Home Clinic Portal

Home Clinic User Guide

Version 2.5
March 2022

Shared health
Soins communs
Manitoba

Table of Contents

1 Introduction

1.1 Overview

The Home Clinic Portal enables authorized users to:

- Complete the Home Clinic Registration process;
- Maintain Home Clinic and provider information over time;
- Manage client enrolment, including activities such as provider changes, enrolment record rejections and de-enrolments;
- Monitor Primary Care Data Extract (PCDE) submissions processed for ongoing enrolment, if applicable; and
- View, print and export scheduled reports.

1.2 Getting Started

Before using the Home Clinic Portal, a resource within registered Home Clinics must be provisioned with access to the Digital Health, Shared Health network (i.e. domain NTDWRHA). If you do not have this access, the Primary Contact for your clinic may initiate an access request by completing the procedure described on the Registered Home Clinic page of the Digital Health, Shared Health Home Clinic site.

The Home Clinic Portal is a web-based application, and it is designed to function with a variety of Internet browsers including Internet Explorer 11, Chrome or Firefox. It is important that you

ensure an appropriate browser is installed on your computer to get the best experience working in the Home Clinic Portal. Note that the Home Clinic Portal is not likely to perform well for those accessing the Internet using dial-up connectivity.

1.3 Available Support

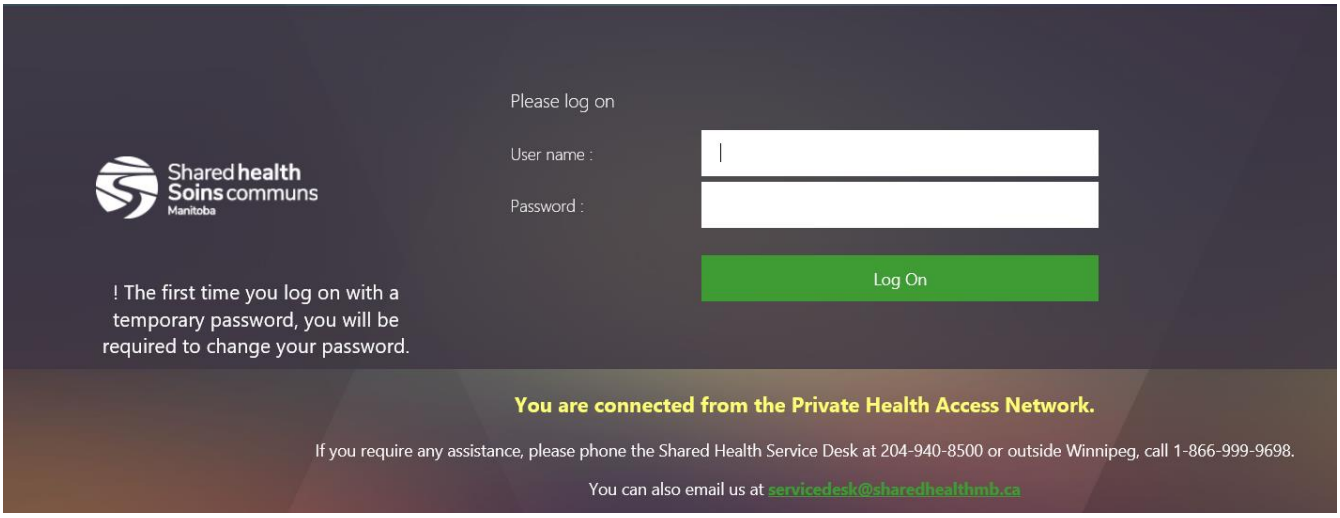
If you have **business**-focused questions regarding Home Clinics, patient enrolment or any related Home Clinic Portal function, or require support with data correction, contact the Home Clinic team at 204-926-6010, 1-866-926-6010 or homeclinic@sharedhealthmb.ca.
If you encounter any **technical** issues (e.g. difficulty logging in, unable to view a report, etc.) while using the Home Clinic Portal, please contact the Digital Health Service Desk at 204-940-8500, 1-866-999-9698 or servicedesk@sharedhealthmb.ca.

2 Log On

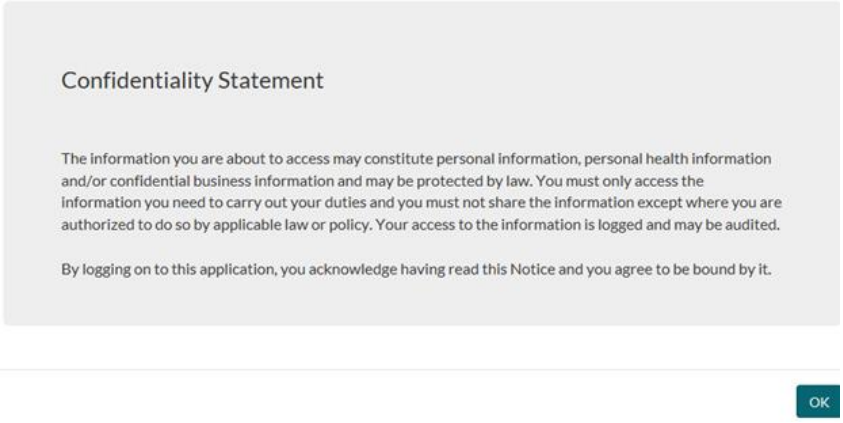
The Home Clinic Portal may be accessed via the following link: https://hcp.manitoba-ehealth.ca/

To log on to the Home Clinic Portal:

1. Enter your Digital Health, Shared Health network user name and password (If you are logging in with a temporary password, you will be prompted to change it)
2. Click the ***Log On*** button



When you first log into the portal, you will be presented with a Confidentiality Statement. Review the statement and click ***OK*** to confirm your understanding of the terms of use.

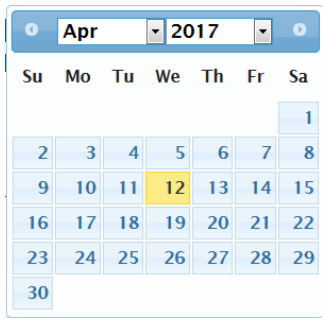


After logging on to the Home Clinic Portal, you will be taken directly to your Home page.

3 General Tips

This section provides tips that apply to more than one function within the Home Clinic Portal.

3.1 Using the Calendar to Populate Date Fields



Using the calendar feature ensures that date fields are populated with the correct date format. Simply click in any date field and the calendar will display.
Select the date information in the order of year, month and then day. Even when making changes to your original date selections, this order is key. For example, if you change the year after your initial selection, you will be required to re-select the month and day.

3.2 Using the “As of” Feature

Using the ***As of*** field enables you to see enrolment as it looked on a selected date. This feature is available when viewing a client's enrolment history and retrieving a list of clients enrolled to your Home Clinic.

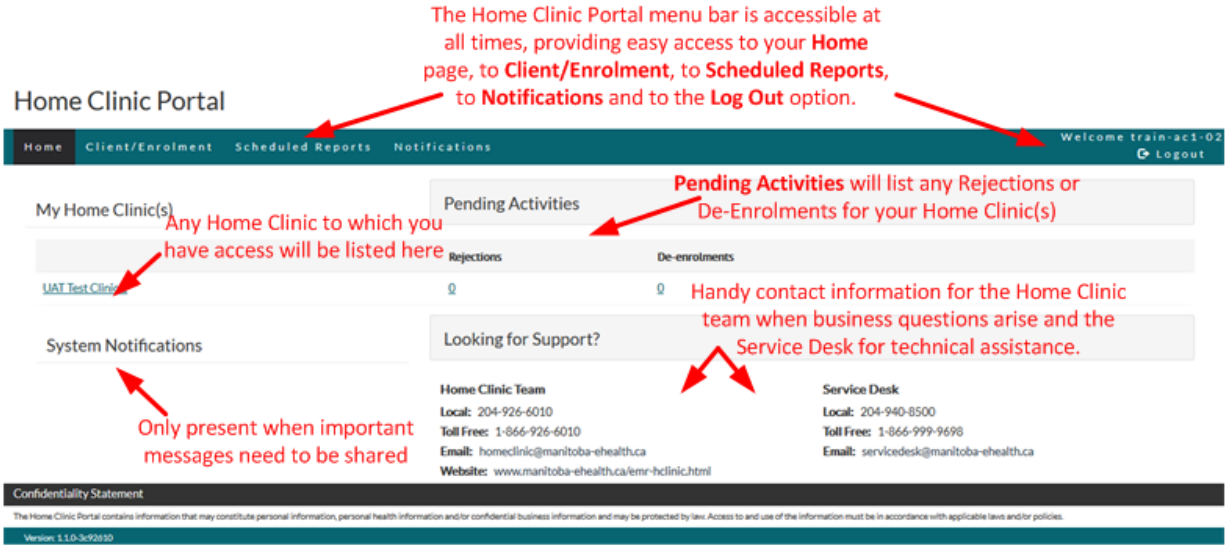
- The field defaults to today's date.
- When a previous date is selected, the screen will display in yellow to visually identify that historical information is being viewed.
- Changes that occur after the chosen date are not reflected in this view.
- Select the ***Today*** button to reset the date to today's date.

4 Home Clinic menu bars

This section outlines the main Home Clinic menu bars and related headers that will help you navigate the Home Clinic Portal.

4.1 Main Menu Bar

This main menu bar and **Home** screen will be displayed after a successful log on. This page provides a central point to access all the portal functions you need as a Home Clinic, as illustrated below.



4.2 Viewing Home Clinic Header Details

View Home Clinic

PCDE UAT 10, 1000009

Home Clinic Status: Active, 08-Mar-2017

The header at the top of the Home Clinic page contains key information, such as the Home Clinic identifier, Home Clinic status and date.

4.3 Viewing Home Clinic Tabs

From the view Home Clinic screen, you will see multiple tabs: Address, Contact, Providers, Clients, and PCDE Upload. More information about each of these tabs is provided in this guide.

4.4 Home Clinic View/Update Screen

View Home Clinic

Test Home Clinic A, 1000060

Home Clinic Status: Active, 16-Apr-2019

Home Clinic Name Type: Legal
EDTR Clinic Identifier: 9996

EMR: Test1
EMR ID:
Shared EMR: N/A
EMR Implementation Date:
Accept HC Criteria: Yes

Email:
Phone: Main 123-456-7890

Liaison: train-hcp-01 train-hcp-01
MyHT Associations:
Authorized to send client summaries: Yes

From the View Home Clinic screen, you will see whether your clinic is authorized to send Home Clinic Client Summaries.

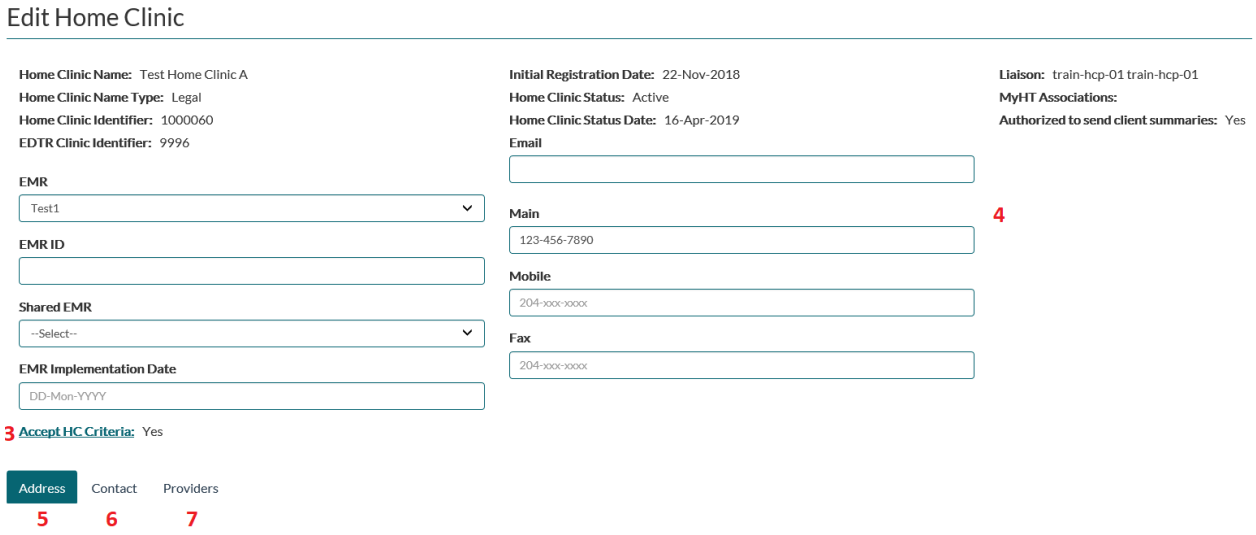
5 Home Clinic Registration

5.1 Complete the Registration Process

Completing the Initiate Home Clinic Registration form and receiveing credentials (e.g. username and temporary password) for the Home Clinic Portal are prerequisites. The Home Clinic team will already have entered the information from your registration form.

1. To complete the registration process, select the ***Home Clinic name*** from the Home page. The View Home Clinic page will be displayed. This page will contain the information provided in the Initiate Home Clinic Registration form.

2. Select the ***Edit*** button to complete the required information.

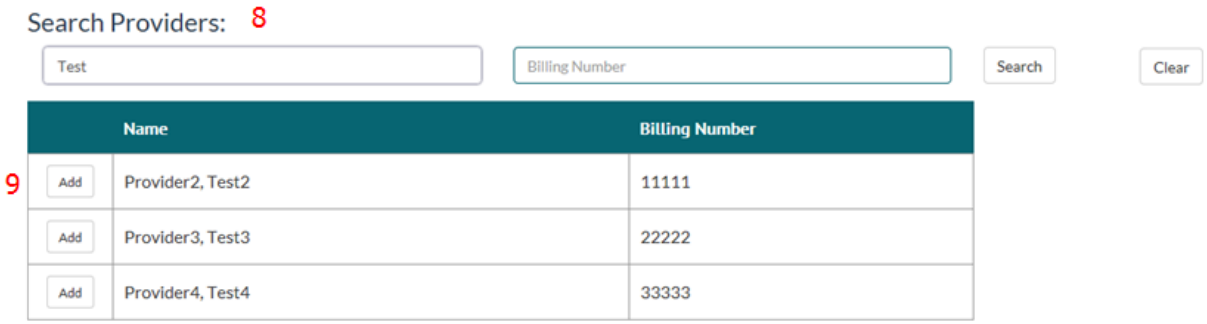


3. Select ***Accept HC Criteria***. A pop-up window will be displayed that contains the criteria your primary care clinic must meet to register as a Home Clinic. Review each criterion, and if your clinic is eligible, willing and able to meet the criteria, indicate that commitment checking the ***Read and Accept Criteria*** checkbox.

> **!** *If your clinic is not eligible to meet the criteria, do not proceed.*
>
> *Simply same and exit the Home Clinic Portal. Contact the Home Clinic Team to discuss next steps*

4. If the ***Email address*** or ***Phone numbers*** for the clinic are incorrect, please modify. You can add an extension to the ***Main*** clinic phone number or a Contact's Work phone number. Note: your Fax Number may also be listed here.

5. Select the ***Address*** tab. The Primary Address will already be populated. If your clinic's mailing address is the same, simply check the ***Same as Primary Address*** checkbox. If the address is different, enter the ***Mailing Address***.
6. Select the ***Contacts*** tab. The Primary Contact will already be populated. If you choose, you may enter an alternate contact for your clinic. Alternate contacts may include, for example, the Clinic Manager or one of the Home Clinic Portal users.
7. Select the ***Providers*** tab.



8. ***Search*** for the provider by entering name information (first or last only, first and last) or billing number related to a provider (family physician, general practitioner or nurse practitioner) that will be associated with the Home Clinic as a Most Responsible Provider for enrolled patients. Complete the search action by pressing the ***Enter*** key on the keyboard or clicking on the ***Search*** button.

For fee-for-service physicians, it is essential that the billing number be the same as the number that will be associated with Comprehensive Care Management tariff claims.

9. Search results will be displayed based on the information entered. If the correct provider is included in the search results, click the ***Add*** button at the left side of the provider's row. This will associate them to the Home Clinic.
10. Select the Most Responsible Provider's ***Provider Type***.

> **!** *The provider's Start Date will be automatically populated by the system once the Home Clinic is registered.*

Repeat steps 8 through 10 until all appropriate providers are associated.

11. Click **Save** to record the edits. You can close and return to complete the registration later.
12. You may choose to review all information entered as part of your registration before submitting. Simply select the ***Print Home Clinic Summary*** button at the top right of the Home Clinic page.

- If the information is not correct, add or edit information as necessary.
- If the information is complete and accurate, select ***Edit*** again, and then select the ***Submit Registration*** button. If required information is missing, a message will be displayed. Click ***OK*** and return to complete the highlighted fields. Once complete, click the ***Submit Registration*** button again and the Home Clinic team will be notified that your registration is ready for processing. You will receive a confirmation by email.

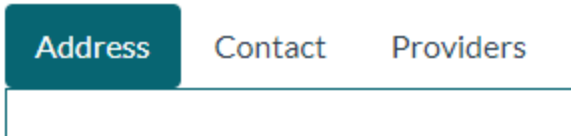
6 Maintain Home Clinic Details

It is important that the information related to your Home Clinic be kept current. If, for example, your Home Clinic's Primary location address changes or as new contacts join your team, retire, etc. It is important that this information be kept current.

6.1 Update Home Clinic Information

Select the ***Home Clinic*** name from the Home page. The View Home Clinic page will be displayed.

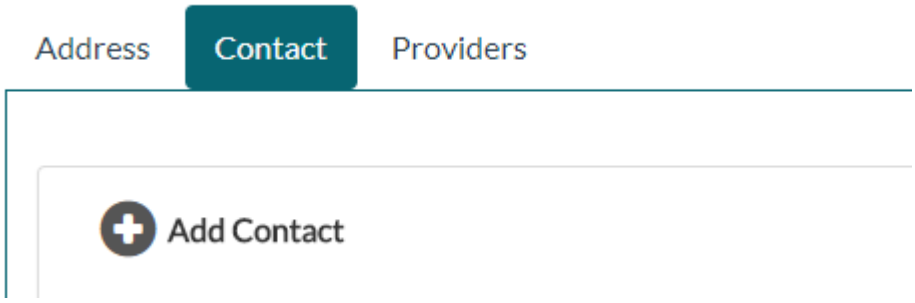
1. Select the ***Edit*** button to make the necessary corrections.
2. Select the ***Address*** tab.
3. Make the necessary changes to address and/or telephone numbers.
4. Once you have completed your changes, return to the top of your window and click ***Save***.



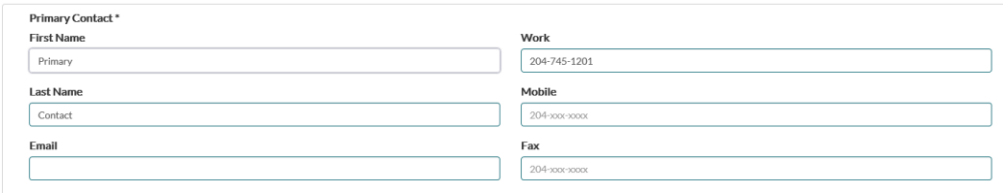
6.2 Manage Contacts

Select the ***Home Clinic*** name from the Home page. The View Home Clinic page will be displayed.

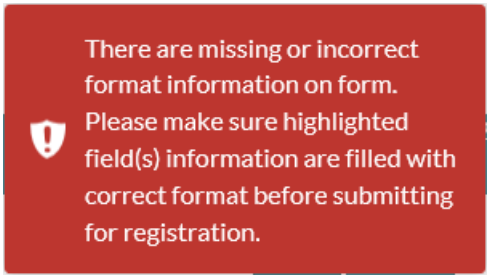
1. Select the ***Edit*** button to make the necessary corrections.
2. Select the ***Contact*** tab.
   a) If adding a new contact, select the ***+ Add Contact*** button and complete the new contact's details.

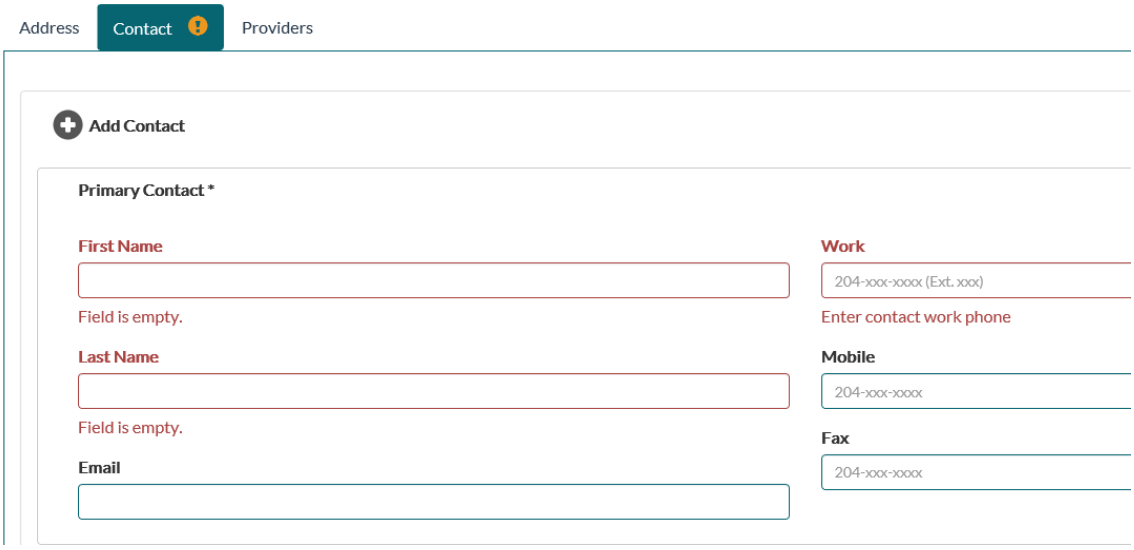


   b) If you are removing a Primary contact from your Home Clinic, highlight the contact name that you are removing and add the new contact info. (there is no 'X' to delete this, as there is for other contacts)

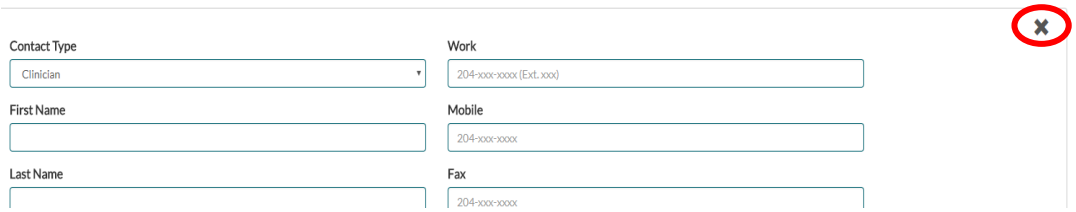


   **You cannot leave the Primary Contact fields blank. If you do, you will see this error and the fields will be red.





c) If you are removing a contact from your Home Clinic that isn't a Primary, select the ***X*** on the right-hand side of the screen.



d) Once you have completed your changes, return to the top of your window and click ***Save***.

6.3 Manage Provider Associations/Providers Tab

Over time, the composition of your Home Clinic may change as new providers join your team, providers retire, etc. It is important that the list of providers associated with your Home Clinic be kept current.

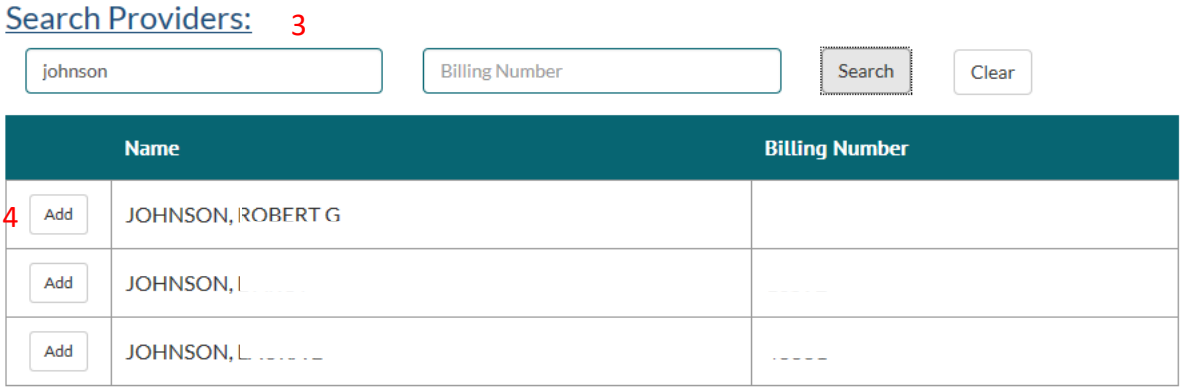
***Important Note:** Provider name changes will now update existing providers in the Home Clinic Portal automatically. No additional action is required or needed by the end user.

Getting Started

1. Log onto the Home Clinic Portal
2. Acknowledge the Confidentiality Statement by selecting ***OK***.
3. Select the appropriate ***Home Clinic*** name displayed on the Home page.

Associating a New Provider

1. Select the ***Edit*** button to update the Home Clinic record.
2. Select the ***Providers*** tab.
3. Enter information such as new provider's billing number, first, middle or last name in the search fields. Click the ***Search*** button.



4. Select the appropriate provider from the search results, and click the ***Add*** button at the left side of their row. The chosen provider will appear in a list below.

Name	Billing Number	Provider Type	Start Date
ProvTestWilliam, Kevin	SW8010	Family Physician	03-Nov-2021
Test, Wheaties	27219	Family Physician	02-Feb-2021

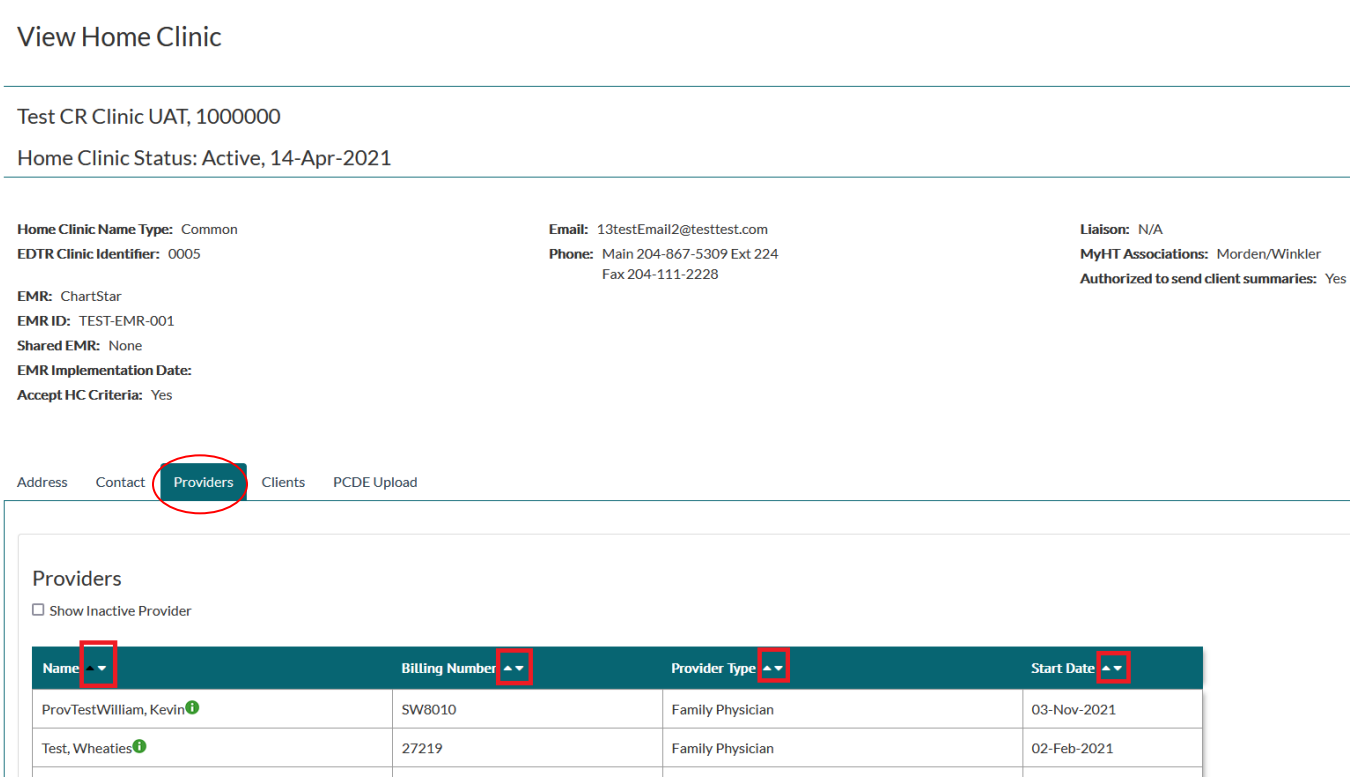
5. Select the Provider start date.

6. Repeat steps 3 – 5 as needed until all required provider associations are complete.

7. Select the ***Save*** button to register the updates.

NEW March 2022

New sorting arrows which allow users to sort providers by Name, Billing Number, Provider Type
and Start Date are now available in the View and Edit Home Clinic screens. By default, the list
of providers is sorted by Name instead of Billing Number.



View Home Clinic

Test CR Clinic UAT, 1000000

Home Clinic Status: Active, 14-Apr-2021

Home Clinic Name Type: Common
EDTR Clinic Identifier: 0005

EMR: ChartStar
EMR ID: TEST-EMR-001
Shared EMR: None
EMR Implementation Date:
Accept HC Criteria: Yes

Email: 13testEmail2@testtest.com
Phone: Main 204-867-5309 Ext 224
Fax 204-111-2228

Liaison: N/A
MyHT Associations: Morden/Winkler
Authorized to send client summaries: Yes

Address Contact Providers Clients PCDE Upload

Providers

☐ Show Inactive Provider

Name	Billing Number	Provider Type	Start Date
ProvTestWilliam, Kevin	SW8010	Family Physician	03-Nov-2021
Test, Wheaties	27219	Family Physician	02-Feb-2021

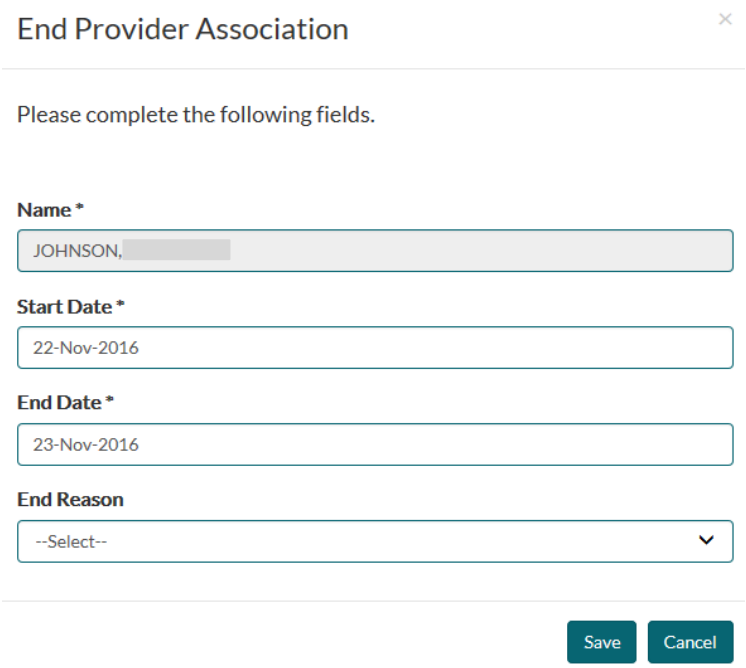
Ending a Provider Association

1. Select the ***Edit*** button to update the Home Clinic record.
2. Select the ***Providers*** tab.
3. Locate the provider to be disassociated from the Home Clinic in the Provider list.
4. Select the ***End*** button at the right side of the Provider's row. The End Provider Association pop-up window will display.

Providers:

Name	Billing Number	Provider Type	Start Date	End Prov Assoc
JOHNSON,		Family Physician	22-Nov-2016	End

5. Enter the ***End Date*** indicating when the Provider was disassociated from the Home Clinic.



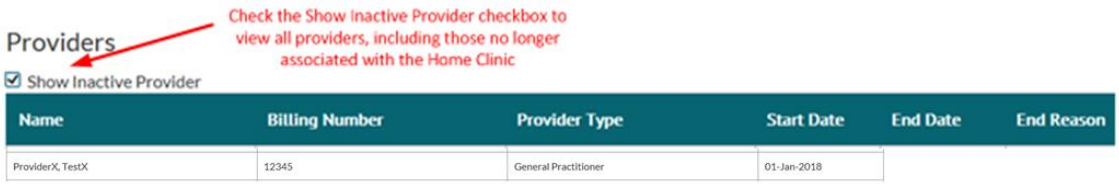
6. Enter the ***End Reason***, *if known.*

7. Click ***Save***.

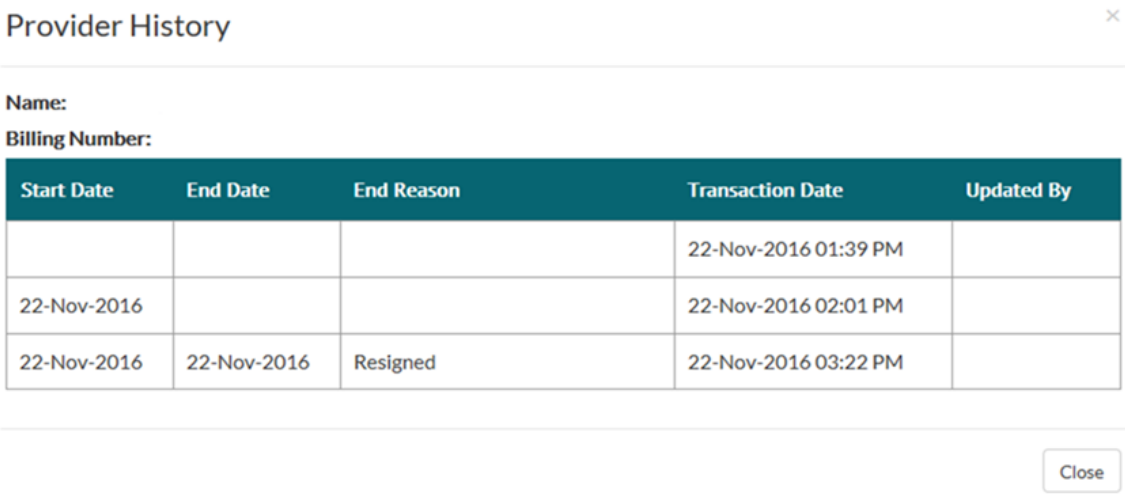
8. Select the **Save** button to register the updates.

6.4 View Provider History

1. Select the ***Home Clinic*** name from the Home page. The View Home Clinic page will be displayed.
2. Select the ***Providers*** tab.



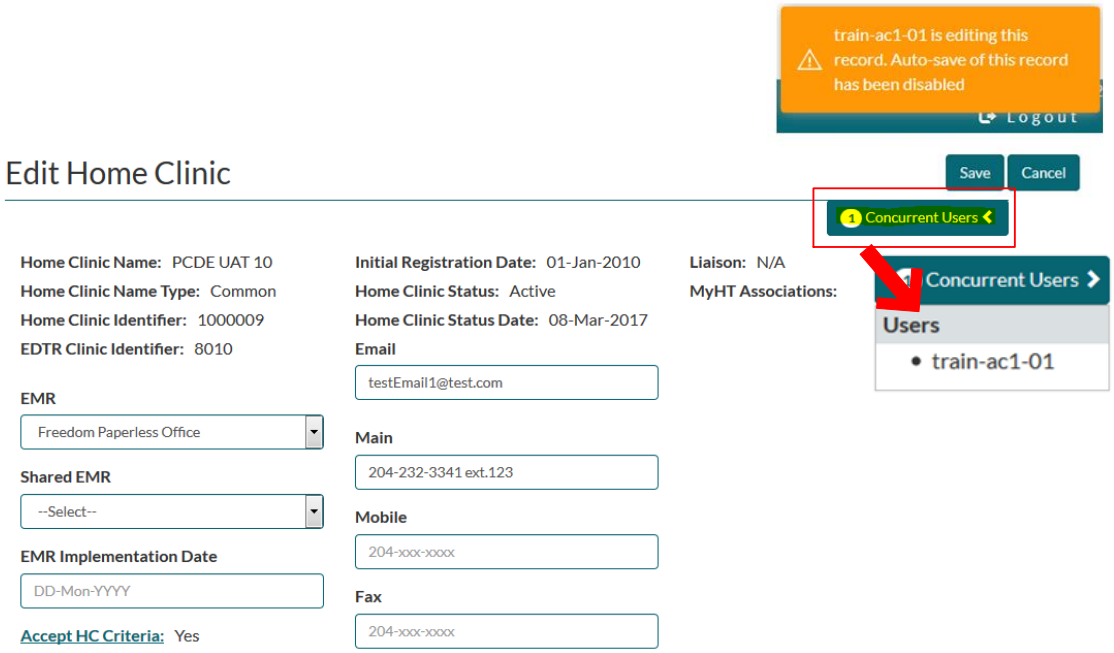
3. Click on the provider's row to view history. For example, a provider was associated to the Home Clinic for a period of time but is no longer associated. The Provider History window (illustrated below) will show this detail.



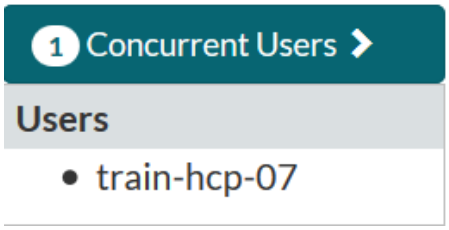
Start Date	End Date	End Reason	Transaction Date	Updated By
			22-Nov-2016 01:39 PM	
22-Nov-2016			22-Nov-2016 02:01 PM	
22-Nov-2016	22-Nov-2016	Resigned	22-Nov-2016 03:22 PM	

6.5 Concurrent Users

When more than one user is editing the Home Clinic details, there is a visual cue on the right side of the window advising how many users are currently editing the Home Clinic.



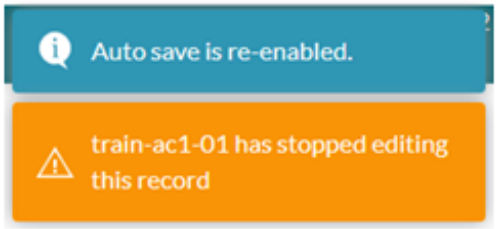
1. To view the list of User IDs currently editing the Home Clinic details, click on the arrow beside the number of concurrent users.



2. While there are concurrent users, the auto save function is disabled. When attempting to save your changes, you will have two options:
    a) Accept the changes made by other concurrent users. This will discard your changes.

b) Override the changes made by the other concurrent users. This will save your changes.

Once other concurrent users have finished editing the Home Clinic details, a notice will occur on screen to indicate there is one user left and the auto save function is re-enabled.



6.6 Home Clinic Status Inactive

When a Home Clinic status changes to Inactive, there are changes for users with the End User role;

- Restricted from updating client enrolment information related to that Home Clinic. This includes all functions performed in the Enrolment Wizard.
- Restricted from adding/updating providers associated to their Home Clinic.
- Maintain the ability to end provider associations with their Home Clinic.
- Continue to update all other information related to their Home Clinic such as address and contact info.
- Continue to be able to submit PCDE files without enrolment information being parsed from it.
- Continue to be able to perform normal enrolment functions for any other Home Clinics the user is associated to.
- Users in other roles related to this Home Clinic will not have their permissions changed.

7 Client Records

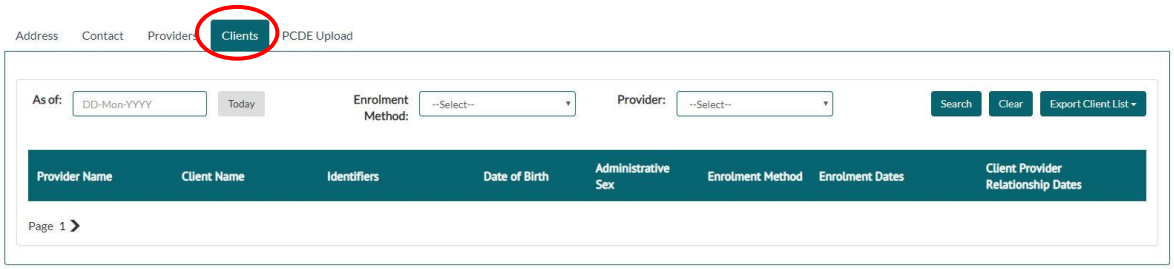
Enrolment of a client (i.e. patient) to a Home Clinic formalizes the relationship of that client to their primary care home base. Clients are subsequently associated to a health-care provider within the Home Clinic, as their Most Responsible Provider. As you can see, the client is at the

centre of both relationships – with the Home Clinic and their Most Responsible Provider. Therefore, the enrolment process begins with the client.

> **!** *Enrolling patients to your Home Clinic establishes a continuous relationship with your primary care practice. When you confirm this relationship through Active enrolment, it minimizes the risk of patients being enrolled elsewhere. Active patient enrolment directly involves the patient in the enrolment decision. The process involves direct communication (verbal or written) with the patient and ensures his or her understanding of the benefits of Home Clinic enrolment. Active enrolment can occur with new or existing patients, and with patients who were passively enrolled.*

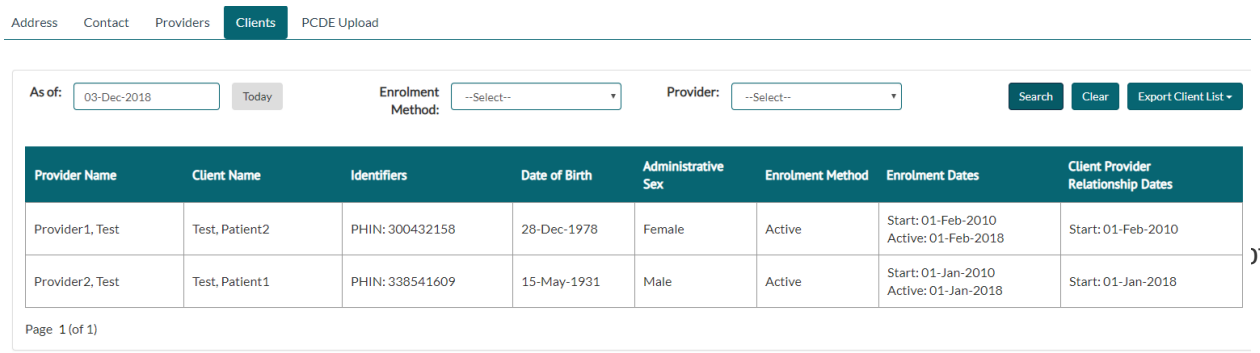
7.1 Clients Tab

The Client tab on the View Home Clinic screen allows you a view and export a list of all enrolled clients at your Home Clinic, as well as show who is associated and not associated to a main Primary Care Provider at your Home Clinic.

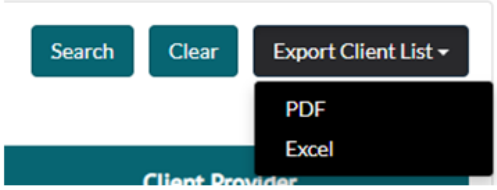


1. Select the ***Clients*** tab from the View Home Clinic screen.
   Within this tab there are various options for filtering. You can select an As of date, enrolment method (Passive or Active) and provider. The default will display today's date, both enrolment methods, and all providers associated to your Home Clinic.
2. Click the ***Search*** button to produce the list of enrolled clients based on any filters selected.

> **!** *Select a client from the list to move directly to that client's record and Enrolment History.*



3. Select ***Export Client List*** to export this list in PDF or Excel format.



> ***!*** *This exported list can assist your Home Clinic in identifying if there are differences in enrolment between your EMR and the Home Clinic Portal.*

7.2 Search Client

Many client records will be imported to the Home Clinic Portal using the PCDE. As a result, the first step in the client enrolment process is to search to confirm if there is an existing record in the system.

> ***!*** *When searching for a client, it is not recommended to use a client's name as bulk enrolments will not show the client's name.*

1. Select ***Client/Enrolment*** from the Home page menu bar. The Search Client page will display.

2. Enter demographic information about the client in the available fields. Including the client's Personal Health Identification Number (PHIN) or their health card number from another jurisdiction (Other Identifier fields) in your search criteria will retrieve the most accurate results. You may include as many details in the search area as you have available.

> ***!*** *To begin a new search, select the Clear button.*

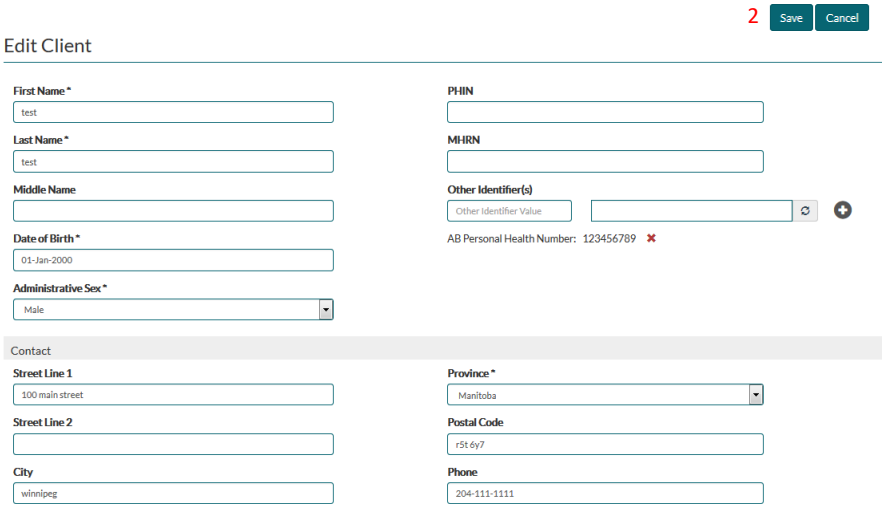
3. Complete the search action by pressing the ***Enter*** key on the keyboard or clicking on the ***Search*** button. If Home Clinic Portal does not contain a record that matches your search criteria, a message (No Client Found) will be displayed. You will need to add a client record or conduct a new search before you may proceed with enrolment. Once you click the ***Add*** button. The search criteria will be copied and pasted into a new record. You will not need to re-enter this demographic data.
   - If a client record within the Home Clinic Portal matches your criteria, it will be included in the Search Result window below. Click on the appropriate record in the list to view the client details.

Name	Identifier	DOB	Administrative Sex
test, test	AB Personal Health Number: 123456789	01-Jan-2000	Male

7.3 Edit Existing Client Record

If you located an existing record for your client in the Home Clinic Portal, you may wish to update their record to correct any missing or outdated information.

1. On the Client Details window, select the ***Edit*** button. The Edit Client window will display.



2. Edit the information as required and select ***Save***.

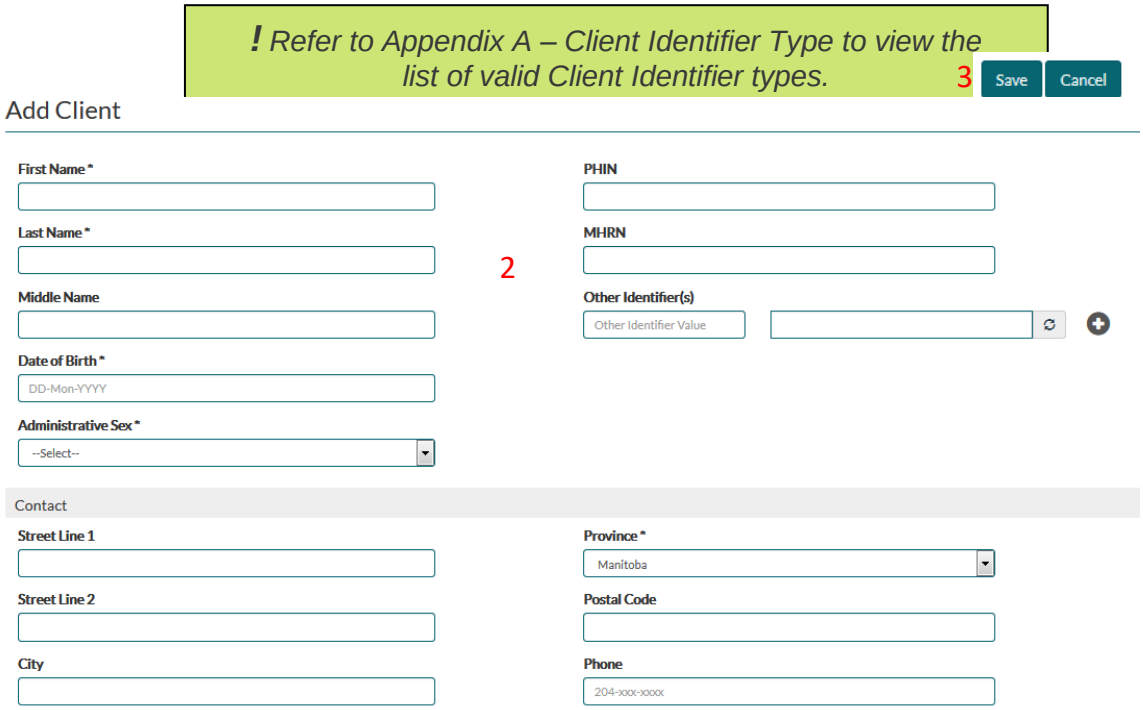
7.4 Add a Client

If you determine that the client you wish to enrol does not yet have a record in the Home Clinic Portal, you will need to add the record.

1. From with the Search Client window, select the ***Add*** button. The Add Client window will display.

2. Enter as much demographic information about the client as you have available. Note that you must enter either a Manitoba PHIN as the client's identifier or a unique client identifier (e.g. health card number) from another jurisdiction before you can save the client record.

> ***!*** *Refer to Appendix A – Client Identifier Type to view the list of valid Client Identifier types.*



3. Select ***Save*** to create the client record. The Client Details window will display all recorded details.

> ***!*** *The client's middle name can be very helpful when differentiating between clients with similar or common names* (e.g. Robert Smith).

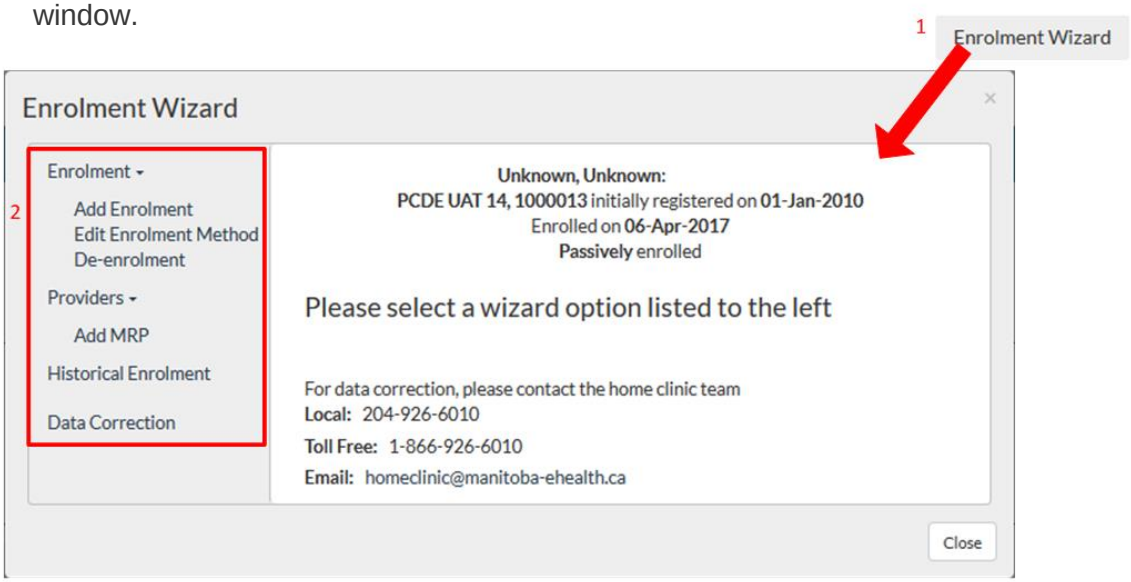
8 Client Enrolment

8.1 Add Enrolment

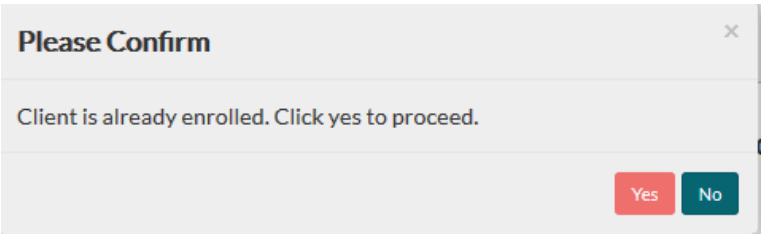
> ***!*** *The list of options in the Enrolment Wizard menu will change dynamically based on the conditions associated with the client currently being viewed. For example, if the client is not yet enrolled, De-enrolment will not be an option.*

A client must first be enrolled with the Home Clinic before a Most Responsible Provider may be associated.

1. From within the Client Details window, select the ***Enrolment Wizard*** button.
2. Select the ***Add Enrolment*** option from the menu on the left side of the Enrolment Wizard window.

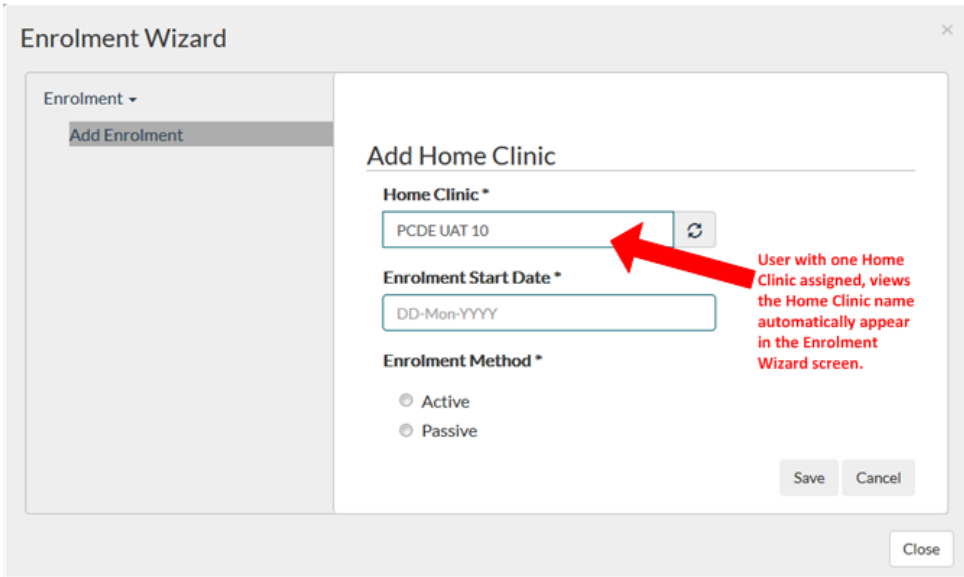


If the client is already enrolled at any Home Clinic, a message will display. To continue enrolling them to your Home Clinic, simply click ***Yes***.



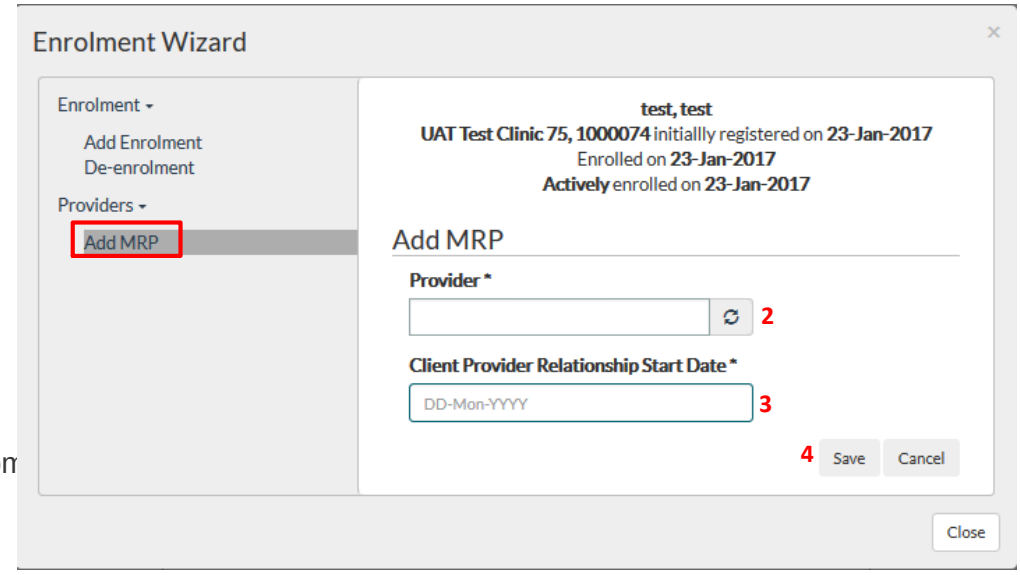
Message appears if client is currently enrolled at any Home Clinic.

3. Within the Add Enrolment wizard, confirm the ***Home Clinic*** to which the client is enrolled. If you have access to multiple Home Clinics, you will need to select the appropriate Home Clinic from the drop-down list.

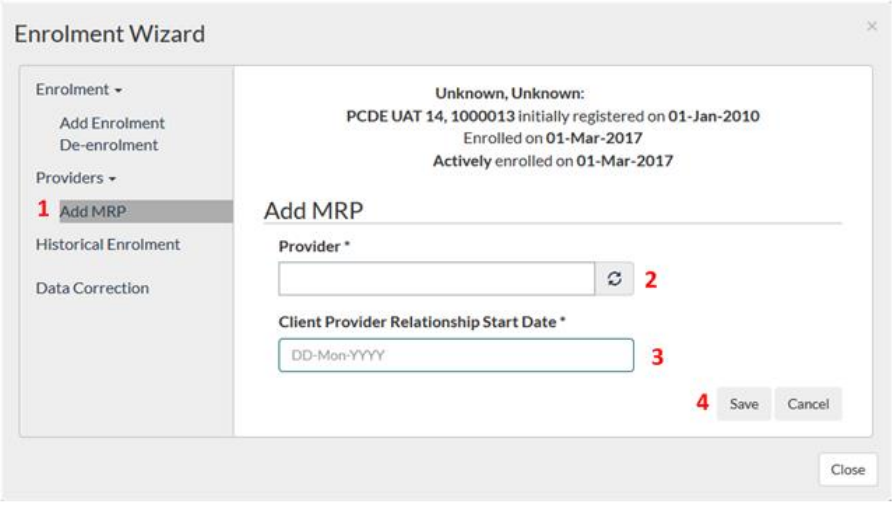


8.2 Add a Most Responsible Provider

1. To associate an MRP for this client, select ***Add MRP*** from the Enrolment Wizard Providers menu. The Add MRP wizard will display the existing client enrolment data in the wizard header.



2. Select the ***Provider*** using the drop-down list. The list will only contain providers who are currently associated to the Home Clinic shown in the wizard header.
3. Enter the date the provider was associated to the enrolled client in the ***Client Provider Relationship Start Date*** field. Refer to the General Tips section for information on the calendar feature. If the Provider's Start Date (ie. Association) with the Home Clinic is after the Home Clinic's initial registration date, the Client Provider Relationship Start Date must be greater than (i.e. more recent than) the Provider's association date with a Home Clinic.



4. Select ***Save***.

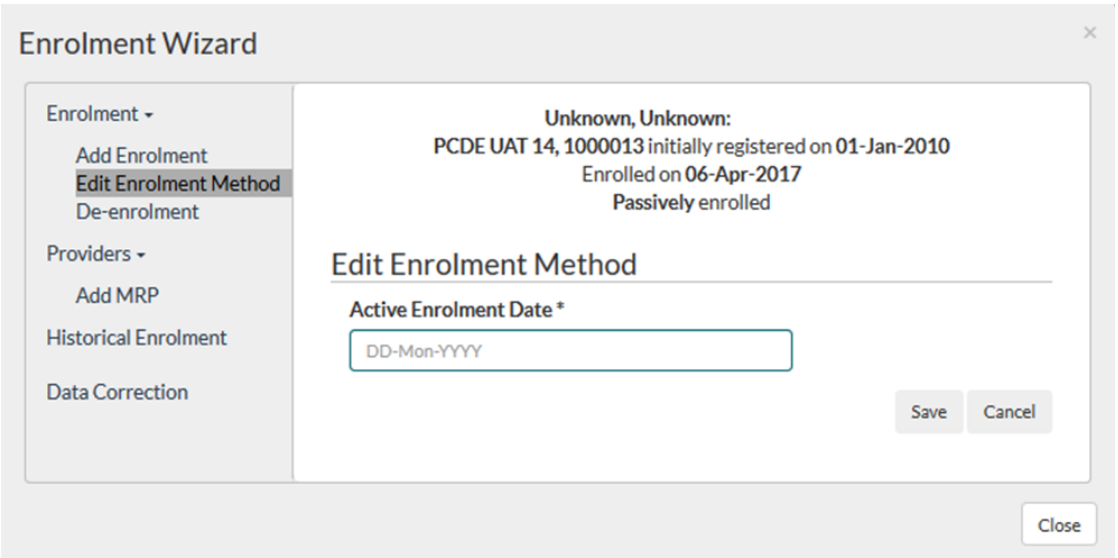
8.3 Edit Enrolment Details

Over time, enrolment details may change for a client. Details that may be edited include:

- Change of Enrolment Method from Passive to Active
- MRP changes including ending a client-provider relationship or adding a new MRP
- De-enrolment of client from Home Clinic

8.3.1 Edit Enrolment Method

1. Select the ***Edit Enrolment*** option from the Enrolment Wizard menu.



2. You may only edit the Enrolment Method for clients who are currently "passively" enrolled as indicated in the header. To change the client from Passive to Active Enrolment, enter the ***Enrolment Start Date*** (the date on which the client agreed to enrol with the Home Clinic). If you accidentally enrolled the patient "actively" but meant to indicate passive enrolment, contact the Home Clinic team for a correction.

> ***!*** *If you need to correct a client's Enrolment Method (e.g. from Active to Passive), contact the Home Clinic team for help with the data correction.*

8.3.2 Change MRP

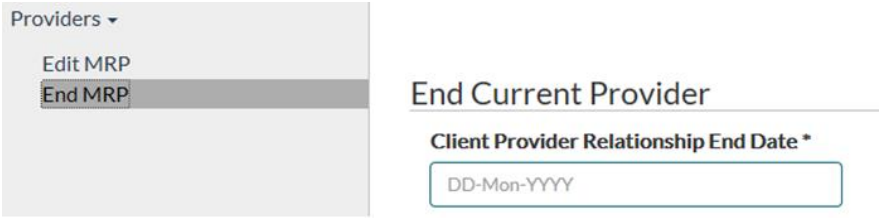
1. Select the ***Edit MRP*** option from the Enrolment Wizard menu. Adding a new MRP will automatically end the relationship between the client and the existing MRP (the start date of the new Client Provider relationship less one day will be used as the end date for the prior relationship).
2. Select the ***Provider*** using the drop-down list. The list will only contain providers who are currently associated to the Home Clinic shown in the wizard header.
3. Enter the date the provider was associated to the enrolled client in the ***Client Provider Relationship Start Date***. Refer to the General Tips section for information on the calendar feature.

4. Select ***Save***.

8.3.3 End MRP

> ***!*** *If there is a break between the end MRP and the start of a new MRP, consider ending the old MRP first.*

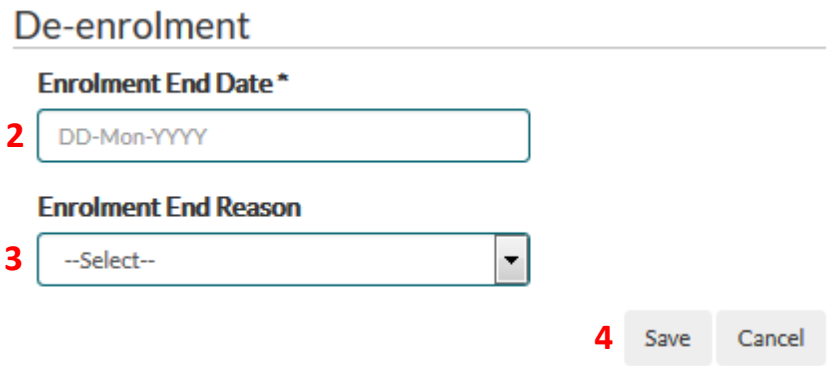
1. Select the ***End MRP*** option from the Enrolment Wizard menu.



2. Enter the date the MRP association with the enrolled client ended in the ***Client Provider Relationship End Date*** field. Refer to the General Tips section for information on the calendar feature.
3. Select ***Save***.

8.3.4 De-Enrol Client

1. Select the ***De-enrolment*** option from the Enrolment Wizard menu.

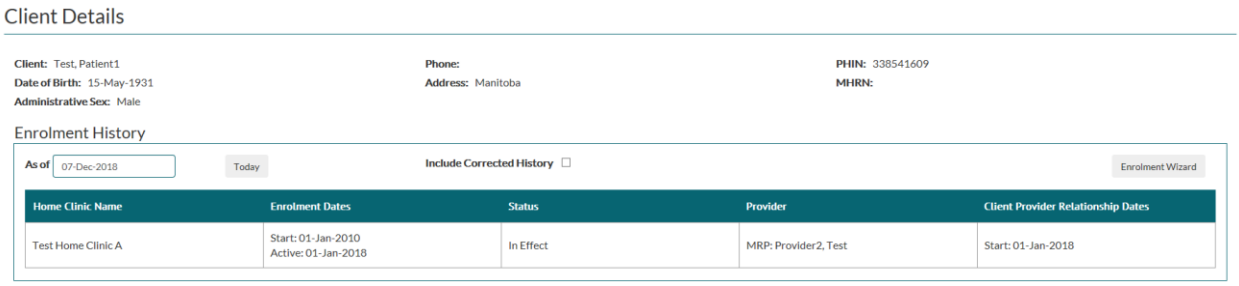


2. Enter the date on which the client's enrolment with this Home Clinic ended in the ***Enrolment End Date*** field.
3. If known, enter the reason for de-enrolment in the ***Enrolment End Reason*** field.
4. Select ***Save***.

8.4 View Client Enrolment Details

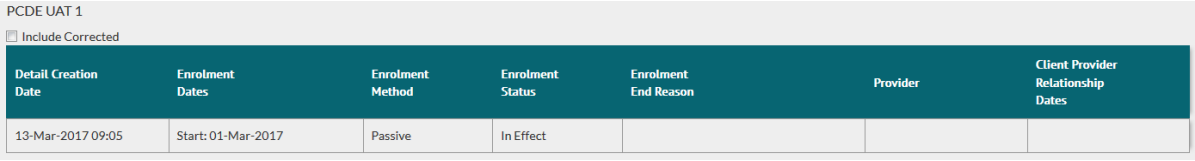
Client enrolment details are available within the Client Details window for any enrolled client.

1. Simply search for the client (refer to section 5.1 for instructions) and click on the appropriate search result to view details. The ***Enrolment History***, if relevant to the client, will appear in the lower portion of the Client Details window.



> ***!*** *Users are only permitted to view enrolment history details related to Home Clinics for which they have security permission. In all other cases, users will be able to view the Enrolment Start Date and the Enrolment Status, but the Home Clinic Name and Provider name will be protected. "Not authorized" will display in these cases.*

2. Further detail is available by selecting a row within the Enrolment History. Click to select a row. The Enrolment Details window will display. Data in the Enrolment Details window is limited to an individual Home Clinic as noted at the top, left of the window.



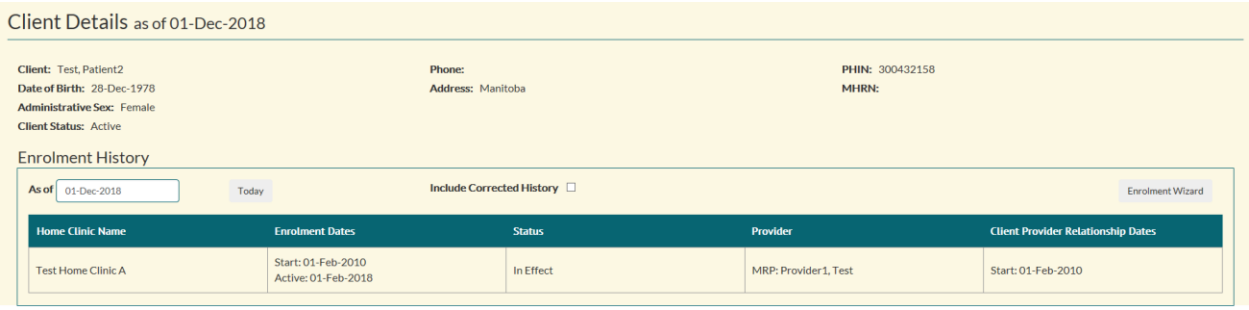
Details associated to the client's enrolment history with the selected Home Clinic will display. Information such as Enrolment Method and Transaction Date are available.

3. Simply click ***Close*** to close the Enrolment Details window and return to the Client Details with Enrolment History.

8.5 'As Of' Enrolment

You have the option to select a previous calendar date when viewing client enrolment information. This permits you to know what state the client enrolment was in on a particular day in the past.

1. To select a past date, click the ***As Of*** field and select the day, month and year. The default value is the current calendar date.
2. The information will update on the screen once the date has been selected. The screen becomes shaded to remind you that a past date is being viewed.

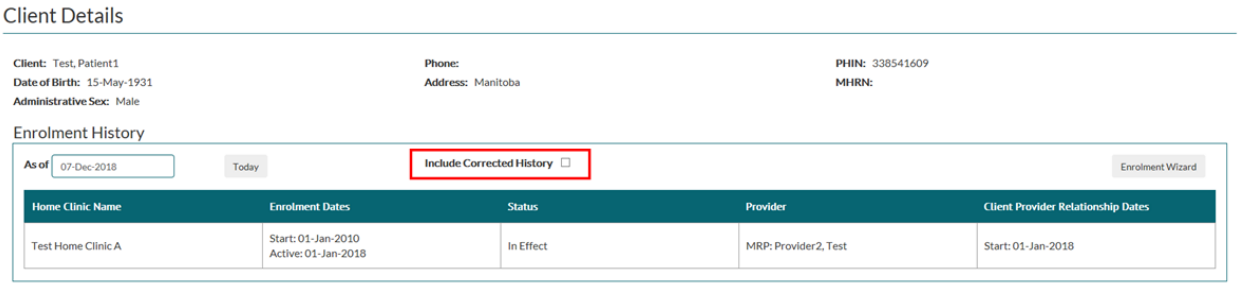


3. When viewing the Enrolment Wizard with the ***As Of*** date selected, you will see the enrolment as it looked on the selected date. Changes that occurred after the chosen date will not be reflected in this view.
4. Select the ***Today*** button to reset the Enrolment Wizard information displayed.

8.6 Include Corrected History

The Client Enrolment History screen displays summarized enrolment information for a client. You may choose to view the corrected enrolment history for a client, which permits you to see a client's complete enrolment history.

1. Select the ***Include Corrected History*** button to view the client's full enrolment history.



2. De-select the ***Include Corrected History*** button to reset the enrolment information displayed.

8.7 Historical Enrolment

In the rare circumstance you have past enrolment details to enter for a client, you may use the Historical Enrolment section of the Enrolment Wizard. Please contact the Home Clinic team for more information on when to use this section.

a) Select Historic Enrolment from the Enrolment Wizard selection list.

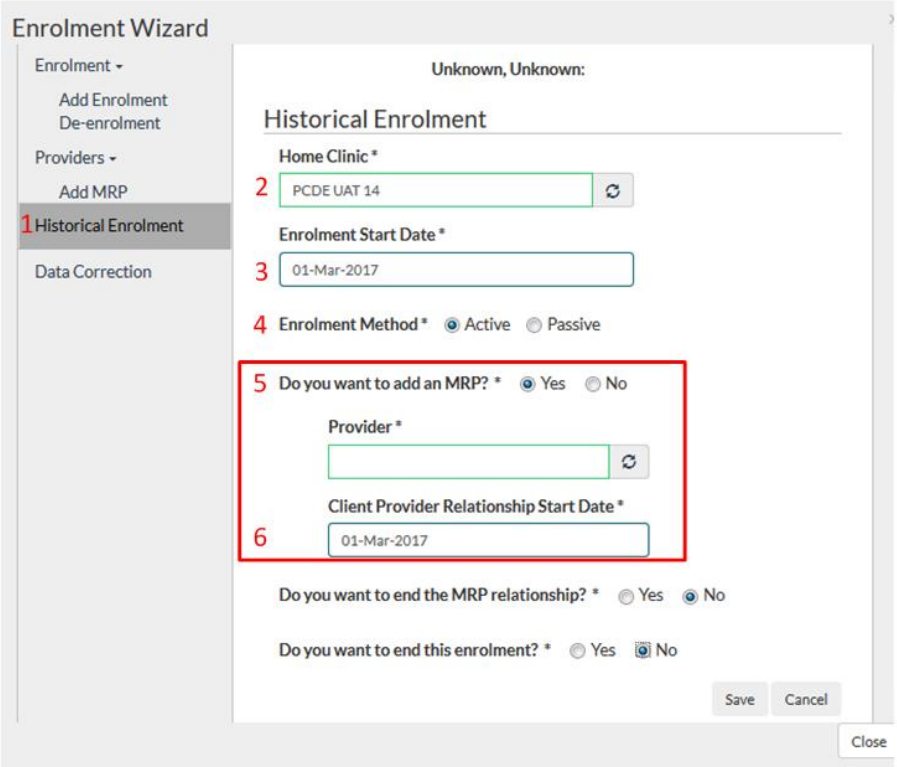
b) Select your Home Clinic. Only Home Clinics you are associated with will be available for selection.

c) Specify the ***Enrolment Start Date***.

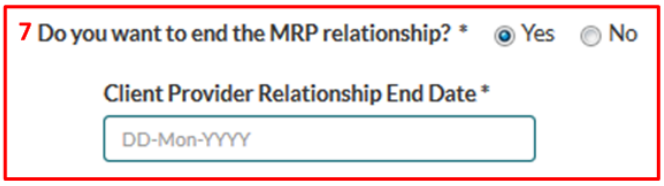
d) Indicate the ***Enrolment Method*** (either Passive or Active).

e) To add an MRP (if applicable), select ***Yes***. An expanded section appears for you to select the ***Provider*** using the drop-down list. The list will only contain providers who are currently associated to the Home Clinic shown in the Enrolment Wizard header.

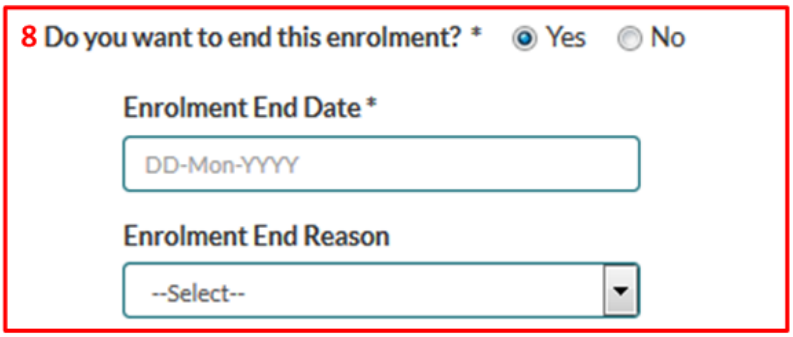
f) Enter the ***Client Provider Relationship Start Date***. The Client Provider Relationship Start Date must be more recent than the Provider's association date with the Home Clinic.



g) To record the end of the ***Client Provider Relationship***, select **Yes** and select the end date. If the ***Client Provider Relationship*** is not ending, select ***No***.

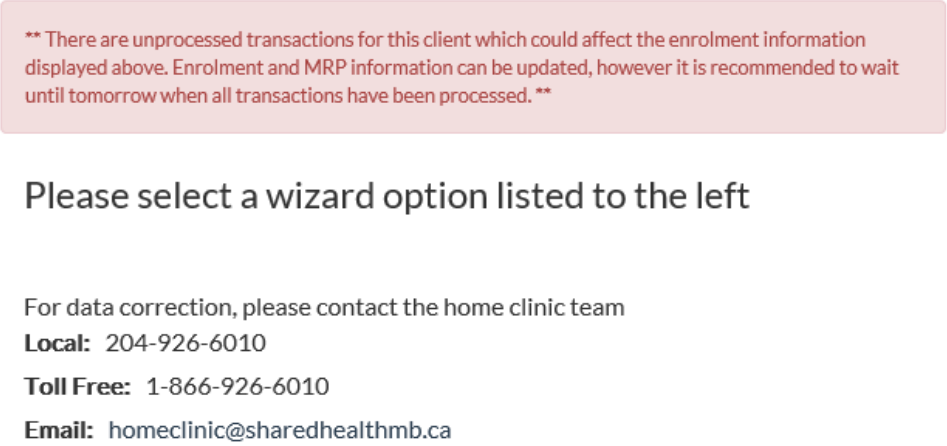


h) To record the end of the client enrolment, select ***Yes***. If the client enrolment is not ending, select ***No***.



a) Click ***Save***.

b) A message will appear on screen confirming that your changes have been received. These changes will be processed overnight.

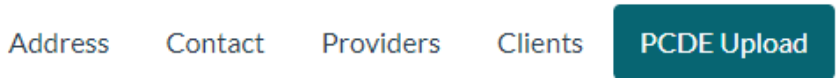


9 Submitting the Primary Care Data Extract (PCDE)

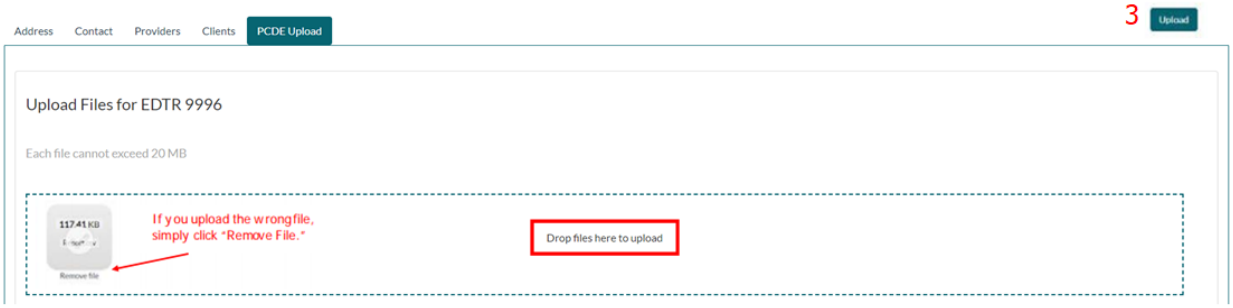
The PCDE extracts data from discrete data fields in the EMR to support submission of patient demographic, prevention and chronic disease information related to the Manitoba Primary Care Quality Indicators (PCQIs). Eligible Home Clinics use the Home Clinic Portal to upload and submit their PCDE.

9.1 Uploading the PCDE

1. Select the ***PCDE Upload*** Tab. This will be visible on the View Home Clinic page for Home Clinics that use the Home Clinic Portal to submit the PCDE.



2. Drag and drop the PCDE files to the upload area indicated by “drop files here to upload” or alternatively click in the upload area and search for your save PCDE files. Each file will be displayed and the file size will be denoted.



3. Once the appropriate files are displayed in the upload area, select the ***Upload*** button to submit the files. The files will disappear once they are uploaded. Home Clinics will receive an email confirmation indicating files were received.

9.2 Using the PCDE for Ongoing Enrolment

Some Home Clinics use the PCDE to submit enrolment information on an ongoing basis. Further information can be found on the Using the Primary Care Data Extract for Enrolment page of the Digital Health, Shared Health Home Clinic Site.

Home Clinics that use the PCDE for ongoing enrolment will see a ***Processed Extract*** section in the ***PCDE Upload*** tab. This section is illustrated and described below.

Indicates the number of rejections that resulted from this processed extract.

The number of rejections that remain on the Pending Activities page, and are not marked as remediated.

Processed Extract

EDTR Clinic ID	Extract Processed Date	Enrolment Rejections	Outstanding Rejections
8005	15-Mar-2017	0	0

Processing the PCDE for enrolment purposes may take up to two days, therefore, there is a delay between the submission of the PCDE and the processed extract displaying in this section. The last (i.e. most recent) PCDE submitted for ongoing enrolment will be displayed in the ***Processed Extract*** section once enrolment data is successfully processed. Home Clinics associated with more than one EDTR Clinic ID will see one row for each ID. Clicking on a row will take you directly to the ***Pending Activities*** page to view rejection details.

10 Notifications

Users of the Home Clinic Portal may receive a one-time email notification after the processing of their bulk enrolment data related to:

- Enrolment data within Primary Care Data Extract records that did not pass standard processing rules. These are known as rejections.
- Enrolment records containing an Enrolment Start Date that is the same as the Enrolment End Date with the same Home Clinic.

Users may also be sent a weekly email containing any rejections and/or de-enrolments that occurred during the previous week, on Sunday evenings. An example of a notification is provided below.

Home Clinic Portal

Your Primary Care Data Extract enrolment records were processed. Rejections are available for your review and remediation. Please log into the Home Clinic Portal at your earliest opportunity to review.

You are receiving this email because you are a user of the Home Clinic Portal Website.

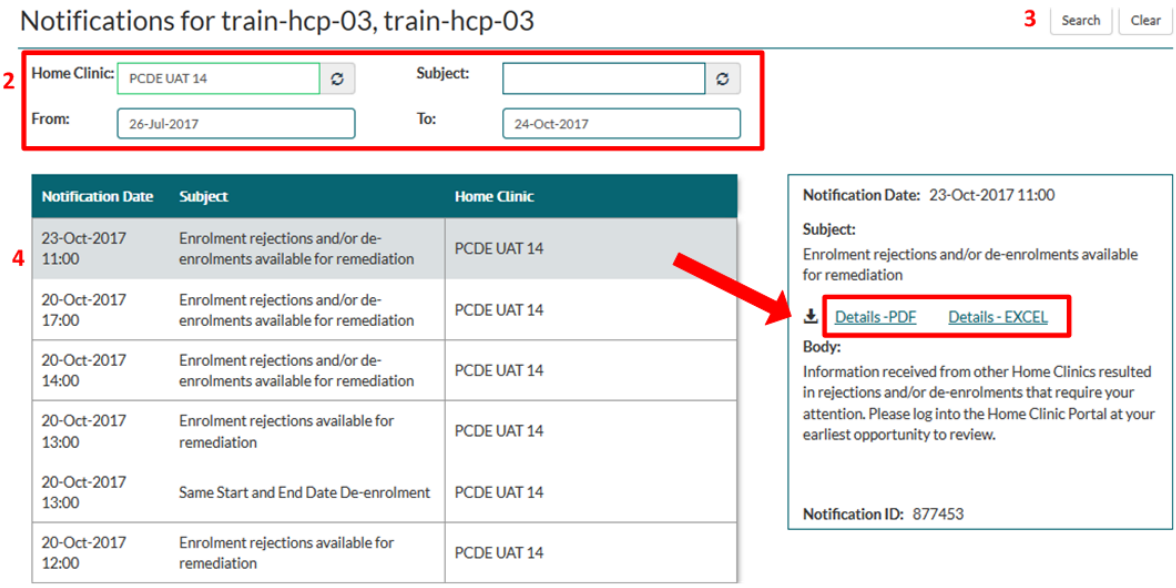
Visit The Home Clinic Portal

Click to log into the Home Clinic Portal

Email notifications are sent periodically, so it is important to note that an email notification may

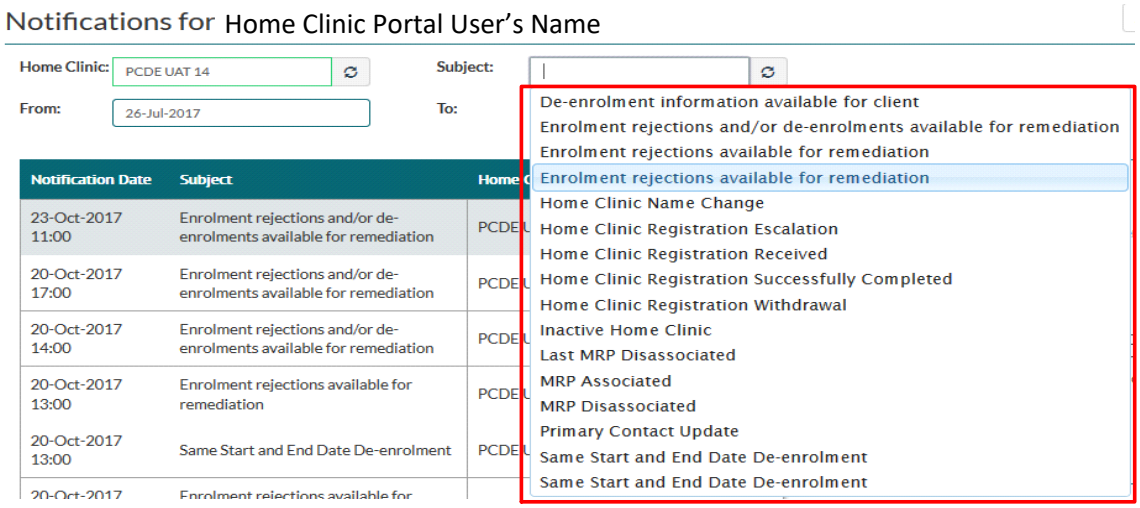
> **!** *For Home Clinics using the Enrolment Service, notifications received directly in the EMR will not be included in the **Notifications** area of the Home Clinic Portal.*

relate to many records or a single record. Email notifications include summary data only to ensure compliance with the *Personal Health Information Act* (PHIA) as illustrated below.



10.1 View Notification Details

1. Select ***Notifications*** from the Home page menu bar. Note: The list of notifications is specific to an individual user of the Home Clinic Portal. Depending on the user role, there could be differences between each user's lists.
2. Use the filters across the top of the ***Notifications*** window to narrow the list of messages. Options include Home Clinic (name), notification Subject (select from drop down list) or a date range (From and To dates). The date range defaults to 3 months from the current date. Note: Home Clinic (name) is useful for users associated with multiple Home Clinics.



3. Click the ***Search*** button.
4. Notifications will be amalgamated into a single entry by Date Sent and Subject. Click on a specific notification to display the details for that notification. The details for the highlighted notification will display to the right of the window. Select ***Details – PDF*** or ***Details – Excel*** to produce the ***Notification – Detail Report***.
5. The ***Notification - Detail Report*** provides greater detail concerning the selected notification row. It will list the clients associated with the notification. You may download the report in either PDF or Excel format.

! The ***Notification – Detail Report*** *will not include notification detail for rejection type RCUI – Client Unidentifiable since the client cannot be identified. For Home Clinics using the Enrolment Service, this report will not include enrolment submission errors returned to the EMR.*

11 Remediating Enrolment Records

A critical, ongoing activity for Home Clinics is to remediate enrolment records that were rejected or automatically de-enrolled based on Home Clinic Portal processing rules. Home Clinic Portal users may review specific details related to these records in the portal prior to correcting the data in their EMR.

1. Access information related to enrolment rejections and automatic de-enrolments by either:
   a) Clicking on the number of Rejections or De-enrolments in the Pending Activities area of the Home page.

My Home Clinic(s)

Pending Activities

	Rejections	De-enrolments
PCDE UAT 10	3	0
PCDE UAT 13	22	0
PCDE UAT 14	166	47

b) Selecting the Pending Activities button on the top right of the View Home Clinic page.

c) Clicking the PCDE Upload tab (Note: this option is only available to Home Clinics that are eligible and use their PCDE for enrolment.)

Address Contact Providers PCDE Upload

Upload Files for EDTR 8001

Each file cannot exceed 20 MB

Drop files here to upload

Note: Processing may take up to 2 days

Processed Extract

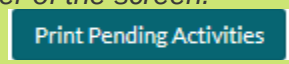
EDTR Clinic ID	Extract Processed Date	Enrolment Rejections	Outstanding Rejections
8001	31-Oct-2018	27	27

The Pending Activities window will be displayed. Records that are not yet marked as “corrected” will be displayed in ascending date order. The window displays a Type filter (i.e. Rejection or De-enrolment).

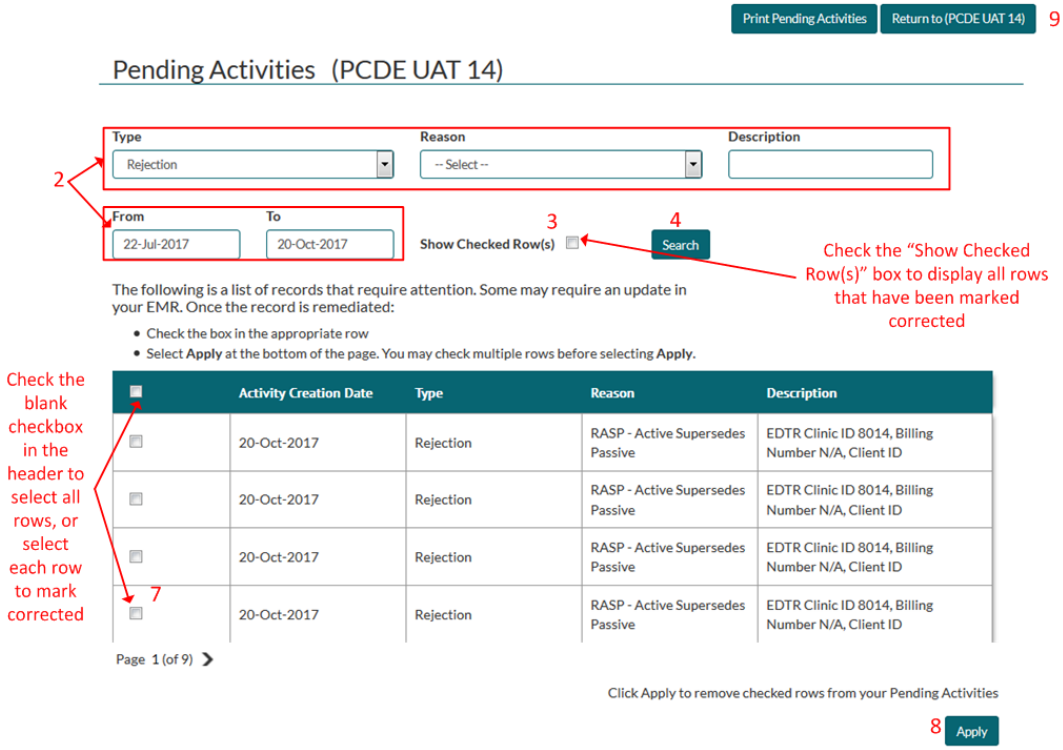
Note: If you access this window by clicking on the PCDE Upload tab, the Type filter automatically populates either the rejection or de-enrolment list of activities, based on which link you clicked. The window also displays a Reason filter, which contains a list of reasons associated with the selected Type. If no Type is selected, the Reason filter remains blank. The Description filter can be used to track the specific Client ID or EDTR Clinic ID value from which the rejection or de-enrolment resulted. You may change the filters at any time.

2. Enter criterions to filter the list for a specific record or group of records. Options include **Type** (rejection or de-enrolment), **Reason** (related to either Rejection or De-enrolment Type), **Description** (Client Identifier [e.g. PHIN or other health card number] or Client Last and/or First Name) and a date range (**From** and **To** dates). Note: the default date range is 3 months from the current date.
3. You may choose to show/hide corrected rows by checking the **Show Checked Row(s)** box. Checked rows will display shaded and will have a checkmark beside them. The user who checked the row will also appear in the User column.
4. Click the ***Search*** button. Search results will display in the window below.
5. The Pending Activities table displays all records within a 3 month period from the current date which require review and possible remediation. When necessary, the from date can be changed to review if there are any Pending Activities prior to the last 3 months. Check off the row once the record has been reviewed and where necessary remediated in your EMR.
    a. Some items will display the Extract Processed Date in the Description column. There will be no more than twenty (20) activities displayed at a time in the table. Click on the page numbers at the bottom left of the table to move to the next page if required.

! *To print a PDF list of outstanding Pending Activities, click on the Print Pending Activities button in the upper right corner of the screen.*



6. Where necessary, correct the record in your EMR.
7. Mark the record as remediated in the Home Clinic Portal by checking the box at the left side of the record. You can mark all records within the currently displayed list by checking the box in the table header.
8. Click the ***Apply*** button to mark the remediation as corrected. Records marked as corrected will no longer display in the results list.



9. Select the ***Return to Home Clinic*** button to close the Pending Activities window.

> **!** *For Home Clinics using the Enrolment Service, enrolment submission errors returned to the EMR in real-time are not displayed in the* ***Pending Activities*** *area of the Home Clinic Portal.*

12 Scheduled Reports

For information regarding the operational and analytic reports available to registered Home Clinics, review our Home Clinic Reporting overview.

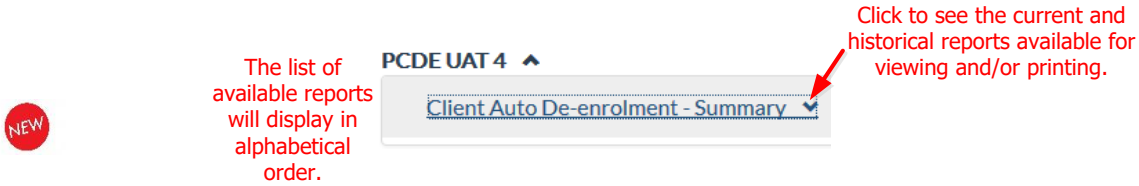
Available in Excel or PDF format, the Scheduled Reports are run either weekly or monthly (depending on the report) and retained in the Home Clinic Portal for 6 months. Beyond that, clinics can request historical information from the Home Clinic Team.

List of all Scheduled Reports:

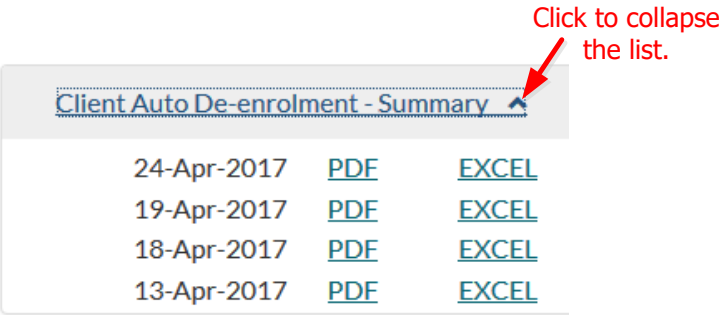
- Client Auto De-enrolment – Summary
- Client Auto De-enrolment by MRP – Detail
- Client Validation
- COVID-19 Unvaccinated Clients (use to generate info prior to March 6, 2022)
- COVID-19 Unvaccinated and Unboosted Clients (use as of March 6, 2022) **NEW!**
  *see further info about this report below
- Enrolled Clients Associated to and Not Associated to a MRP – Summary
- Enrolled Clients Not Associated to a MRP – Detail
- Enrolled Client by Provider Association – Summary
- Home Clinic Client Enrolment – Summary
- Home Clinic Enrolment Rejections by Provider – Detail
- Home Clinic Provider – Details
- Pending Active Client Enrolment – Detail
- Pending Active Client Enrolment - Summary

12.1 View, Print or Export Scheduled Reports

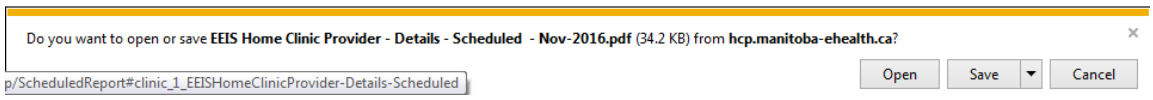
1. Select ***Scheduled Reports*** from the Home page menu bar. A list of the available reports will be presented. Note: if you have access to multiple Home Clinics, reports will be grouped by clinic name.



2. Click the down arrow next to the report name to see a list of the current and historical reports by report run date.



3. Select the PDF or EXCEL option next to the report date for the desired report. A pop-up window will display offering the choice to Open or Save the report results.



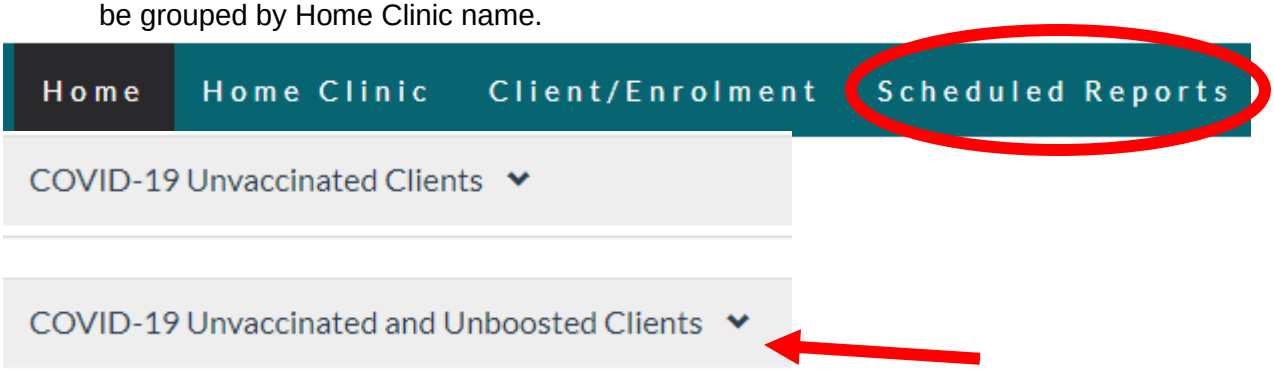
4. Select ***Open*** to view the report result or ***Save*** to store a copy of the report results. If you chose Open, the report results will be displayed.

If viewing in PDF, use the standard PDF toolbar to view (zoom in/out, next page, etc.) and print the report.

If viewing in EXCEL, you will need to select the ***Enable Editing*** button to work with the data (filter, sort, etc.) or to save a copy.

12.2 Generating the new COVID-19 Unvaccinated and Unboosted Clients report

1. Select ***Scheduled Reports*** from the Home page menu bar. A list of the available reports will be presented. Note: If you have access to multiple Home Clinics, reports will be grouped by Home Clinic name.



Please note as of March 6, 2022 please select the second report

2. Click the arrow next to the report name to see a list of the current and historical reports, by report run date.
3. Select either PDF or Excel formats to generate the report results. Generation of the results may take a few seconds.
4. Use the tools available when viewing the document to page up or down, print or save.

   Report includes a provider-based and age-grouped list of unvaccinated and partially vaccinated patients **<u>with the addition of those age 18+ who have NOT received a third dose/booster</u>** whose last dose >6 months and are not scheduled to receive a COVID-19 vaccination in the next 30 days.

First Dose Date	First Dose Vaccine	Second Dose Date	Second Dose Vaccine	Anticipated Action

The Anticipated Action column will include:

- DISCUSS FIRST, SECOND, or THIRD DOSE based on the patient's vaccination status and;

- DETERMINE NEXT DOSE when the patient is identified as receiving either a non-Health Canada approved COVID-19 vaccine, a COVID-19 treatment or other dose variations. Further review may be required.

As of the report date, patients must be:

- ENROLLED to your Home Clinic (source: Home Clinic Portal),
- 5 years and older,
- NOT had a COVID-19 vaccination (source: PHIMS), OR
- HAVE received one dose of a COVID-19 vaccine (source: PHIMS), OR
- 18+ years fully vaccinated and NOT had a COVID-19 booster/third dose with the last dose being >6 months (source: PHIMS),
- NOT have a vaccination appointment at a super-site or pop-up clinic in the next 30 days (source: PetalMD).

Limitations:

- Patients may be included in the list:
  - If they have scheduled a vaccination at a primary care clinic or pharmacy;
  - If they recently received a dose which is not yet recorded in PHIMS;
  - If they recently cancelled or re-scheduled a vaccination appointment (PetalMD);
  - If they recently passed away and their deceased status has not yet been recorded in the Manitoba Health Insurance Registry.
- Please be aware that the primary series for immunocompromised patients may be 3 doses. Therefore, immunocompromised patients due for their booster/4th dose will not appear in this report. These patients require special consideration.
- Patients may or may not be included in this report if their immunization record contains errors. Once the errors are corrected in PHIMS, the information will be reflected in this report.

13 Deceased Clients

Deceased patient information will be processed in the Home Clinic Repository soon after Client Registry receives death information from a hospital or MHSC, resulting in notification to the Home Clinic during the usual nightly run of enrolment records. On an ongoing basis you will receive additional remediation messages related to rejections and/or notifications regarding your deceased patients.

To support identification and management of this new information, four Enrolment Reason Code Definitions will be available to assist Home Clinics in the de-enrolment of deceased patients:

DCDE – Client Deceased
Your Home Clinic had an enrolment for a client that is now deceased. **De-enrol the client in the EMR** using the given Deceased Date as the Enrolment End Date and include the reason as Deceased for de-enrolment.

RCDE – Client Deceased
Your Home Clinic submitted an enrolment that was not processed due to the client being deceased. Mark the client as deceased in the EMR and **remove the enrolment**.

NCDU – Client Deceased Information Update
Your Home Clinic had a historical enrolment for the client that is now deceased. Mark the client as deceased in the EMR (you will receive this notification for all existing enrolments for deceased clients as well as, for any deceased client where at one time was enrolled to your Home Clinic).

NCER – Client Enrolment Reinstated
Client was previously noted as deceased and this status has now been reinstated to not deceased. **Re-enrol the client in the EMR** as deceased status has been reinstated to not deceased.

If your Home Clinic has implemented the **Enrolment Service**, you will receive remediation messages directly in your EMR. To access them in the Home Clinic Portal, please access via Pending Activities https://sharedhealthmb.ca/files/home-clinic-remediate-enrolment.pdf The enrolment reason codes will assist you with correcting the date in your EMR.

NEW Home Screen – ***Notices*** column

Under Pending Activities section of the Home screen, the ***Notices*** column displays the number of notices received for each Home Clinic.
The Pending Activities screen can be accessed by clicking on the number of notices.

Shared health
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Manitoba

Home Clinic Portal

Home | Client/Enrolment | Scheduled Reports | Notifications

My Home Clinic(s)

Pending Activities

	Rejections	De-enrolments	Notices
Test CR Clinic UAT	35	75	41

System Notifications

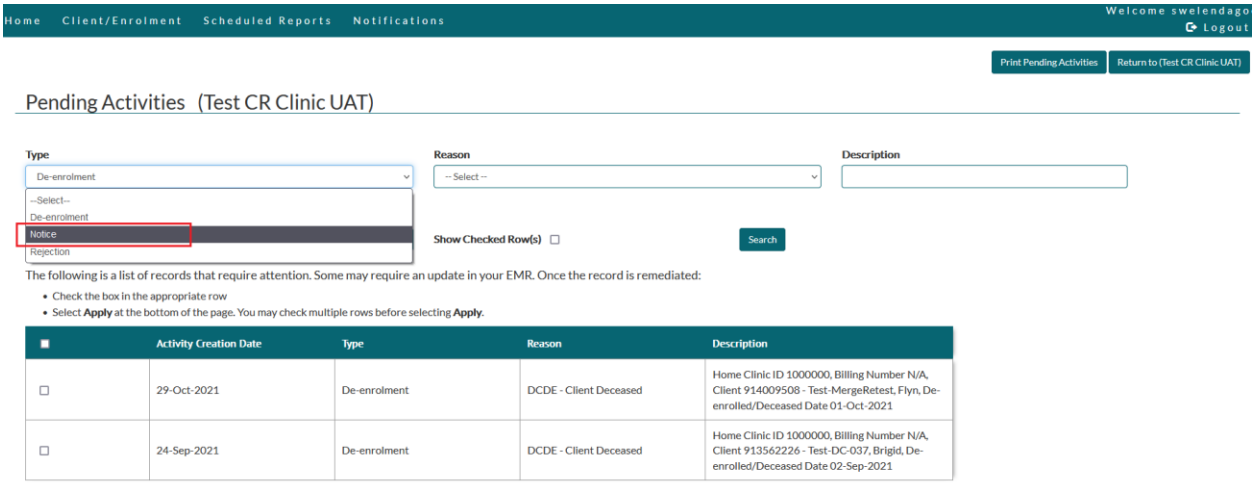
Looking for Support?

Home Clinic Team
Local: 204-926-6010
Toll Free: 1-866-926-6010
Email: homeclinic@sharedhealthmb.ca
Website: https://sharedhealthmb.ca/health-providers/digital-health/home-clinics/

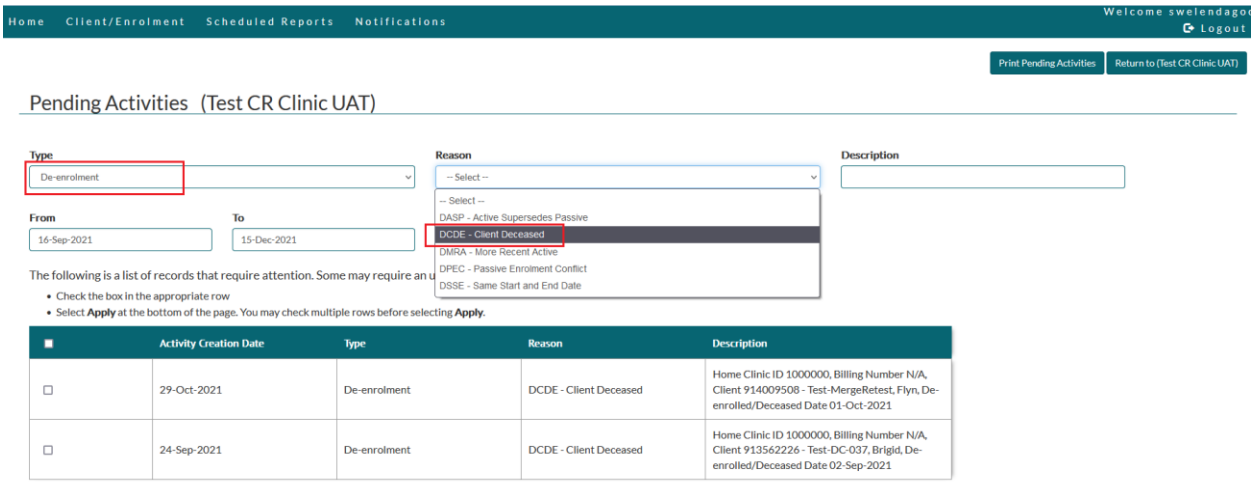
Service Desk
Local: 204-940-8500
Toll Free: 1-866-999-9698
Email: servicedesk@sharedhealthmb.ca

Pending Activities Screen

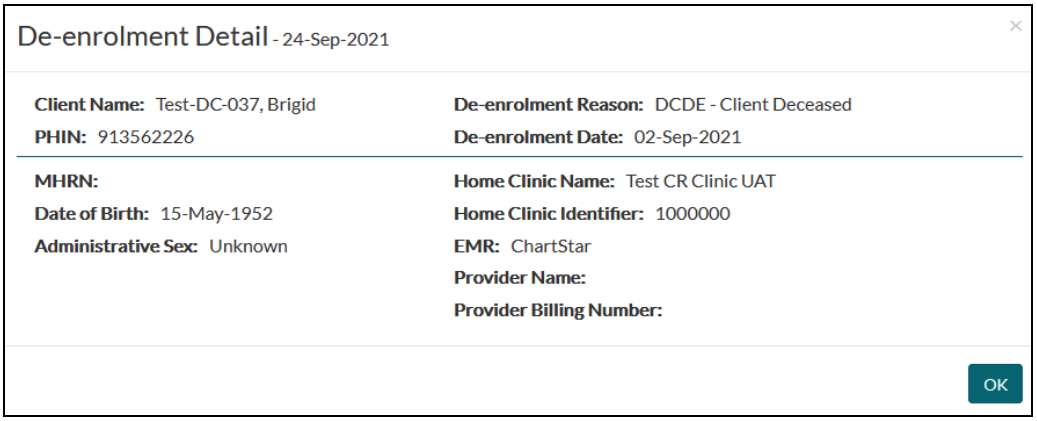
- Type – drop-down menu lists the ***Notice*** type



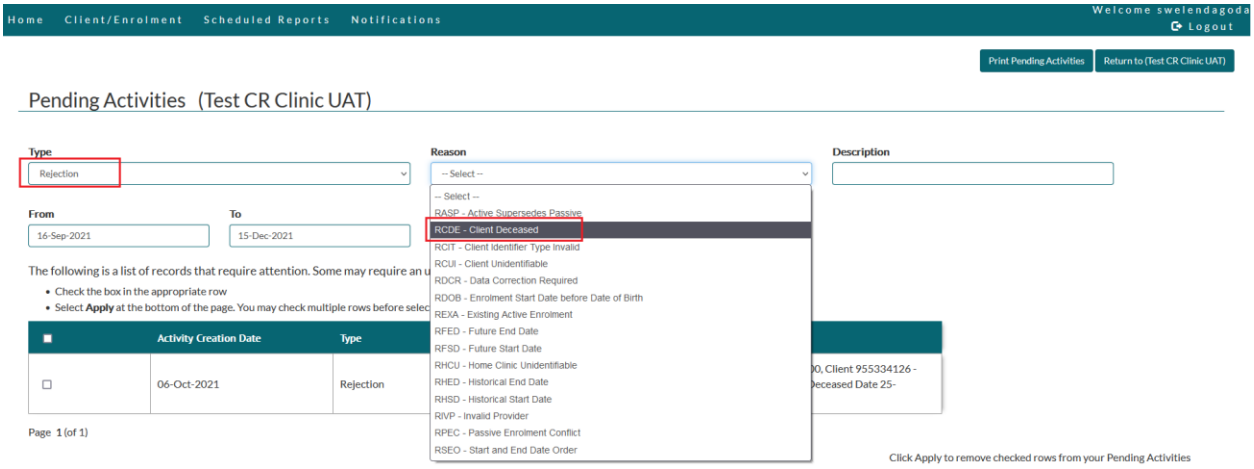
- Reason – drop-down menu lists the new de-enrolment, rejection and notices related to deceased clients.
    - Search for de-enrolment reason ***DCDE – Client Deceased***



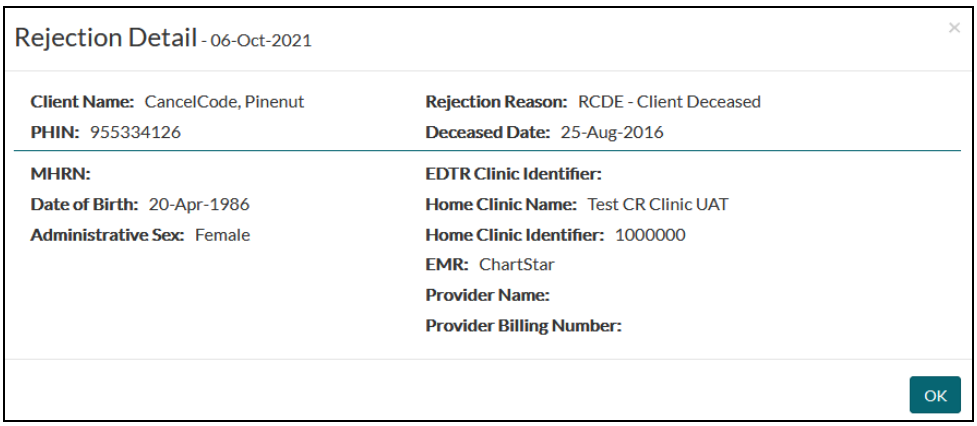
    - De-enrolment Detail screen can be accessed by clicking on one of the results within the searched Pending Activities.



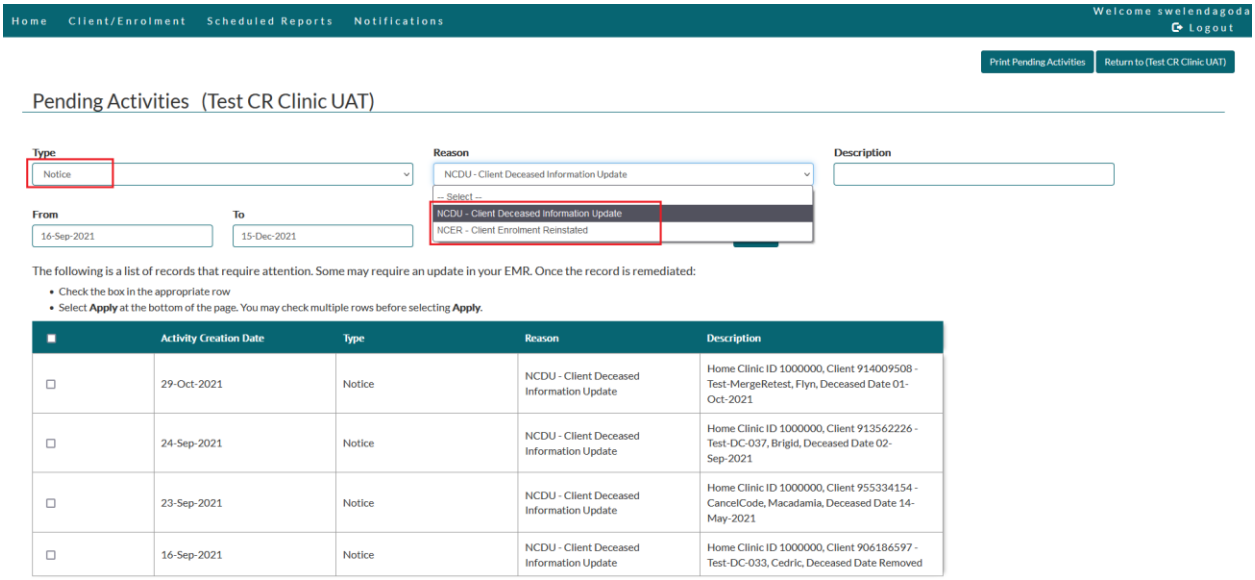
- Search for notice reason ***RCDE – Client Deceased***



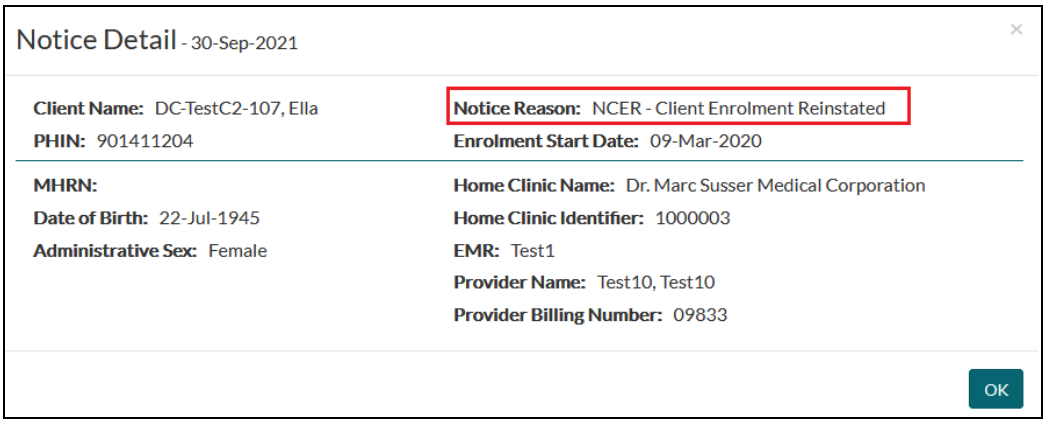
- Rejection Detail screen can be accessed by clicking on one of the results within the searched Pending Activities.

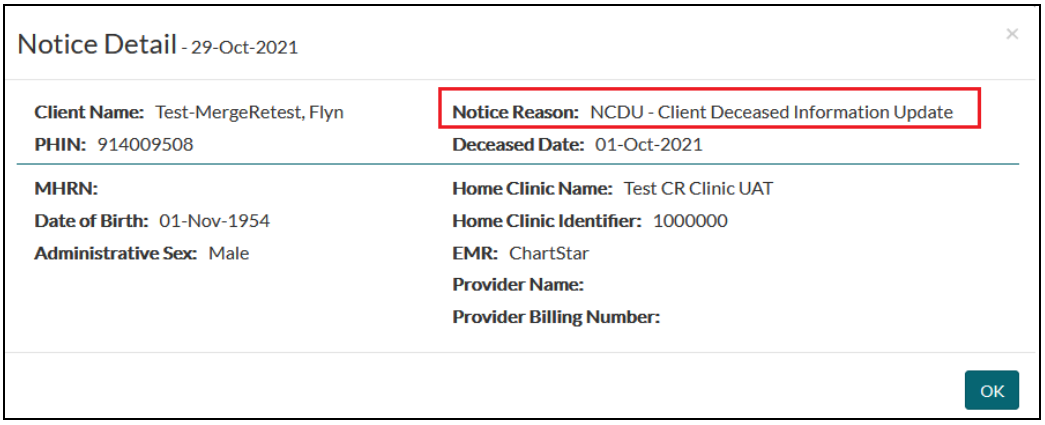


- Search for rejection reason ***NCDU – Client Deceased Information Update*** or ***NCER – Client Enrolment Reinstated***

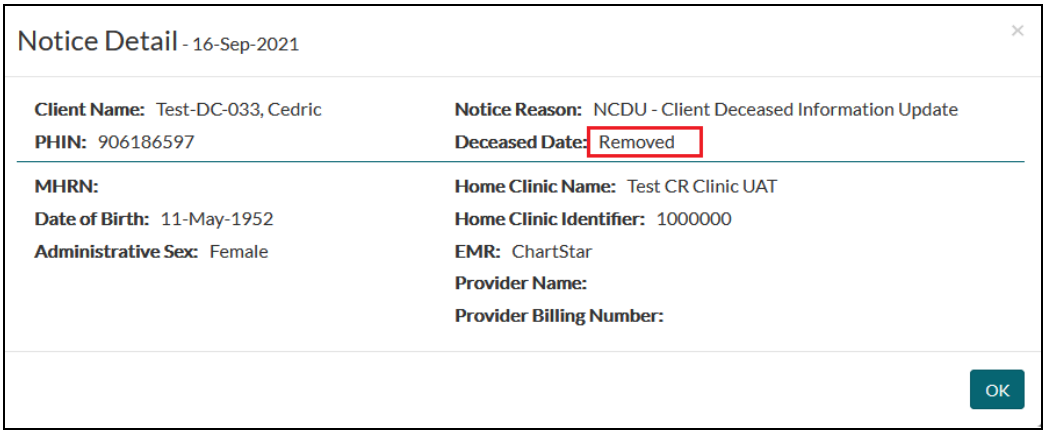


- Notice Detail screens can be accessed by clicking on one of the results within the searched Pending Activities.





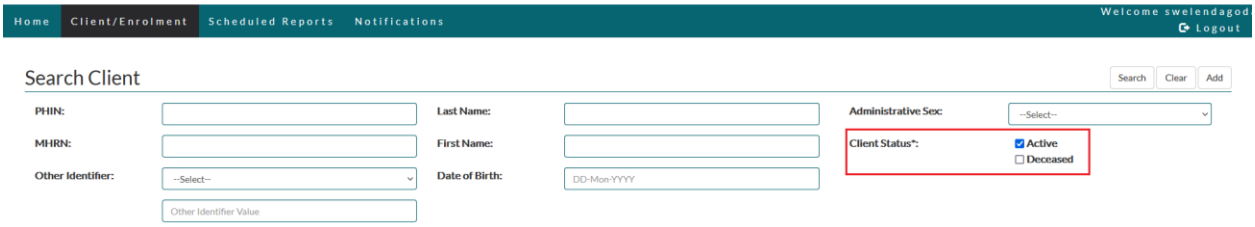
- When the NCDU is generated due to death date removal, the Deceased Date will be shown as ***Removed***



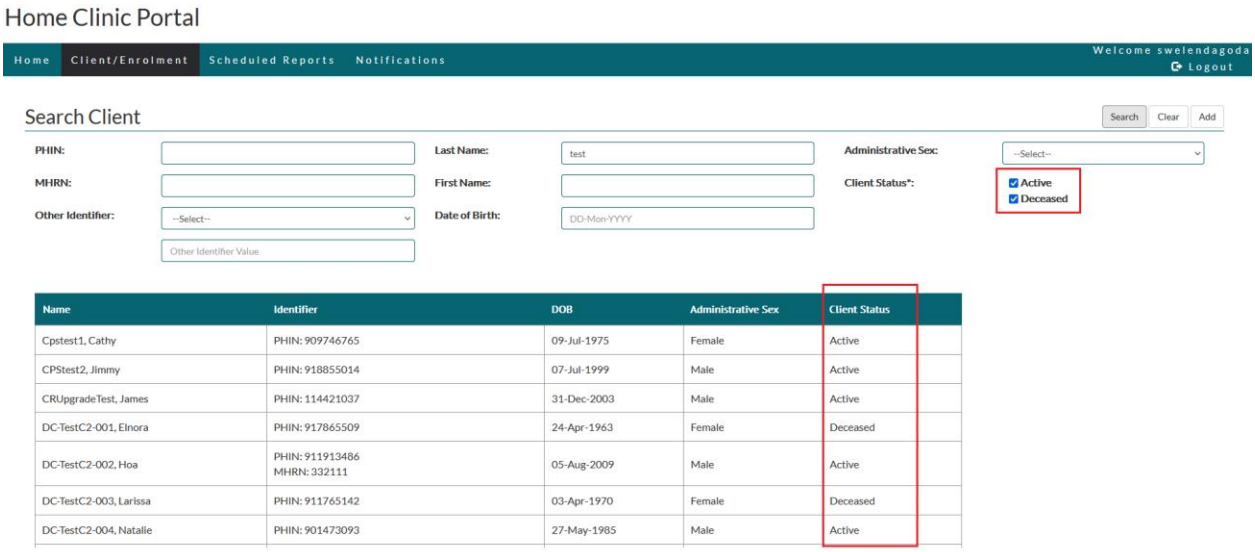
Client Search Screen

- The new search criteria, Client Status check boxes allow searching Active and/or Deceased clients
- By default the Active checkbox is selected

Home Clinic Portal

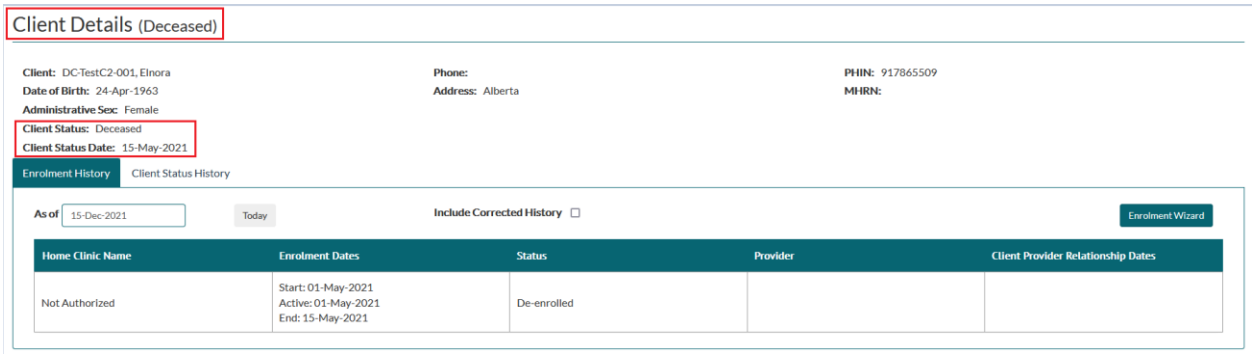


- Under search results table of the Client Search screen, the new Client Status column shows the status of each client searched.



Client Details Screen

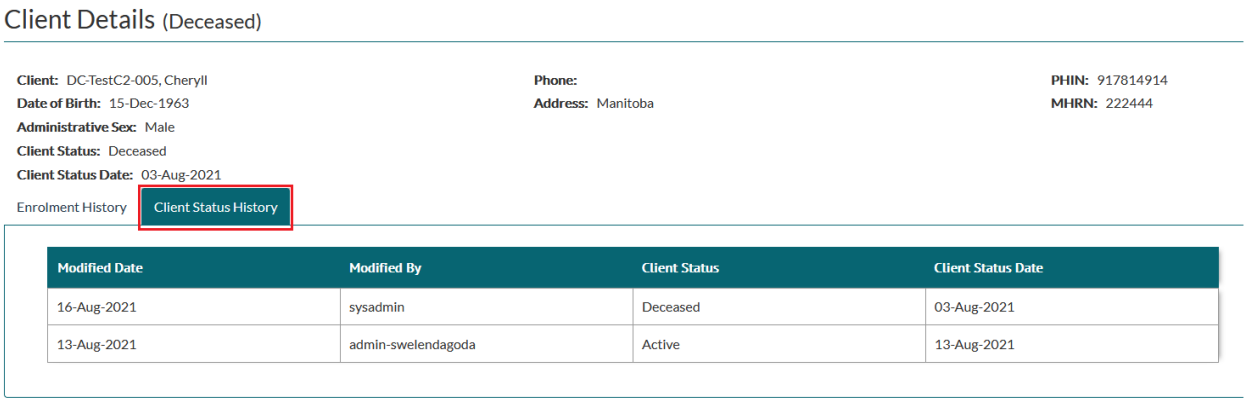
- If the client's status is Deceased, the title shows as ***Client Details (Deceased)***
- New Client Status and Client Status Date fields have been added



NEW Client Status History

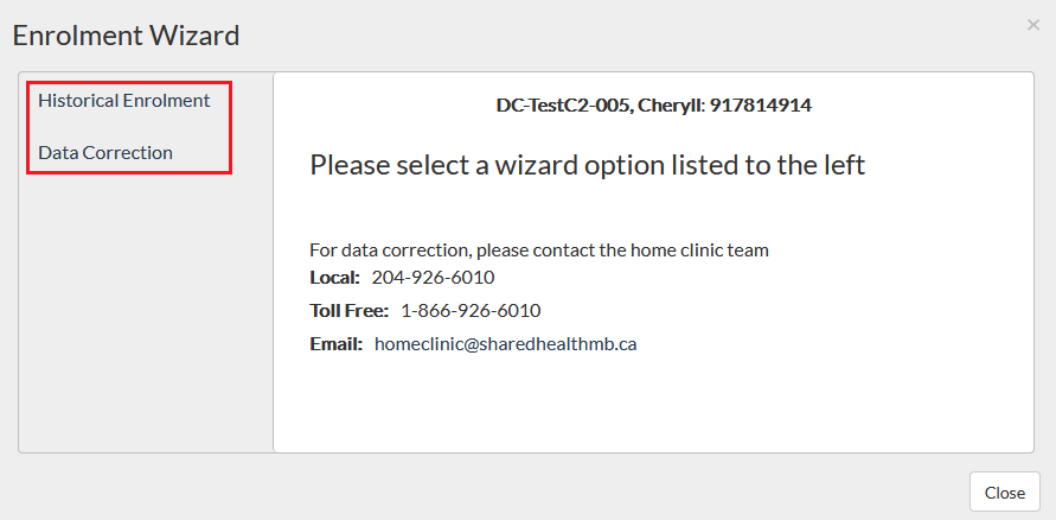
The Client Status History table shows the details of client's status changes for all clients.

Client Status History will provide changes to Client status and the associated date. This history is useful and should be used in situations when there are corrections to Client's Death Date which impacted enrolment.



Enrolment Wizard

Clients in Deceased status only have ***Historical Enrolment*** and ***Data Correction*** options available in the Enrolment Wizard.



Scheduled Reports - Changes to existing reports

There have been changes to the following Scheduled Reports in order for your Home Clinic to view a summary total of de-enrolment of deceased clients or a detailed list by Most Responsible Provider of de-enrolment of deceased clients. Please view our QRG on accessing Scheduled Reports for your Home Clinic https://sharedhealthmb.ca/files/home-clinic-generate-reports.pdf . Below is how the deceased client information appears in the two Scheduled Reports;

1) Client Auto De-enrolment by MRP – Detail

Client Auto De-enrolment by MRP - Detail

Report Parameters: Home Clinic ID:

Report Run Date / Time: 12-Dec-2021 08:57:43 PM

Home Clinic Name	Home Clinic Identifier	Provider Billing ID	Provider Name	Rejection Code / Reason		Identifier(s)	Client Name Last	First	Middle	Date Of Birth	Admin Sex
		None	None	RCDE	Client Deceased	903729530 - JHNMB	Dore	Test-DC-046		1987-Apr-28	F
				RCDE	Client Deceased	906186597 - JHNMB	Test-DC-033	Cedric		1952-May-11	F
				RCDE	Client Deceased	906186597 - JHNMB	Test-DC-033	Cedric		1952-May-11	F
				RCDE	Client Deceased	906186597 - JHNMB	Test-DC-033	Cedric		1952-May-11	F
				RCDE	Client Deceased	911718433 - JHNMB	DC-TestC2-007	Raul		1971-Jan-07	F
				RCDE	Client Deceased	918242582 - JHNMB	DC-TestE2E008	Jane		1953-Aug-05	F

2) Client Auto De-enrolment – Summary

Client Auto De-enrolment - Summary - On Demand

Home Clinic Name	Home Clinic Identifier	Active Supersedes Passive	More Recent Active	Passive Enrolment Conflict	De-enrolment Same Start and End Date	Client Deceased
HC Test 6 for OR	1000069	0	3	0	0	4

For questions and assistance with the Home Clinic Portal or patient enrolment, please contact your *Home Clinic Liaison* **or the Home Clinic team at 204-926-6010/1-866-926-6010 or** homeclinic@sharedhealthmb.ca

14 Appendix A – Client Identifier Types

The following is a list of valid Client Identifier Types:

JHNAB (Alberta)

JHNBC (British Columbia)
JHNMB (Manitoba)
JHNNB (New Brunswick)
JHNNL (Newfoundland and Labrador)
JHNNS (Nova Scotia)
JHNNT (Northwest Territory)
JHNNU (Nunavut Territory)
JHNON (Ontario)
JHNPE (Prince Edward Island)
JHNQC (Quebec)
JHNSK (Saskatchewan)
JHNYT (Yukon Territory)

JHNAF (Armed Forces)
JHNVA (Veterans Affairs)
JHNFN (First Nations)
JHNCO (Correctional Institution)
JHNRC (Royal Canadian Mounted Police)
JHNCI (Immigration)