

Home Clinic Portal

Home Clinic User Guide

Version 2.5
March 2022



Shared health
Soins communs
Manitoba

Table of Contents

Table of Contents	2
1 Introduction	4
1.1 Overview	4
1.2 Getting Started	4
1.3 Available Support	5
2 Log On	5
3 General Tips	6
3.1 Using the Calendar to Populate Date Fields	6
3.2 Using the “As of” Feature	6
4 Home Clinic menu bars	7
4.1 Main Menu Bar	7
4.2 Viewing Home Clinic Header Details	8
4.3 Viewing Home Clinic Tabs	8
4.4 Home Clinic View/Update Screen	8
5 Home Clinic Registration	8
5.1 Complete the Registration Process	9
6 Maintain Home Clinic Details	11
6.1 Update Home Clinic Information	11
6.2 Manage Contacts	12
6.3 Manage Provider Associations/Providers Tab	14
Getting Started	14
Associating a New Provider	14
Ending a Provider Association	16
6.4 View Provider History	17

6.5 Concurrent Users.....	18
6.6 Home Clinic Status Inactive	19
7 Client Records	19
7.1 Clients Tab.....	20
7.2 Search Client	21
7.3 Edit Existing Client Record.....	22
7.4 Add a Client	22
8 Client Enrolment	23
8.1 Add Enrolment	24
8.3 Edit Enrolment Details	26
8.3.1 Edit Enrolment Method.....	26
8.3.2 Change MRP	27
8.3.3 End MRP	28
8.3.4 De-Enrol Client.....	28
8.4 View Client Enrolment Details	29
8.5 'As Of' Enrolment.....	30
8.6 Include Corrected History.....	30
8.7 Historical Enrolment.....	31
9 Submitting the Primary Care Data Extract (PCDE)	33
9.1 Uploading the PCDE.....	34
9.2 Using the PCDE for Ongoing Enrolment	34
10 Notifications	35
10.1 View Notification Details.....	36
11 Remediating Enrolment Records	37
12 Scheduled Reports	40
12.1 View, Print or Export Scheduled Reports	41

12.2 Generating the new COVID-19 Unvaccinated and Unboosted Clients report	43
13 Deceased Clients	44
14 Appendix A – Client Identifier Types	53

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.

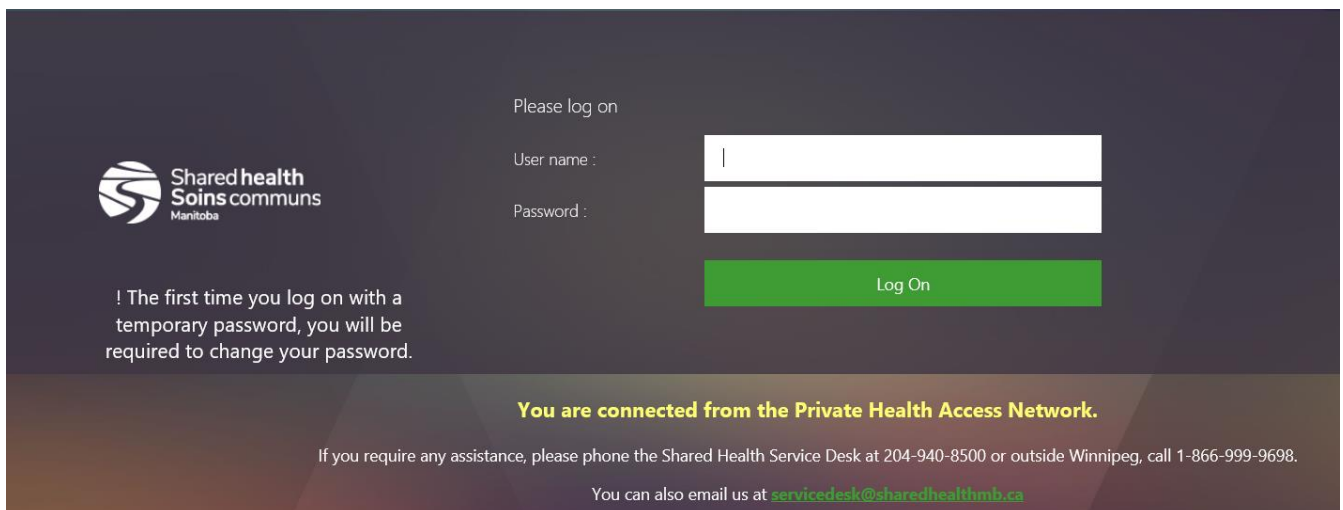
If you encounter any **technical** issues (e.g. difficulty logging in, unable to view a report, etc.) while using the Home Clinic Portal, please contact the Digital Health Service Desk at 204-940-8500, 1-866-999-9698 or servicedesk@sharedhealthmb.ca.

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



The screenshot shows the login interface for the Home Clinic Portal. On the left is the Shared Health Soins communs Manitoba logo. To its right, the text 'Please log on' is displayed. Below this, there are two input fields: 'User name :' and 'Password :'. A green 'Log On' button is positioned below the password field. A message states: '! The first time you log on with a temporary password, you will be required to change your password.' At the bottom, a yellow banner reads 'You are connected from the Private Health Access Network.' Below the banner, contact information for the Shared Health Service Desk is provided, including a phone number and an email address: servicedesk@sharedhealthmb.ca.

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.

Confidentiality Statement

The information you are about to access may constitute personal information, personal health information and/or confidential business information and may be protected by law. You must only access the information you need to carry out your duties and you must not share the information except where you are authorized to do so by applicable law or policy. Your access to the information is logged and may be audited.

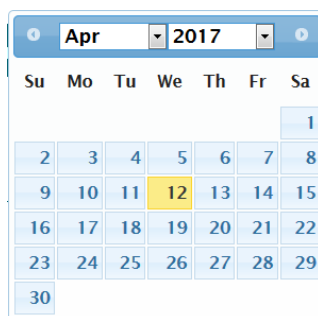
By logging on to this application, you acknowledge having read this Notice and you agree to be bound by it.

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

As of 07-Dec-2018

Today

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.

The Home Clinic Portal menu bar is accessible at all times, providing easy access to your **Home** page, to **Client/Enrolment**, to **Scheduled Reports**, to **Notifications** and to the **Log Out** option.

Any Home Clinic to which you have access will be listed here

Pending Activities will list any Rejections or De-enrolments for your Home Clinic(s)

Handy contact information for the Home Clinic team when business questions arise and the Service Desk for technical assistance.

Only present when important messages need to be shared

Home Clinic Portal

Home Client/Enrolment Scheduled Reports Notifications Welcome train-ac1-02 Logout

My Home Clinic(s)

Pending Activities

Rejections De-enrolments

System Notifications

Looking for Support?

Home Clinic Team
Local: 204-926-6010
Toll Free: 1-866-926-6010
Email: homeclinic@manitoba-ehealth.ca
Website: www.manitoba-ehealth.ca/emr-hclinic.html

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

Confidentiality Statement

The Home Clinic Portal contains information that may constitute personal information, personal health information and/or confidential business information and may be protected by law. Access to and use of the information must be in accordance with applicable laws and/or policies.

Version: 1.1.0-3/9/2010

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

Email:
Phone: Main 123-456-7890

Liaison: train-hcp-01 train-hcp-01
MyHT Associations:

Authorized to send client summaries: Yes

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

Edit Home Clinic

Home Clinic Name: Test Home Clinic A	Initial Registration Date: 22-Nov-2018	Liaison: train-hcp-01 train-hcp-01
Home Clinic Name Type: Legal	Home Clinic Status: Active	MyHT Associations:
Home Clinic Identifier: 1000060	Home Clinic Status Date: 16-Apr-2019	Authorized to send client summaries: Yes
EDTR Clinic Identifier: 9996	Email	
EMR		
Test1	Main	4
EMR ID	123-456-7890	
Shared EMR	Mobile	
--Select--	204-xxx-xxxx	
EMR Implementation Date	Fax	
DD-Mon-YYYY	204-xxx-xxxx	
3 Accept HC Criteria: Yes		
Address	Contact	Providers
5	6	7

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 save 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.

Search Providers: 8

	Name	Billing Number
9 <input type="button" value="Add"/>	Provider2, Test2	11111
<input type="button" value="Add"/>	Provider3, Test3	22222
<input type="button" value="Add"/>	Provider4, Test4	33333

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.*

Name	Billing Number	Provider Type
Provider2, Test2	11111	--- Select ▾

10

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**.

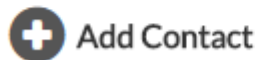
Address Contact Providers

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.

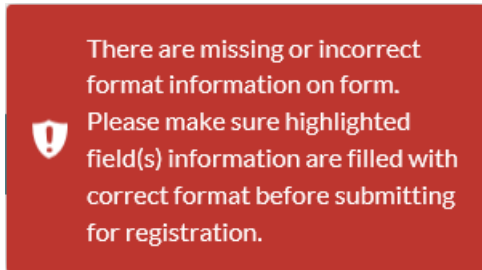
Address Contact Providers



- 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)

Primary Contact *	
First Name	Work
<input type="text" value="Primary"/>	<input type="text" value="204-745-1201"/>
Last Name	Mobile
<input type="text" value="Contact"/>	<input type="text" value="204-xxx-xxxx"/>
Email	Fax
<input type="text"/>	<input type="text" value="204-xxx-xxxx"/>

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




Address **Contact** Providers

+ Add Contact

Primary Contact *

<p>First Name</p> <input type="text"/> <p>Field is empty.</p>	<p>Work</p> <input type="text" value="204-xxx-xxxx (Ext. xxx)"/> <p>Enter contact work phone</p>
<p>Last Name</p> <input type="text"/> <p>Field is empty.</p>	<p>Mobile</p> <input type="text" value="204-xxx-xxxx"/>
<p>Email</p> <input type="text"/>	<p>Fax</p> <input type="text" value="204-xxx-xxxx"/>

- 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.

<p>Contact Type</p> <input type="text" value="Clinician"/>	<p>Work</p> <input type="text" value="204-xxx-xxxx (Ext. xxx)"/>	
<p>First Name</p> <input type="text"/>	<p>Mobile</p> <input type="text" value="204-xxx-xxxx"/>	
<p>Last Name</p> <input type="text"/>	<p>Fax</p> <input type="text" value="204-xxx-xxxx"/>	

- 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.

Search Providers: 3

Name		Billing Number
4	<input type="button" value="Add"/> JOHNSON, ROBERT G	
	<input type="button" value="Add"/> JOHNSON, I
	<input type="button" value="Add"/> JOHNSON, L

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.



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.

End Provider Association ×

Please complete the following fields.

Name *

JOHNSON,

Start Date *

22-Nov-2016

End Date *

23-Nov-2016

End Reason

--Select-- ▼

Save

Cancel

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.

Providers Check the Show inactive Provider checkbox to view all providers, including those no longer associated with the Home Clinic

☒ Show Inactive Provider

Name	Billing Number	Provider Type	Start Date	End Date	End Reason
ProviderX, TestX	12345	General Practitioner	01-Jan-2018		

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.

Provider History ×

Name:

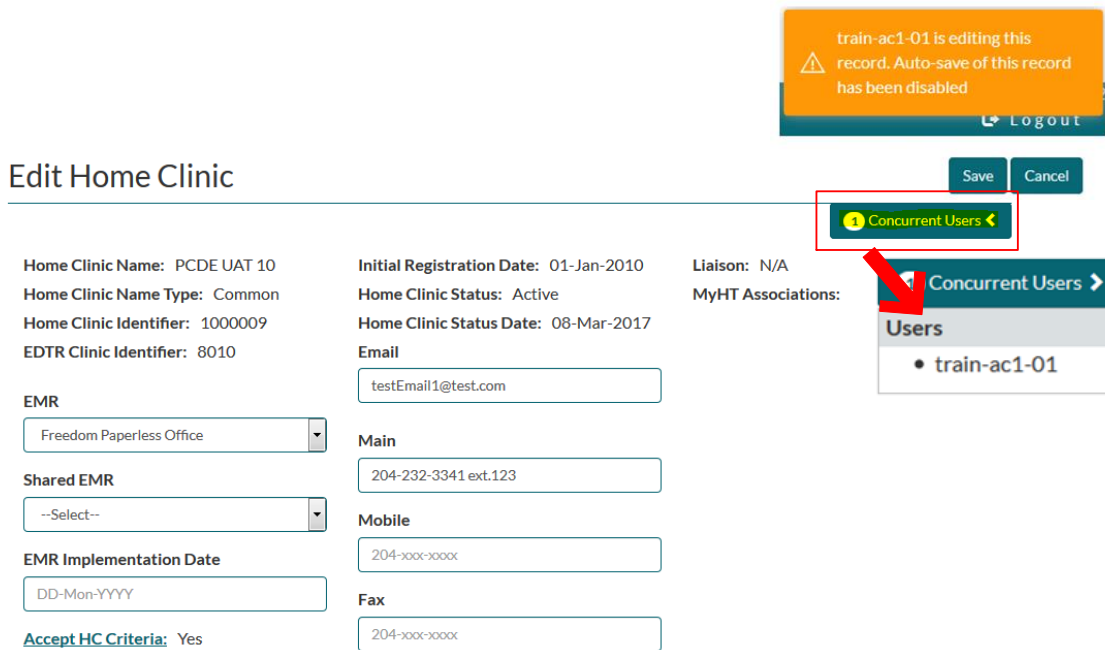
Billing Number:

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	

Close

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.



train-ac1-01 is editing this record. Auto-save of this record has been disabled [Logout]

Edit Home Clinic [Save] [Cancel]

1 Concurrent Users [arrow]

Concurrent Users [arrow]

Users

- train-ac1-01

Home Clinic Name: PCDE UAT 10
Home Clinic Name Type: Common
Home Clinic Identifier: 1000009
EDTR Clinic Identifier: 8010

Initial Registration Date: 01-Jan-2010
Home Clinic Status: Active
Home Clinic Status Date: 08-Mar-2017

Liaison: N/A
MyHT Associations:

Email: testEmail1@test.com

EMR: Freedom Paperless Office

Shared EMR: --Select--

EMR Implementation Date: DD-Mon-YYYY

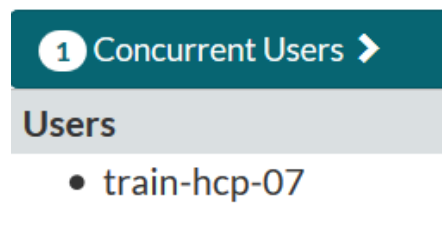
Accept HC Criteria: Yes

Main: 204-232-3341 ext.123

Mobile: 204-xxx-xxxx

Fax: 204-xxx-xxxx

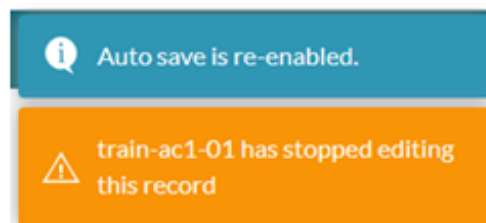
1. To view the list of User IDs currently editing the Home Clinic details, click on the arrow beside the number of concurrent users.



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

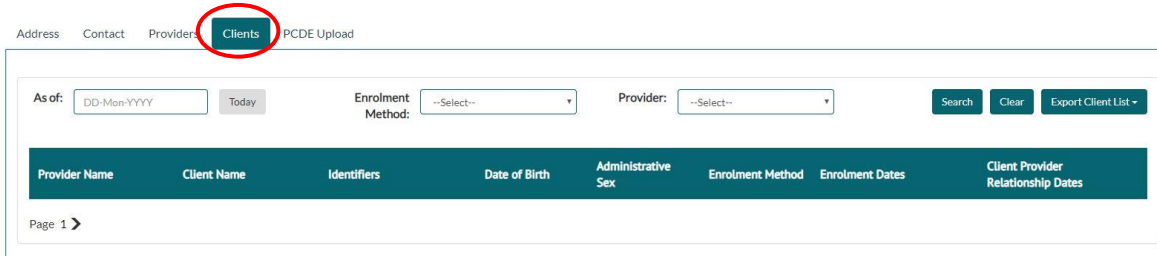
Enrolment of a client (i.e. patient) to a Home Clinic formalizes the relationship of that client to their primary care home base. Clients are subsequently associated to a health-care provider within the Home Clinic, as their Most Responsible Provider. As you can see, the client is at the

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.



Address Contact Provider **Clients** PCDE Upload

As of: DD-Mon-YYYY Today Enrolment Method: --Select-- Provider: --Select-- Search Clear Export Client List +

Provider Name	Client Name	Identifiers	Date of Birth	Administrative Sex	Enrolment Method	Enrolment Dates	Client Provider Relationship Dates
---------------	-------------	-------------	---------------	--------------------	------------------	-----------------	------------------------------------

Page 1 >

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.

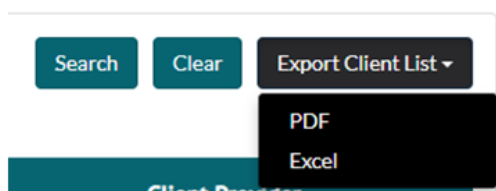
Address Contact Providers **Clients** PCDE Upload

As of: 03-Dec-2018 Today Enrolment Method: --Select-- Provider: --Select-- Search Clear Export Client List +

Provider Name	Client Name	Identifiers	Date of Birth	Administrative Sex	Enrolment Method	Enrolment Dates	Client Provider Relationship Dates
Provider1, Test	Test, Patient2	PHIN: 300432158	28-Dec-1978	Female	Active	Start: 01-Feb-2010 Active: 01-Feb-2018	Start: 01-Feb-2010
Provider2, Test	Test, Patient1	PHIN: 338541609	15-May-1931	Male	Active	Start: 01-Jan-2010 Active: 01-Jan-2018	Start: 01-Jan-2018

Page 1 (of 1)

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.

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

Search Client

PHIN:	<input type="text"/>	Last Name:	<input type="text"/>	Administrative Sex:	<input type="text"/>
MHRN:	<input type="text"/>	First Name:	<input type="text"/>		
Other Identifier:	--Select--	Date of Birth:	<input type="text" value="DD-Mon-YYYY"/>		
	<input type="text" value="Other Identifier Value"/>				

! 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.

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.
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.

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

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 Save Cancel

Edit Client

<p>First Name *</p> <input type="text" value="test"/>	<p>PHIN</p> <input type="text"/>
<p>Last Name *</p> <input type="text" value="test"/>	<p>MHRN</p> <input type="text"/>
<p>Middle Name</p> <input type="text"/>	<p>Other Identifier(s)</p> <div> <input type="text" value="Other Identifier Value"/> <input type="button" value="X"/> <input type="button" value="+"/> </div>
<p>Date of Birth *</p> <input type="text" value="01-Jan-2000"/>	<p>AB Personal Health Number: 123456789 ✖</p>
<p>Administrative Sex *</p> <input type="text" value="Male"/>	

Contact

<p>Street Line 1</p> <input type="text" value="100 main street"/>	<p>Province *</p> <input type="text" value="Manitoba"/>
<p>Street Line 2</p> <input type="text"/>	<p>Postal Code</p> <input type="text" value="r5t 6y7"/>
<p>City</p> <input type="text" value="winnipeg"/>	<p>Phone</p> <input type="text" value="204-111-1111"/>

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.

Search Client Search Clear Add

<p>PHIN:</p> <input type="text"/>	<p>Last Name:</p> <input type="text"/>	<p>Administrative Sex:</p> <input type="text" value="--Select--"/>
<p>MHRN:</p> <input type="text"/>	<p>First Name:</p> <input type="text"/>	
<p>Other Identifier:</p> <input type="text" value="--Select--"/>	<p>Date of Birth:</p> <input type="text" value="DD-Mon-YYYY"/>	
<p>Other Identifier Value</p> <input type="text"/>		

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

Save

Cancel

Add Client

First Name *

Last Name *

Middle Name

Date of Birth *

Administrative Sex *

PHIN

MHRN

Other Identifier(s)

Other Identifier Value



2

Contact

Street Line 1

Street Line 2

City

Province *

Postal Code

Phone

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).

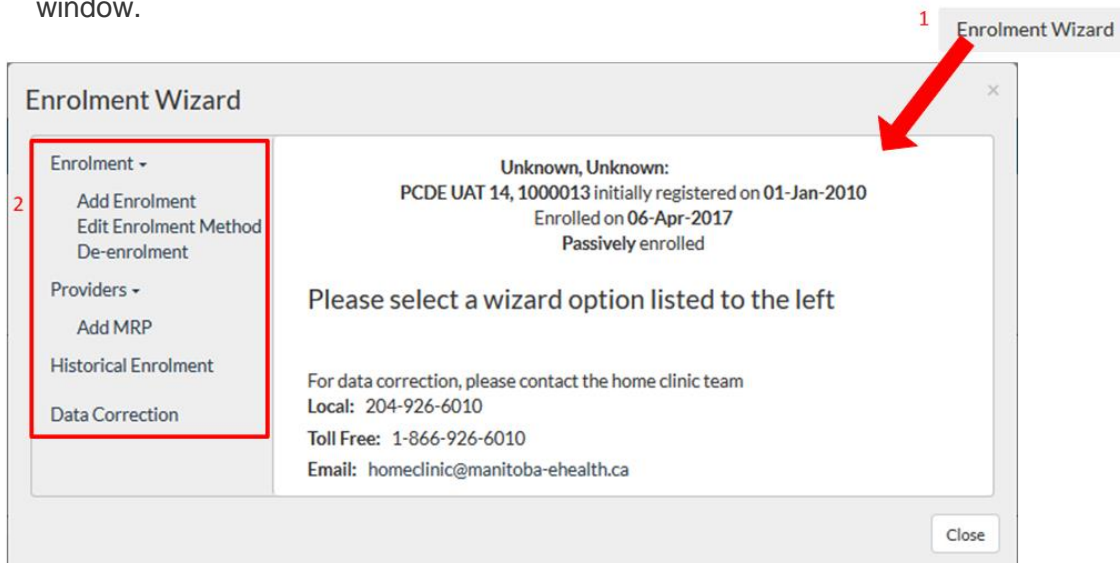
8 Client Enrolment

8.1 Add Enrolment

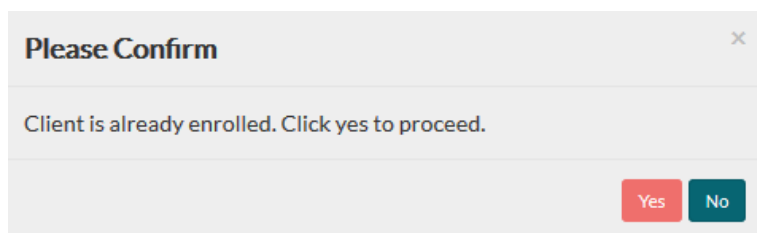
! The list of options in the Enrolment Wizard menu will change dynamically based on the conditions associated with the client currently being viewed. For example, if the client is not yet enrolled, De-enrolment will not be an option.

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.

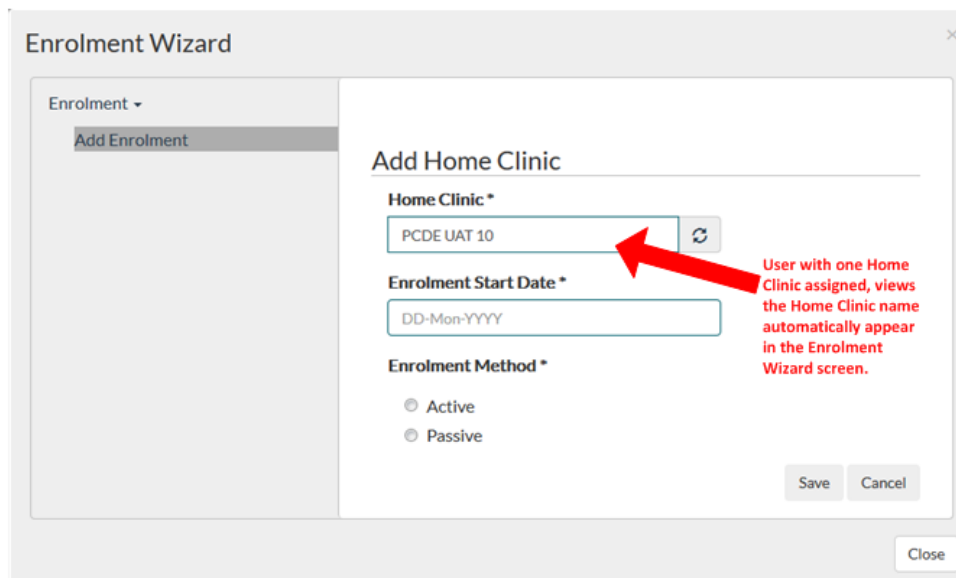


If the client is already enrolled at any Home Clinic, a message will display. To continue enrolling them to your Home Clinic, simply click **Yes**.



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.



Enrolment Wizard

Enrolment ▾
Add Enrolment

Add Home Clinic

Home Clinic *
PCDE UAT 10

Enrolment Start Date *
DD-Mon-YYYY

Enrolment Method *
☐ Active
☐ Passive

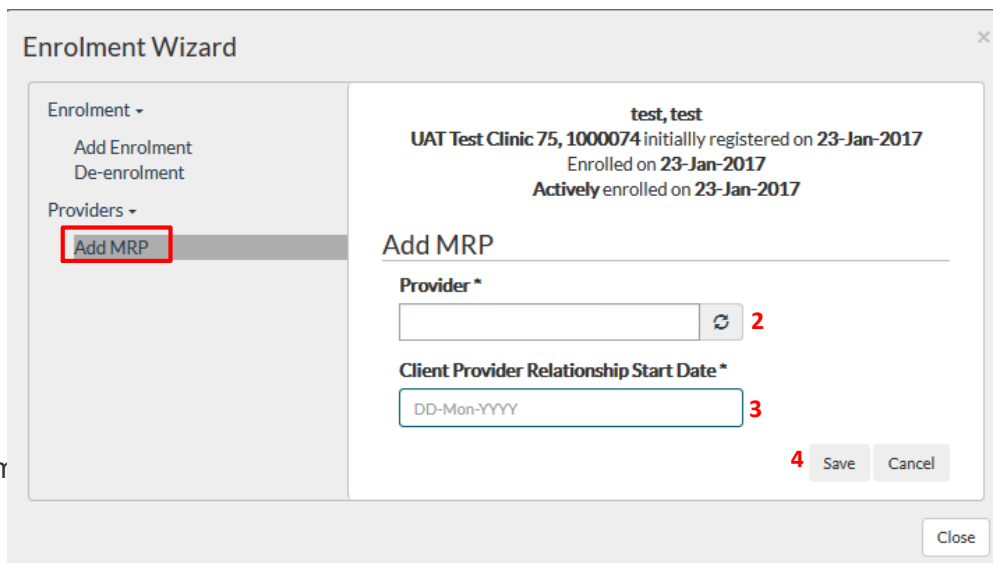
Save Cancel

Close

User with one Home Clinic assigned, views the Home Clinic name automatically appear in the Enrolment Wizard screen.

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.



Enrolment Wizard

Enrolment ▾
Add Enrolment
De-enrolment

Providers ▾
Add MRP

test, test
UAT Test Clinic 75, 1000074 initially registered on 23-Jan-2017
 Enrolled on 23-Jan-2017
 Actively enrolled on 23-Jan-2017

Add MRP

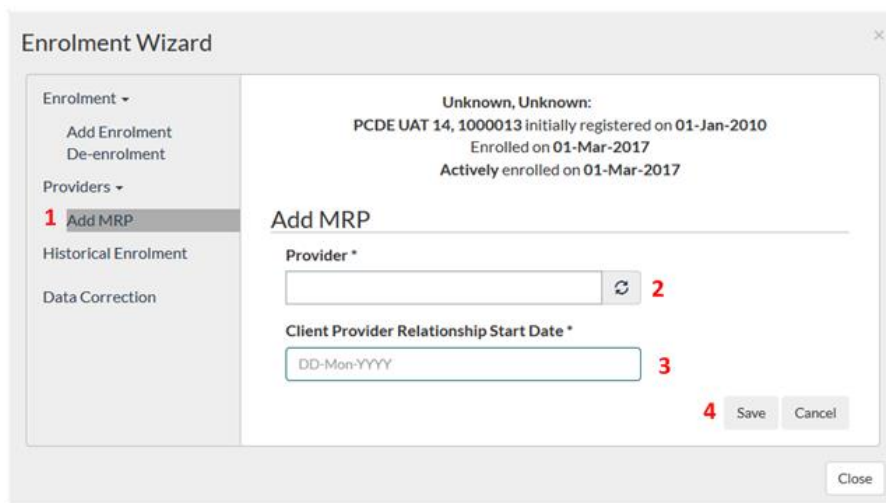
Provider *
2

Client Provider Relationship Start Date *
3
DD-Mon-YYYY

4 Save Cancel

Close

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**.

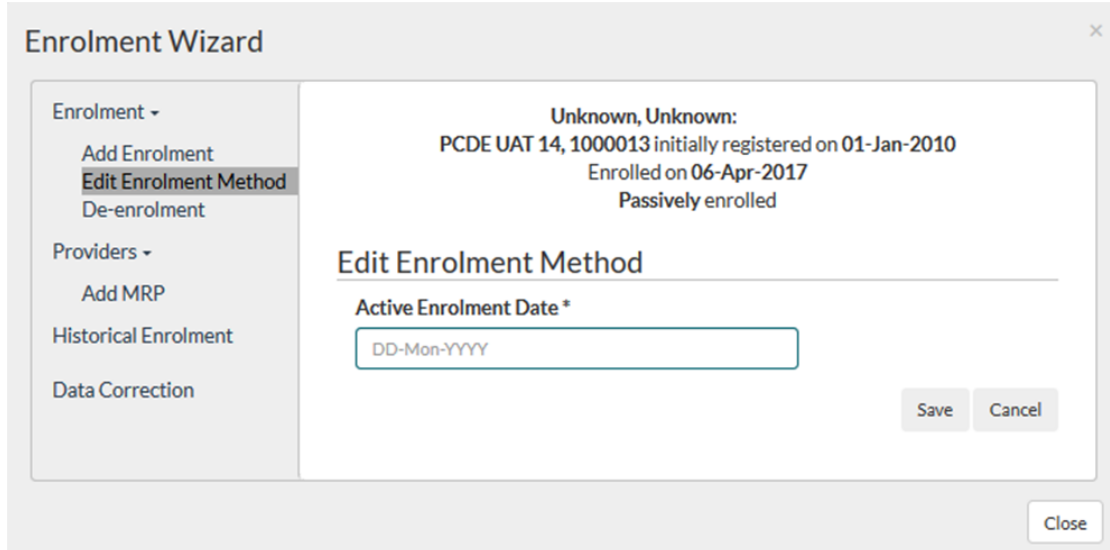
8.3 Edit Enrolment Details

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.



- 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

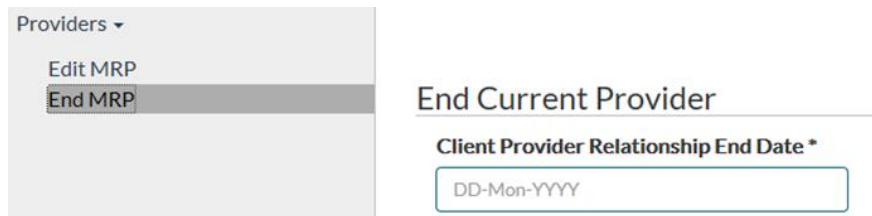
- Select the **Edit MRP** option from the Enrolment Wizard menu. Adding a new MRP will automatically end the relationship between the client and the existing MRP (the start date of the new Client Provider relationship less one day will be used as the end date for the prior relationship).
- Select the **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.
- 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.

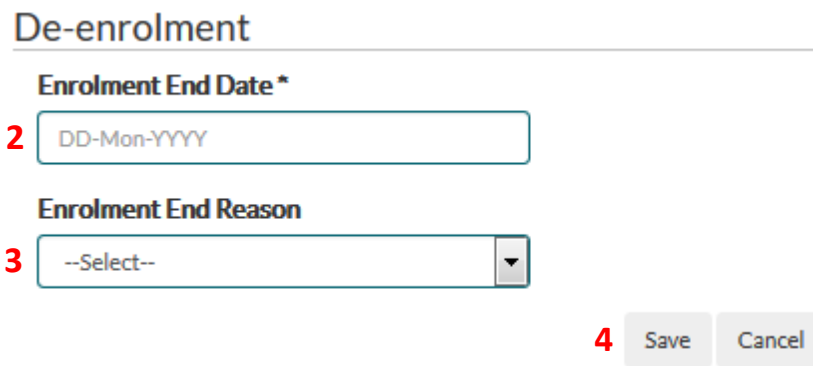


The screenshot shows a dropdown menu titled 'Providers' with three options: 'Edit MRP', 'End MRP' (which is highlighted), and an empty option. To the right of the menu is a form titled 'End Current Provider'. It contains a label 'Client Provider Relationship End Date *' and a text input field with the placeholder 'DD-Mon-YYYY'.

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.



The screenshot shows a form titled 'De-enrolment'. It has two main sections. The first section is 'Enrolment End Date *' with a text input field containing the placeholder 'DD-Mon-YYYY'. A red number '2' is to the left of this field. The second section is 'Enrolment End Reason' with a dropdown menu showing '--Select--'. A red number '3' is to the left of this dropdown. At the bottom right, there are two buttons: 'Save' and 'Cancel'. A red number '4' is to the left of the 'Save' button.

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.

Client Details

Client: Test Patient1
Date of Birth: 15-May-1931
Administrative Sex: Male

Phone:
Address: Manitoba

PHIN: 338541609
MHRN:

Enrolment History

As of	07-Dec-2018	Today	Include Corrected History <input type="checkbox"/>	Enrolment Wizard
Home Clinic Name	Enrolment Dates	Status	Provider	Client Provider Relationship Dates
Test Home Clinic A	Start: 01-Jan-2010 Active: 01-Jan-2018	In Effect	MRP: Provider2, Test	Start: 01-Jan-2018

! 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.

PCDE UAT 1

☐ Include Corrected

Detail Creation Date	Enrolment Dates	Enrolment Method	Enrolment Status	Enrolment End Reason	Provider	Client Provider Relationship Dates
13-Mar-2017 09:05	Start: 01-Mar-2017	Passive	In Effect			

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.

- 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.

- 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.
- 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.

Client Details as of 01-Dec-2018

Client: Test, Patient2	Phone:	PHIN: 300432158
Date of Birth: 28-Dec-1978	Address: Manitoba	MHRN:
Administrative Sex: Female		
Client Status: Active		

Enrolment History

As of: Today ☐ Include Corrected History ☐ Enrolment Wizard

Home Clinic Name	Enrolment Dates	Status	Provider	Client Provider Relationship Dates
Test Home Clinic A	Start: 01-Feb-2010 Active: 01-Feb-2018	In Effect	MRP: Provider1, Test	Start: 01-Feb-2010

- 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.
- 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.

Client Details

Client: Test, Patient1	Phone:	PHIN: 338541609
Date of Birth: 15-May-1931	Address: Manitoba	MHRN:
Administrative Sex: Male		

Enrolment History

As of: 07-Dec-2018 Today **Include Corrected History** ☐ Enrolment Wizard

Home Clinic Name	Enrolment Dates	Status	Provider	Client Provider Relationship Dates
Test Home Clinic A	Start: 01-Jan-2010 Active: 01-Jan-2018	In Effect	MRP: Provider2, Test	Start: 01-Jan-2018

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.

Enrolment Wizard

Enrolment ▾
Add Enrolment
De-enrolment

Providers ▾
Add MRP

1 Historical Enrolment

Data Correction

Unknown, Unknown:

Historical Enrolment

Home Clinic *

2 PCDE UAT 14

Enrolment Start Date *

3 01-Mar-2017

Enrolment Method * ☒ Active ☐ Passive

5 Do you want to add an MRP? * ☒ Yes ☐ No

Provider *

6 Client Provider Relationship Start Date *

01-Mar-2017

Do you want to end the MRP relationship? * ☐ Yes ☒ No

Do you want to end this enrolment? * ☐ Yes ☒ No

Save Cancel

Close

- 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**.

7 Do you want to end the MRP relationship? * ☒ Yes ☐ No

Client Provider Relationship End Date *

DD-Mon-YYYY

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

8 Do you want to end this enrolment? * ☒ Yes ☐ No

Enrolment End Date *

DD-Mon-YYYY

Enrolment End Reason

--Select--

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

**** There are unprocessed transactions for this client which could affect the enrolment information displayed above. Enrolment and MRP information can be updated, however it is recommended to wait until tomorrow when all transactions have been processed. ****

Please select a wizard option listed to the left

For data correction, please contact the home clinic team

Local: 204-926-6010

Toll Free: 1-866-926-6010

Email: homeclinic@sharedhealthmb.ca

9 Submitting the Primary Care Data Extract (PCDE)

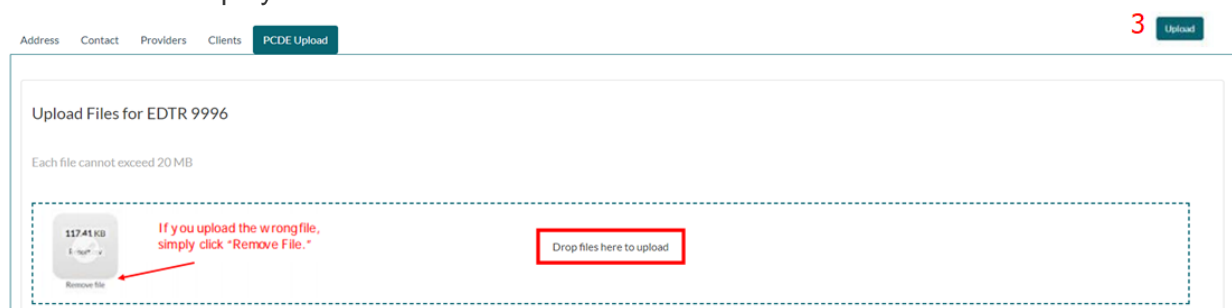
The PCDE extracts data from discrete data fields in the EMR to support submission of patient demographic, prevention and chronic disease information related to the Manitoba Primary Care Quality Indicators (PCQIs). Eligible Home Clinics use the Home Clinic Portal to upload and submit their PCDE.

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.

Address Contact Providers Clients **PCDE Upload**

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.

Processed Extract

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.

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.

Notifications for train-hcp-03, train-hcp-03 3 Search Clear

2 Home Clinic: Subject:

From: To:

Notification Date	Subject	Home Clinic
23-Oct-2017 11:00	Enrolment rejections and/or de-enrolments available for remediation	PCDE UAT 14
20-Oct-2017 17:00	Enrolment rejections and/or de-enrolments available for remediation	PCDE UAT 14
20-Oct-2017 14:00	Enrolment rejections and/or de-enrolments available for remediation	PCDE UAT 14
20-Oct-2017 13:00	Enrolment rejections available for remediation	PCDE UAT 14
20-Oct-2017 13:00	Same Start and End Date De-enrolment	PCDE UAT 14
20-Oct-2017 12:00	Enrolment rejections available for remediation	PCDE UAT 14

4

Notification Date: 23-Oct-2017 11:00

Subject: Enrolment rejections and/or de-enrolments available for remediation

[Details - PDF](#) [Details - EXCEL](#)

Body: Information received from other Home Clinics resulted in rejections and/or de-enrolments that require your attention. Please log into the Home Clinic Portal at your earliest opportunity to review.

Notification ID: 877453

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.

Notifications for Home Clinic Portal User's Name

Home Clinic: Subject:

From: To:

Notification Date	Subject	Home Clinic
23-Oct-2017 11:00	Enrolment rejections and/or de-enrolments available for remediation	PCDE UAT 14
20-Oct-2017 17:00	Enrolment rejections and/or de-enrolments available for remediation	PCDE UAT 14
20-Oct-2017 14:00	Enrolment rejections and/or de-enrolments available for remediation	PCDE UAT 14
20-Oct-2017 13:00	Enrolment rejections available for remediation	PCDE UAT 14
20-Oct-2017 13:00	Same Start and End Date De-enrolment	PCDE UAT 14
20-Oct-2017	Enrolment rejections available for	PCDE UAT 14

De-enrolment information available for client

Enrolment rejections and/or de-enrolments available for remediation

Enrolment rejections available for remediation

Enrolment rejections available for remediation

Enrolment rejections available for remediation

Home Clinic Name Change

Home Clinic Registration Escalation

Home Clinic Registration Received

Home Clinic Registration Successfully Completed

Home Clinic Registration Withdrawal

Inactive Home Clinic

Last MRP Disassociated

MRP Associated

MRP Disassociated

Primary Contact Update

Same Start and End Date De-enrolment

Same Start and End Date De-enrolment

- Click the **Search** button.
- 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**.
- 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.

- Access information related to enrolment rejections and automatic de-enrolments by either:
 - 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 criteria 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.
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.

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

Print Pending Activities

Pending Activities (PCDE UAT 14)

2

Type: Rejection Reason: -- Select -- Description:

From: 22-Jul-2017 To: 20-Oct-2017

3 Show Checked Row(s) ☐ 4 Search

Check the "Show Checked Row(s)" box to display all rows that have been marked corrected

The following is a list of records that require attention. Some may require an update in your EMR. Once the record is remediated:

- Check the box in the appropriate row
- Select **Apply** at the bottom of the page. You may check multiple rows before selecting **Apply**.

Check the blank checkbox in the header to select all rows, or select each row to mark corrected

	Activity Creation Date	Type	Reason	Description
<input type="checkbox"/>	20-Oct-2017	Rejection	RASP - Active Supersedes Passive	EDTR Clinic ID 8014, Billing Number N/A, Client ID
<input type="checkbox"/>	20-Oct-2017	Rejection	RASP - Active Supersedes Passive	EDTR Clinic ID 8014, Billing Number N/A, Client ID
<input type="checkbox"/>	20-Oct-2017	Rejection	RASP - Active Supersedes Passive	EDTR Clinic ID 8014, Billing Number N/A, Client ID
<input type="checkbox"/>	20-Oct-2017	Rejection	RASP - Active Supersedes Passive	EDTR Clinic ID 8014, Billing Number N/A, Client ID

7

Page 1 (of 9) >

Click Apply to remove checked rows from your Pending Activities

8 Apply

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.

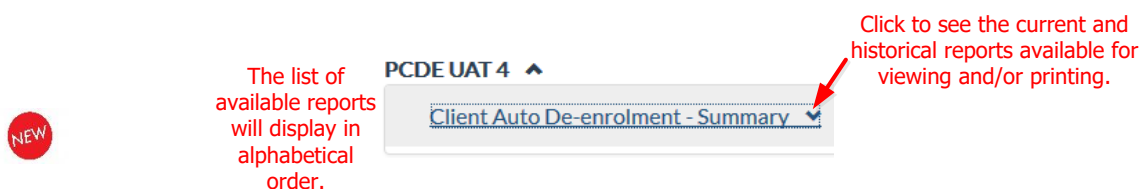
Available in Excel or PDF format, the Scheduled Reports are run either weekly or monthly (depending on the report) and retained in the Home Clinic Portal for 6 months. Beyond that, clinics can request historical information from the Home Clinic Team.

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.

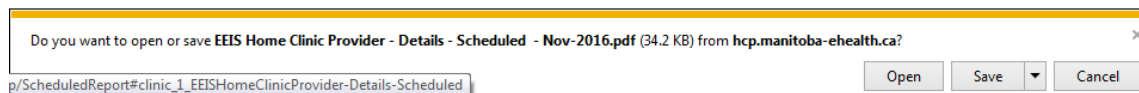


2. Click the down arrow next to the report name to see a list of the current and historical reports by report run date.

Click to collapse the list.

Client Auto De-enrolment - Summary		
24-Apr-2017	PDF	EXCEL
19-Apr-2017	PDF	EXCEL
18-Apr-2017	PDF	EXCEL
13-Apr-2017	PDF	EXCEL

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.

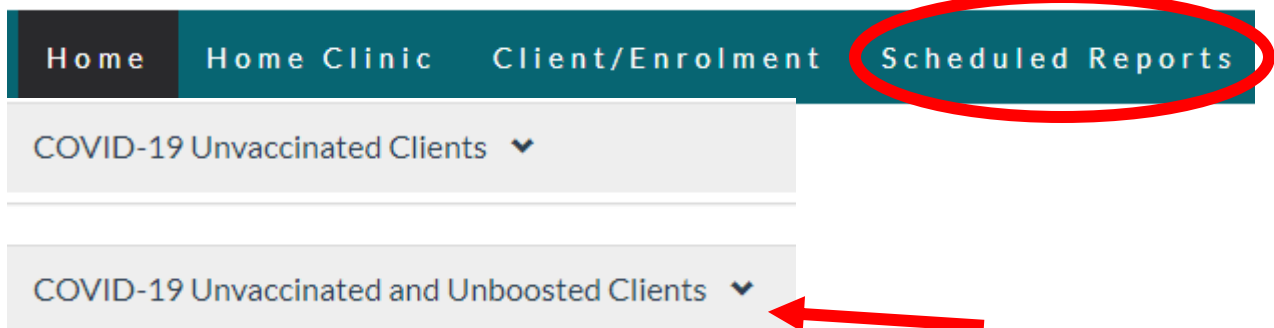
If viewing in PDF, use the standard PDF toolbar to view (zoom in/out, next page, etc.) and print the report.



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 with the addition of those age 18+ who have NOT received a third dose/booster 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.



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.

Home Clinic Portal

Home	Client/Enrolment	Scheduled Reports	Notifications
My Home Clinic(s)		Pending Activities	
		Rejections	De-enrolments
		35	25
			41
System Notifications		Looking for Support?	
		<p>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/</p>	
		<p>Service Desk Local: 204-940-8500 Toll Free: 1-866-999-9698 Email: servicedesk@sharedhealthmb.ca</p>	

Pending Activities Screen

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

Home Client/Enrolment Scheduled Reports Notifications Welcome swelendago Logout

Print Pending Activities Return to (Test CR Clinic UAT)

Pending Activities (Test CR Clinic UAT)

Type: De-enrolment --Select-- De-enrolment **Notice** Rejection

Reason: --Select--

Description:

Show Checked Row(s) ☐ Search

The following is a list of records that require attention. Some may require an update in your EMR. Once the record is remediated:

- Check the box in the appropriate row
- Select **Apply** at the bottom of the page. You may check multiple rows before selecting **Apply**.

	Activity Creation Date	Type	Reason	Description
<input type="checkbox"/>	29-Oct-2021	De-enrolment	DCDE - Client Deceased	Home Clinic ID 1000000, Billing Number N/A, Client 914009508 - Test-MergeRetest, Flynn, De-enrolled/Deceased Date 01-Oct-2021
<input type="checkbox"/>	24-Sep-2021	De-enrolment	DCDE - Client Deceased	Home Clinic ID 1000000, Billing Number N/A, Client 913562226 - Test-DC-037, Brigid, De-enrolled/Deceased Date 02-Sep-2021

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

Home Client/Enrolment Scheduled Reports Notifications Welcome swelendago Logout

Print Pending Activities Return to (Test CR Clinic UAT)

Pending Activities (Test CR Clinic UAT)

Type: De-enrolment

Reason: --Select-- --Select-- DASP - Active Supersedes Passive **DCDE - Client Deceased** DMR - More Recent Active DPEC - Passive Enrolment Conflict DSSE - Same Start and End Date

From: 16-Sep-2021 To: 15-Dec-2021

Description:

The following is a list of records that require attention. Some may require an update in your EMR. Once the record is remediated:

- Check the box in the appropriate row
- Select **Apply** at the bottom of the page. You may check multiple rows before selecting **Apply**.

	Activity Creation Date	Type	Reason	Description
<input type="checkbox"/>	29-Oct-2021	De-enrolment	DCDE - Client Deceased	Home Clinic ID 1000000, Billing Number N/A, Client 914009508 - Test-MergeRetest, Flynn, De-enrolled/Deceased Date 01-Oct-2021
<input type="checkbox"/>	24-Sep-2021	De-enrolment	DCDE - Client Deceased	Home Clinic ID 1000000, Billing Number N/A, Client 913562226 - Test-DC-037, Brigid, De-enrolled/Deceased Date 02-Sep-2021

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

De-enrolment Detail - 24-Sep-2021 ✕

Client Name: Test-DC-037, Brigid	De-enrolment Reason: DCDE - Client Deceased
PHIN: 913562226	De-enrolment Date: 02-Sep-2021

MHRN:	Home Clinic Name: Test CR Clinic UAT
Date of Birth: 15-May-1952	Home Clinic Identifier: 1000000
Administrative Sex: Unknown	EMR: ChartStar
	Provider Name:
	Provider Billing Number:

OK

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

Home Client/Enrolment Scheduled Reports Notifications

Welcome swelendagoda Logout

Print Pending Activities Return to (Test CR Clinic UAT)

Pending Activities (Test CR Clinic UAT)

Type

Rejection

From

16-Sep-2021

To

15-Dec-2021

The following is a list of records that require attention. Some may require an u

- Check the box in the appropriate row
- Select **Apply** at the bottom of the page. You may check multiple rows before select

	Activity Creation Date	Type
<input type="checkbox"/>	06-Oct-2021	Rejection

Page 1 (of 1)

Reason

--Select--

RCDE - Client Deceased

RCIT - Client Identifier Type Invalid

RCLU - Client Unidentifiable

RDCR - Data Correction Required

RDOB - Enrolment Start Date before Date of Birth

REXA - Existing Active Enrolment

RFED - Future End Date

RFSD - Future Start Date

RHCU - Home Clinic Unidentifiable

RHED - Historical End Date

RHSD - Historical Start Date

RVP - Invalid Provider

RPEC - Passive Enrolment Conflict

RSEO - Start and End Date Order

Description

0, Client 955334126 - Deceased Date 25-

Click Apply to remove checked rows from your Pending Activities

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

Rejection Detail - 06-Oct-2021 ✕

Client Name: CancelCode, Pinenut	Rejection Reason: RCDE - Client Deceased
PHIN: 955334126	Deceased Date: 25-Aug-2016

MHRN:	EDTR Clinic Identifier:
Date of Birth: 20-Apr-1986	Home Clinic Name: Test CR Clinic UAT
Administrative Sex: Female	Home Clinic Identifier: 1000000
	EMR: ChartStar
	Provider Name:
	Provider Billing Number:

OK

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

Pending Activities (Test CR Clinic UAT)

Type: Notice **Reason:** NCDU - Client Deceased Information Update **Description:**

From: **To:** **Reason:** NCDU - Client Deceased Information Update
NCER - Client Enrolment Reinstated

The following is a list of records that require attention. Some may require an update in your EMR. Once the record is remediated:

- Check the box in the appropriate row
- Select **Apply** at the bottom of the page. You may check multiple rows before selecting **Apply**.

<input type="checkbox"/>	Activity Creation Date	Type	Reason	Description
<input type="checkbox"/>	29-Oct-2021	Notice	NCDU - Client Deceased Information Update	Home Clinic ID 1000000, Client 914009508 - Test-MergeRetest, Flynn, Deceased Date 01-Oct-2021
<input type="checkbox"/>	24-Sep-2021	Notice	NCDU - Client Deceased Information Update	Home Clinic ID 1000000, Client 913562226 - Test-DC-037, Brigid, Deceased Date 02-Sep-2021
<input type="checkbox"/>	23-Sep-2021	Notice	NCDU - Client Deceased Information Update	Home Clinic ID 1000000, Client 955334154 - CancelCode, Macadamia, Deceased Date 14-May-2021
<input type="checkbox"/>	16-Sep-2021	Notice	NCDU - Client Deceased Information Update	Home Clinic ID 1000000, Client 906186597 - Test-DC-033, Cedric, Deceased Date Removed

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

Notice Detail - 30-Sep-2021

Client Name: DC-TestC2-107, Ella
PHIN: 901411204

MHRN:
Date of Birth: 22-Jul-1945
Administrative Sex: Female

Notice Reason: NCER - Client Enrolment Reinstated
Enrolment Start Date: 09-Mar-2020

Home Clinic Name: Dr. Marc Susser Medical Corporation
Home Clinic Identifier: 1000003
EMR: Test1
Provider Name: Test10, Test10
Provider Billing Number: 09833

[OK](#)

Notice Detail - 29-Oct-2021

Client Name: Test-MergeRetest, Flynn	Notice Reason: NCDU - Client Deceased Information Update
PHIN: 914009508	Deceased Date: 01-Oct-2021
MHRN:	Home Clinic Name: Test CR Clinic UAT
Date of Birth: 01-Nov-1954	Home Clinic Identifier: 1000000
Administrative Sex: Male	EMR: ChartStar
	Provider Name:
	Provider Billing Number:

OK

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

Notice Detail - 16-Sep-2021

Client Name: Test-DC-033, Cedric	Notice Reason: NCDU - Client Deceased Information Update
PHIN: 906186597	Deceased Date: Removed
MHRN:	Home Clinic Name: Test CR Clinic UAT
Date of Birth: 11-May-1952	Home Clinic Identifier: 1000000
Administrative Sex: Female	EMR: ChartStar
	Provider Name:
	Provider Billing Number:

OK

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

Home Client/Enrolment Scheduled Reports Notifications Welcome sweindagad Logout

Search Client

PHIN: Last Name: Administrative Sex: --Select--

MHRN: First Name: Client Status*: ☒ Active ☐ Deceased

Other Identifier: --Select-- Date of Birth: DD-Mon-YYYY

Other Identifier Value:

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

Home Clinic Portal

Home Client/Enrolment Scheduled Reports Notifications Welcome swelendagoda Logout

Search Client

PHIN: Last Name: Administrative Sec:

MHRN: First Name: Client Status: ☒ Active ☒ Deceased

Other Identifier: Date of Birth:

Other Identifier Value:

Name	Identifier	DOB	Administrative Sex	Client Status
Cpctest1, Cathy	PHIN: 909746765	09-Jul-1975	Female	Active
CPStest2, Jimmy	PHIN: 918855014	07-Jul-1999	Male	Active
CRUpgradeTest, James	PHIN: 114421037	31-Dec-2003	Male	Active
DC-TestC2-001, Elnora	PHIN: 917865509	24-Apr-1963	Female	Deceased
DC-TestC2-002, Hoa	PHIN: 911913486 MHRN: 332111	05-Aug-2009	Male	Active
DC-TestC2-003, Larissa	PHIN: 911765142	03-Apr-1970	Female	Deceased
DC-TestC2-004, Natalie	PHIN: 901473093	27-May-1985	Male	Active

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

Client Details (Deceased)

Client: DC-TestC2-001, Elnora Phone: PHIN: 917865509

Date of Birth: 24-Apr-1963 Address: Alberta MHRN:

Administrative Sec: Female

Client Status: Deceased

Client Status Date: 15-May-2021

Enrolment History Client Status History

As of: 15-Dec-2021 Today Include Corrected History ☐ Enrolment Wizard

Home Clinic Name	Enrolment Dates	Status	Provider	Client Provider Relationship Dates
Not Authorized	Start: 01-May-2021 Active: 01-May-2021 End: 15-May-2021	De-enrolled		



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.

Client Details (Deceased)

Client: DC-TestC2-005, Cheryl

Date of Birth: 15-Dec-1963

Administrative Sex: Male

Client Status: Deceased

Client Status Date: 03-Aug-2021

Phone:

Address: Manitoba

PHIN: 917814914

MHRN: 222444

Enrolment History

Client Status History

Modified Date	Modified By	Client Status	Client Status Date
16-Aug-2021	sysadmin	Deceased	03-Aug-2021
13-Aug-2021	admin-swelendagoda	Active	13-Aug-2021

Enrolment Wizard

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

Historical Enrolment

Data Correction

DC-TestC2-005, Cheryl: 917814914

Please select a wizard option listed to the left

For data correction, please contact the home clinic team

Local: 204-926-6010

Toll Free: 1-866-926-6010

Email: homeclinic@sharedhealthmb.ca

Close

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

Home Clinic Name	Home Clinic Identifier	Provider Billing ID	Provider Name	Rejection Code / Reason	Identifier(s)	Last	Client Name 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)