

Using the Primary Care Data Extract for Enrolment

All registered Home Clinics are eligible to submit an initial bulk enrolment using the Primary Care Data Extract (PCDE), and some Home Clinics are eligible to use the PCDE for ongoing enrolment purposes.

Should you have any questions regarding the use of the PCDE for enrolment purposes, submission methods or processing of enrolment data, contact the Home Clinic team at 204-926-6010, 1-866-926-6010 or homeclinic@sharedhealthmb.ca.

Please note that this document is not reflective of those Home Clinics using Enrolment Service.

EMR Eligibility

The following outlines which EMRs, used by Home Clinics, are able to use the PCDE for enrolment related purposes.

	<u>EMRS CERTIFIED FOR THE PRIMARY CARE QUALITY INDICATOR REMINDERS AND DATA EXTRACT</u>	OTHER
INITIAL (ONE-TIME) BULK ENROLMENT	Eligible: Submit using upload to Home Clinic Portal	Eligible: Submit using secure CD or USB
ONGOING ENROLMENT	Eligible: Submit using upload to Home Clinic Portal	Not eligible: enrolment must be completed using the Home Clinic Portal
SUBMISSION OF DATA TO MAINTAIN HOME CLINIC STATUS & IN SUPPORT OF TARIFFS (CCM/CDM) AND AGREEMENTS (MYHT/ITDI)¹	Eligible: Submit monthly using upload to Home Clinic Portal	Eligible: Submit quarterly using secure CD or USB

¹ CCM – Comprehensive Care Management, CDM – Comprehensive Disease Management, MyHT – My Health Team, ITDI – Interprofessional Team Demonstration Initiative

Limitations

There are several scenarios in which the PCDE will not support patient enrolment. The Home Clinic Portal must be used for initial and ongoing enrolment transactions related to these patients. These include:

- Enrolled patients whose last visit date is more than five years ago (60 months); only patients whose last visit occurred within the last five years are included in the PCDE data
- Within a shared EMR² not using Enrolment Service:
 - Any enrolled patient who is not associated with a Most Responsible Provider; for these patients, it is not possible to identify the correct Home Clinic for enrolment.
 - Any enrolled patient associated to a Most Responsible Provider who is practicing in and associated with more than one Home Clinic using the same, shared EMR; for these patients, it is not possible to identify the correct Home Clinic for enrolment.

Other Limitations

Additional limitations of the PCDE include:

- For successful processing, the Home Clinic must provide appropriate patient identifying information with any enrolment record. For example, a patient record that is missing the patient's date of birth or gender would not be processed.
- The PCDE cannot be used for ongoing corrections to patient demographic data such as Date of Birth or Administrative Sex.

Corrections to patient demographics must be made first in the EMR, and then via the Home Clinic Portal or Enrolment Service.

² A Shared EMR traditionally means sharing of a single EMR database across multiple primary care clinics such as those in a Regional Health Authority. However, it may also apply to virtual Home Clinics. For example, one primary care clinic that uses a single EMR database would be considered to be using a shared EMR if they formed two or more separate Home Clinics.

Enrolment Data Processing – Initial One-Time Bulk Submission

The Primary Care Data Extract includes limited enrolment data. This requires interpretation of the data. For the initial or first submission, data will be interpreted as described below:

EXTRACT DATA	INTERPRETATION
Provider Identification	Indicates the identity of the Most Responsible Provider (MRP) to be associated with the enrolled patient.
Enrolment Start Date	<p>If the Enrolment Start Date is populated, it will be interpreted as follows:</p> <ul style="list-style-type: none"> Date = 01/01/1899 indicates a patient enrolled using the Passive enrolment method. In this case, the date the PCDE is processed is used to represent the Enrolment Start Date and the Patient-MRP Relationship Start Date Date = any date other than 01/01/1899 indicates a patient enrolled using the Active enrolment method. For Active enrolments, the Enrolment Start Date will also be used to represent the Patient-MRP Relationship Start Date.
Enrolment End Date	<p>For Active enrolments: If the Enrolment End Date is populated and is later than the Enrolment Start Date, patient will be enrolled with the Home Clinic and then de-enrolled.</p> <p>For Passive enrolments: If the Enrolment End Date is populated, the patient enrolment will not be processed. Home Clinics will not receive an email notification in this scenario</p>

Enrolment Data Processing – Ongoing Submission

The following table describes how data will be processed when received in a subsequent PCDE submission from the Home Clinic to which the patient is currently enrolled or received from a different Home Clinic.

EXTRACT DATA	CURRENT HOME CLINIC	DIFFERENT HOME CLINIC
Enrolment Start Date	<p>If the initial enrolment was passive and the PCDE Enrolment Start Date is now populated with a date of 01/01/2010 or later:</p> <ul style="list-style-type: none"> Active Enrolment Date is set to the new date, indicating the enrolment method is now Active 	<p>If the enrolment Start Date is populated, it will be interpreted as follows:</p> <ul style="list-style-type: none"> Date = 01/01/1899 indicates a client enrolled using the Passive Enrolment method. If the client's existing enrolment record is also Passive this record will be

	<ul style="list-style-type: none"> Enrolment Start Date will remain as the date on which the original enrolment was received (PCDE processed date) <p>Once a client is actively enrolled, updates to Enrolment Start Dates will not be processed. Processing those changes would result in inaccurate reporting of continuity with the Home Clinic.</p> <p>If a client is re-enrolled to your Home Clinic, the enrolment data will not be processed if the new Enrolment Start Date is equal to the Enrolment End Date. Home Clinics will receive an email notification in this scenario</p>	<p>rejected. Refer to Remediating Enrolment Records for tips on resolving this rejection.</p> <ul style="list-style-type: none"> Date = any date other than 01/01/1899 indicates a client enrolled using the Active enrolment method. <p>If client enrolment changes to a new Home Clinic, the prior Home Clinic receives an email notification</p>
Provider Identifier	<p>Indicates the identity of the Most Responsible Provider to be associated with the enrolled client. When a new Provider Identifier is submitted for an enrolled client, it will be processed as an MRP change.</p> <ul style="list-style-type: none"> The new Provider ID is associated as the MRP for the enrolled client Client-MRP Relationship Start date is set to the PCDE processed date (e.g. June 15) Client-MRP Relationship End Date for the prior MRP is recorded as the PCDE processed date less one day (e.g. June 14) 	<p>If client enrolment is changing to a new Home Clinic, the Provider ID will indicate the identity of the Most Responsible Provider to be associated with the enrolled client. For Active enrolments, the Enrolment Start Date will also be used to represent the Client-MRP Relationship Start Date. For Passive enrolment, the Client-MRP Relationship Start Date will be set to the PCDE processed date.</p>
Enrolment End Date	<p>If the PCDE Enrolment End Date is populated with a date later than the Enrolment Start Date, the client will be de-enrolled from the Home Clinic.</p>	<p>If the Enrolment End Date is populated but is later than the Enrolment Start Date, this will indicate an already de-enrolled client.</p>