Generating a list of enrolled clients

This quick reference contains instructions on how to generate, view, and export a list of all enrolled clients within the Home Clinic Portal who are associated and not associated to a main Primary Care Provider at your Home Clinic.

Getting started

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

Generating an enrolled Client List report from the Clients tab

1. Select the *Clients* tab from the View Home Clinic screen.

By default, the Client List report will display results as of the date run and include patients enrolled both actively and passively for all providers associated to the Home Clinic. The report criterion can be adjusted for a different As of date, a specific Enrolment Method and/or for a specific Provider including patients only enrolled to the Home Clinic (Provider - None).

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.

> **!** *To obtain a summary count of enrolled patients, move to Step 3.*

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

Select the Excel option if your goal is to see a summary count for enrolled patients and follow the instructions in the next section.

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

4.

Managing your exported Client List in Excel format

The following is a guide on how to adjust the excel report to obtain summary counts by unmerging grouped cells and adding/removing filters. To review a quick online video of these instructions, watch How to use Microsoft Excel to optimize value of your Home Clinic Portal reports.

1. Select the entire sheet by clicking the small triangle on the top left of the sheet.
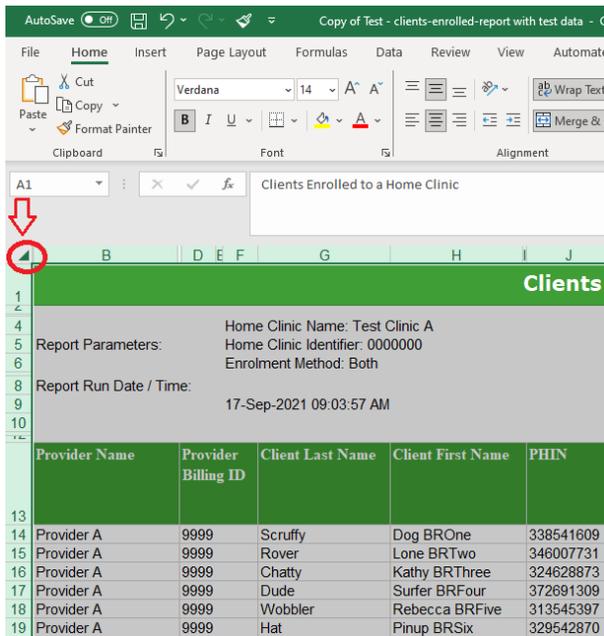
2. From the Home menu, select the **Merge & Center dropdown** and select **Unmerge Cells**.
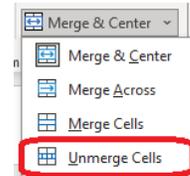
3. Once the sheet is unmerged, select **Wrap Text.** This is to ensure that your headers (column labels) are still visible.
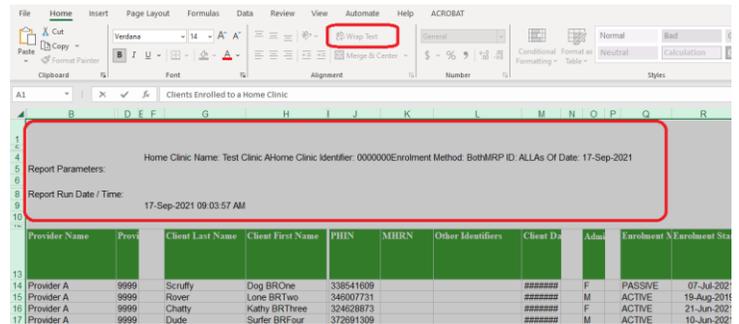
4. Click on row 13 label to highlight row, go to the **Data** menu item and then click on **Filter** to apply the **Sort & Filter option** to the column headers. Filtering allows you to select the data you wish to see in each column. This can streamline the data making it easier to analyze, review and share.
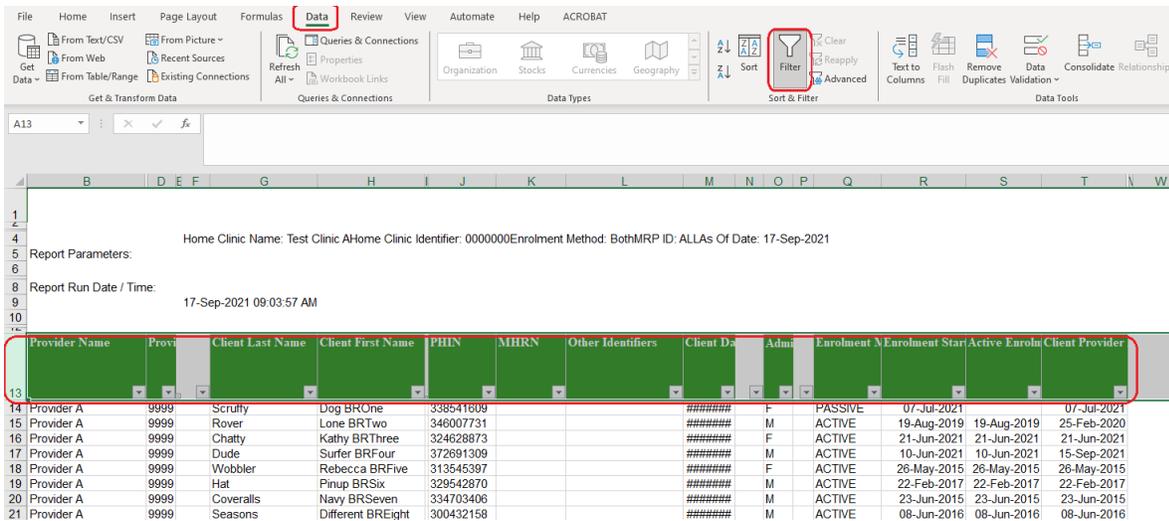
5. Click the dropdown arrow box in any column(s) in row 13 to see the available items for filtering. To select filtering options, use the checkboxes to include or exclude data from the view. Click **OK** to see results.
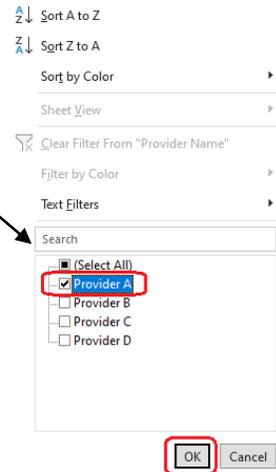
In the example below, only enrolment records for Provider A are included based on the filter applied.

	Provider Name	Provi	Client Last Name	Client First Name	PHIN	MHRN	Other Identifiers	Client Da	Admi	Enrolment M	Enrolment Star	Active Enrol	Client Provider
13													
14	Provider A	9999	Scruffy	Dog BROne	338541609			#######	F	PASSIVE	07-Jul-2021		07-Jul-2021
15	Provider A	9999	Rover	Lone BRTwo	346007731			#######	M	ACTIVE	19-Aug-2019	19-Aug-2019	25-Feb-2020
16	Provider A	9999	Chatty	Kathy BRThree	324628873			#######	F	ACTIVE	21-Jun-2021	21-Jun-2021	21-Jun-2021
17	Provider A	9999	Dude	Surfer BRFour	372691309			#######	M	ACTIVE	10-Jun-2021	10-Jun-2021	15-Sep-2021
18	Provider A	9999	Wobbler	Rebecca BRFive	313545397			#######	F	ACTIVE	26-May-2015	26-May-2015	26-May-2015
19	Provider A	9999	Hat	Pinup BRSix	329542870			#######	M	ACTIVE	22-Feb-2017	22-Feb-2017	22-Feb-2017
20	Provider A	9999	Coveralls	Navy BRSeven	334703406			#######	M	ACTIVE	23-Jun-2015	23-Jun-2015	23-Jun-2015
21	Provider A	9999	Seasons	Different BREight	300432158			#######	M	ACTIVE	08-Jun-2016	08-Jun-2016	08-Jun-2016
22	Provider A	9999	Data	Records BRNine	352011127			#######	M	ACTIVE	09-Aug-2016	09-Aug-2016	09-Aug-2016
23	Provider A	9999	Large	Print BRTen	324506420			#######	M	ACTIVE	04-Mar-2016	04-Mar-2016	04-Mar-2016
24	Provider A	9999	Way	Milky BUOne	317068215			#######	M	ACTIVE	23-Feb-2016	23-Feb-2016	18-Mar-2020
25	Provider A	9999	System	Solar BUTwo	385118757			#######	F	ACTIVE	24-Nov-2015	24-Nov-2015	25-Feb-2020
62													
63													
64													

6. When you have a filter applied, you can quickly view the count on the bottom left of the worksheet. 12 of 48 records found are enrolled to Provider A.

7. To clear an applied filter, click the dropdown arrow in the applicable column header then either click the **Select All** box or use the **Clear Filter** option.

Contact your Home Clinic Liaison or the Home Clinic team for more support - homeclinic@sharedhealthmb.ca.