health/ehealth-hub>. Active Home Clinics can also contact their Home Clinic Liaison for support.

## **14. After I request the Client Summary Service, how long will it take for me to be able to use the service?**

Upon receipt of your request, you will be contacted by a Digital Solutions Facilitator at Digital Health, Shared Health to confirm eligibility. Following this meeting, and assuming the above pre-requisites are met, Home Clinics should expect an implementation timeline of four to six weeks. Clinics with no pre-existing eHealth\_hub services may require more time as Service Level Agreements will need to be in place prior to go live. Digital Health, Shared Health will assist clinics with coordination and in understanding the technical requirements in consultation with your Home Clinic Liaison.

## **15. What do we need to do to prepare?**

As a Home Clinic, it is important for you to understand where and how the information contained in the Home Clinic Client Summary is captured in your EMR, as this may vary by EMR product and by practice context. This will provide you with the best opportunity to submit comprehensive Client Summary data. It is recommended that clinics contact their Home Clinic Liaison who can provide additional support on workflow and assist with understanding EMR data quality considerations specific to your Home Clinic.

**16. Can my clinic sign up for the service if not all providers with enrolled patients wish to participate?**

No. Once the Home Clinic Client Summary Service is implemented at a clinic, summaries will be sent to eChart for all enrolled patients associated to that Home Clinic.

### After implementing the Home Clinic Client Summary Service

**17. When will a summary be sent to eChart Manitoba?**

When any EMR user enters or changes information in designated EMR fields for enrolled patients, Home Clinic Client Summary data is sent at the next scheduled interval (at least once per day) to eChart Manitoba. Each time that data is sent, validation occurs to ensure that mandatory patient identifying information is present. Once validated, a new Home Clinic Client Summary document will be posted in eChart to ensure the most current information is available. Only the most recent summary will appear in eChart. Only active Home Clinics can send Home Clinic Client Summaries to eChart.

**18. What happens if the validation process fails?**

It is very important that client identity and enrolment information is accurate in your EMR to prevent validation failures. If client identification attached to a Home Clinic Client Summary fails validation, Home Clinics will receive a message in the Home Clinic mailbox within their EMR. Correcting the validation issue in most cases will cause the summary data to be sent again at the next scheduled interval.

The Client Registry Query Service, another eHealth\_hub service, can help improve the accuracy of client identity information in your EMR. Talk to your EMR Vendor to determine whether this service is available to you.

**19. What if I see an error in the patient's chart in my EMR and a summary has already been posted to eChart?**

Any EMR user can correct errors in a Home Clinic Client Summary by updating patient information in their EMR. When information in designated EMR fields is changed for enrolled patients, summary data is sent at the next scheduled interval to eChart Manitoba. Upon passing validation the new Home Clinic Client Summary will be posted to eChart.

If a health-care provider (or patient) identifies an error in the summary, the patient should follow up with their Home Clinic.

**20. Who do I contact for assistance with using the Home Clinic Client Summary Service?**

Your vendor is the first point of contact on how to use your Certified EMR to successfully populate Home Clinic Client Summaries.

If you have questions regarding your Home Clinic, patient enrolment or preparing for implementation of the Home Clinic Client Summary Service, contact your Home Clinic Liaison or the Home Clinic Team at:

- Phone: (204) 926-6010



- Toll-free: 1-866-926-6010
- Email: [homeclinic@sharedhealthmb.ca](mailto:homeclinic@sharedhealthmb.ca)

If you encounter technical issues (e.g. system connectivity errors when attempting to submit summary information or retrieve validation messages), please contact the Shared Health Service Desk at:

- Phone: (204) 940-8500\*
- Toll-free: 1-866-999-9698
- Email: [servicedesk@sharedhealthmb.ca](mailto:servicedesk@sharedhealthmb.ca)

\*Please ensure that you contact the Service Desk by phone for higher priority requests.