

This tip guide highlights features and functionality of the newest version of ClinicalConnect (Release 5.1). Additional resources are available by visiting the ClinicalConnect Resource site <https://info.clinicalconnect.ca/CC/healthcare/resource-centre-main>.

Patient Dashboard - create your own Patient Dashboard view to suit your clinical needs; simply drag and drop module icons into the dashboard area below the header. Icons in the Patient Dashboard represent clinical modules. Hovering over each icon displays the name of the module it represents. Icons dropped to the left or right of an existing module will display data in a side-by-side view; example shows Microbiology and Pathology modules. Icons dropped below existing modules will display in full-width view (e.g. Transcriptions module in full-width view).

Close ✕ to remove module from Dashboard and return its icon to Patient Dashboard header. You can add module back to Dashboard at any time.

Report Technical Issues - Click to report technical issues with the HITS Helpdesk.

Click to **expand and collapse** navigation menu.

The screenshot shows the ClinicalConnect desktop interface. At the top, there's a header with the ClinicalConnect logo and patient information for MARX, GROUCHO. Below the header is a navigation menu on the left. The main content area displays several modules. The 'Transcription' module is in full-width view, showing a list of transcription records. The 'Microbiology' and 'Pathology/Genetics' modules are in side-by-side view. A 'Smart Filter' is applied to the transcription results. A 'Primary navigation toolbar' is visible at the top right, and a 'Preference Setup Wizard' is also present.

Smart Filter - available in most modules, patient search results, and census lists to narrow list of results to display only those related to text entered, and can use AND/OR conditions:

- **AND conditions** - Insert space between complete or partial keywords (e.g. disch consult) to show results that start with those keywords
- **OR conditions** - Insert comma between complete or partial keywords (e.g. disch , consult) to show results that include at least one of the keywords

Help Function available throughout ClinicalConnect. Click to launch help videos or documents in separate window.

Column Filters used to filter module results and lists by date and/or keyword.

Scroll left and right using scroll bar at bottom of results view to see all available columns of data.

Primary navigation toolbar includes **Simple** and **Advanced Search**, **Links** to resources, and **Census** lists.

Preference Setup Wizard - guides you through setting values associated with how you prefer to retrieve and view data, with options to select different values for desktop and mobile devices, and the Patient Dashboard.

Preferences can also be set in each module or census list by selecting the **Preferences** icon.

Accessing the Notification Subscription List To access the Notification Subscription list when in a patient's record, select the **Census** link from the top of the screen. Refer to Notification Subscription section in this guide for more details.

Patient Visits Timeline displays visits for all hospital encounters. Hover over coloured indicator
 ● Admissions, ● Outpatient, ● Emergency for info about visit. Click indicator to change encounter and access the Visits module.

Visit Change - Selecting a visit from the timeline will present with a "Visit Change" alert and if **'Applied'**, will refresh the module view and only show results for the selected visit/encounter. The Encounter filter will change to show encounter-specific data. The 'Visit Change' message alert can be suppressed by selecting the **"Never show this dialog in the future"**. It can be re-activated again from the Global Preferences/ **Patient** preference settings. Select **✕ Reset** to reset the data to the previous preference settings.

Notification Subscriptions click the **Not Subscribed** button to subscribe to receive email notifications when new results become available in the patient's record for select modules and from select source systems. If the patient's encounter associated with their Medical Record Number or equivalent is already subscribed, the **Subscribed** button will display.

Click your **Name** to access the **Preferences Setup Wizard**, view account profile and log out of ClinicalConnect.

Click to **expand and collapse** patient header information.

Click **Add or Remove Patient** icon in the patient header to add or remove a patient from Worklist

Frequent ED Visits icon five or more ED visits at acute care facilities in South West Ontario within the last 366 days from most current encounter.

Clear Filters removes all column keyword and date filters

Module Preferences appears on right side of the module name

Click to **Print** module lists or details

Refresh checks for new results

Full screen view collapses both navigation and demographics, leaving more room to view data

Default Details View toggles details view from right side, or below List view

The screenshot shows the ClinicalConnect interface for patient MARX, GROUCHO. The top navigation bar includes links for Census, Notifications, and a 'Not Subscribed' button. The left sidebar lists various modules like Dashboard, Admissions, eReferral, Allergies, Blood Bank, Cardiology, Home/Community Care, Health Records, Face Sheet, Labs, Microbiology, New Results, Orders, Pathology/Genetics, Pharmacy, Primary Care, Radiology, Transcription, Visits, and Report Technical Issue. The main area displays a timeline of visits and a list of lab results. A column filter dropdown menu is open, showing options like '17-HYDROXY PROGESTERONE-PEDS', '24H URINE PROTEIN', 'ACETAMINOPHEN', 'ALBUMIN', 'ALKALINE PHOSPHATASE FRACTIONATION', 'APIXABAN', 'ARTERIAL BLOOD GASES', 'AST', 'B-HCG, SERUM', and 'BILIRUBIN, CONJUGATED'. The lab results table has columns for Collected Date, Test, Department, Normalcy, Status, and Facility.

Enter **start and end dates** to narrow results based on date.

Retrieving Data progress bar indicates progress as data is being retrieved from source systems; data will display as it's retrieved.

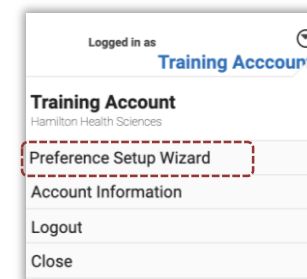
Click to filter list by keywords using the **Column Filter**. Optionally, enter text to find specific keywords to use in filter. Select each keyword you want to use to filter list.

Other Patient Header Icons

- Mother Link
- Deceased Patient
- Health Links
- Patient Matches
- Baby Link
- VIP Flag

Preference Setup Wizard NEW

The new Preference Setup Wizard guides you through how to set the values associated with how you prefer to retrieve and view data in ClinicalConnect. It allows you to select different options for desktop and mobile devices, as well as when you're using the portal's Patient Dashboard. Your preferences only need to be set and saved once, and will be retained for all subsequent uses. Should you need to change your preferences in the future, you can use the Preferences option within each module and Census List, or you can return to the Wizard by clicking on your name in the top right corner of this screen and select 'Preference Setup Wizard'.



The top section allows you to apply the same preference settings to all applicable modules at once for **Desktop, Mobile, or Dashboard**.

To further customize individual preferences for **Desktop, Mobile, or Dashboard**, first select the tab, then expand the section by clicking the arrow and select the value from the **dropdown** list.

Expand All and **Collapse All** buttons can be used to see a full view of modules and preference options.

Preference Setup Wizard

Encounter View Preferences: Step 1 of 9
Go to Step

DESKTOP All Regional Encounters ?

MOBILE Encounter ?

DASHBOARD All Regional Encounters ?

Note: Changing the preference value above will affect the following modules.
 If you wish to set a different value for a specific module then select it below to update the specific preference value.
 Changes will not be persisted until you select Save & Continue.

DESKTOP MOBILE DASHBOARD

Modules Expand All Collapse All

Pathology & Genetics

Pathology & Genetics - Encounter: All Regional Encounters

Transcription

Transcription - Encounter: Select One
Encounter Patient

Micro

Health Records

Radiology

Blood Bank

Blood Bank - Product List: Encounter: All Regional Encounters

Blood Bank - Test List: Encounter: All Regional Encounters

Blood Bank - Trend Tests: Encounter: All Regional Encounters

Pharmacy

Pharmacy - Encounter: All Regional Encounters

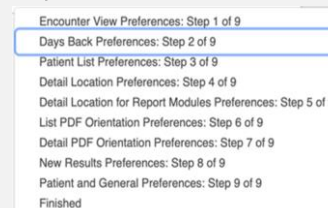
Home Meds

Lab

Cardiology

Save & Continue

To adjust a specific preference using the Wizard, click the **Go to Step** button and select the desired step.



After completing your preference selections, click **Save & Continue** to proceed to the next step. Ensure you log out of ClinicalConnect after exiting the Preference Setup Wizard and the next time you log back in, your new preferences will take effect.

Notification Subscriptions for New Results NEW

Select users with full web access to ClinicalConnect, and who are using log in credentials supplied by Hamilton Health Sciences, have the option to subscribe to receive email notifications when new results become available in the patient's record for select modules. Currently, this functionality is not available to users who access ClinicalConnect with ONE ID credentials, or users who are set up to launch ClinicalConnect only from their clinical information system (called Contextual Launch Only/Restricted Contextual Launch). Initially, this functionality will only be available for ClinicalConnect users at Hamilton Health Sciences with plans to deploy more broadly.

! The Notification Subscription to receive email alerts that New Result(s) are available in select modules and from select source systems only applies to a patient's subscribed encounter which is associated with their Medical Record Number (MRN) or equivalent. If the patient has encounters at additional facilities with different MRNs, you need to select and subscribe to all applicable MRNs that you wish to receive notifications of new results for.

How to Set Up a Notification Subscription

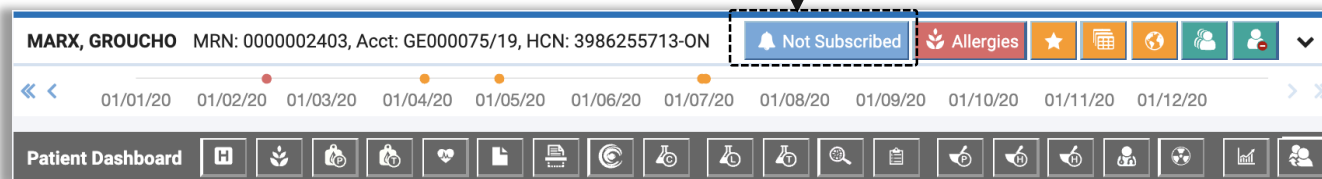
To subscribe to receive email notifications for a specific patient, when new results become available click the **Not Subscribed** button located in the patient header.

If this is your first subscription, you'll need to define your notification Preferences, which will apply to all notifications for all patients that you subscribe to. Click **Save & Continue** to move to the next step.

If you've already set your notification preferences previously, you will not be required to complete this step.

Notification Email - add your preferred email address where you'd like the New Result notifications to be sent. Ensure you enter your email address correctly so that the notifications can be delivered.

Frequency (minutes) - define how often you wish to receive New Result notifications. Based on the minute value added in this field, ClinicalConnect will aggregate any new results available for all subscribed patients and will send you one email notification.



Notification Subscription Settings

Full Name: MARX,GROUCHO MRN: 0000002403 Account Number: GE000075/19 HCN: 3986255713

Please set the preferences which will be used for all patient notifications.

Notification Email

Frequency (minutes)

Expire this subscription

☐ When I Unsubscribe
☐ On Discharge
☒ X Days after Discharge

Days after Discharge:

Save & Continue

After completing your notification preferences, which will apply to all notifications for all patients that you have subscribed to, click **Save & Continue** to move to the next step.

By default, the subscription is set to expire 'When I Unsubscribe' but this can be changed as needed for each patient. If the patient is currently an admitted inpatient, you can choose to unsubscribe them 'On Discharge' or 'Days after Discharge' by selecting the number of days from the dropdown list.

You are now ready to select some or all of the modules that will apply to the New Result notifications for this patient.

🔔 This notification functionality is built on the existing New Results module which is limited to aggregating new results from direct data integrations from select acute care hospitals in south west Ontario and based on the user's New Results preference settings. Provincial repository data does **NOT** support the New Results/Notifications feature. Results are determined to be "new" based on your individual Preference settings and are flagged as "new" up to a maximum of 72 hours back from your current log in and for those results that you have not already viewed within your set parameters. If you've enabled New Results for select modules, then only those modules will be available in your Notification Subscriptions for each patient you subscribe.

You can select which modules for each patient you'd like notifications by selecting some or all of the modules from the **Notification Subscription Settings** window.

To set up Lab notifications, expand the option for **New Results Lab** then select whether you want to receive an email notification for **ALL** new Lab results, or just new **Abnormal** Lab results for this patient.

Click the **Save** button to create the notification subscription. You also have the option to return to the **Preferences** screen to change your email address or notification frequency, or to **Unsubscribe** the patient.

Expire this Subscription is used to define when you want this subscription to expire for this specific patient.

Notification Subscription Disclaimer

The Notification Subscription to receive email alerts that New Result(s) are available in select modules and from select source systems only applies to a patient's subscribed encounter which is associated with their Medical Record Number (MRN) or equivalent. If the patient has encounters at additional facilities with different MRNs, you need to select and subscribe to all applicable MRNs that you wish to receive notifications of new results for. New Result notifications only apply to data that is available from select acute care facilities in south west Ontario and will not include notifications for data from provincial repositories, Home/Community Care Services, or for patient encounter records where the Source system is identified as 'eHealth Ontario'. Please refer to the Integration Status Chart to see the hospitals that flag New Results (and for which New Results notifications can be subscribed to).

✕ Close

After saving the notification subscription, you'll be presented with the following message reminder regarding New Result Notifications.

Click **Close** to return to the patient's record.

Once you've completed the subscription, the patient's header will now display the **Subscribed** icon. Clicking this icon will take you to the patient's subscriptions where you can modify or unsubscribe as needed.



Notification Subscription Email

You will receive email notifications from ClinicalConnect alerting you of new results for the patients that you have subscribed to, based on your defined frequency and the modules you selected for each patient. ClinicalConnect will aggregate any new results available for each subscribed patient and will send one email notification for all patients based your defined frequency value, rather than sending multiple emails for each new result. The email will be sent from *noreply2@clinicalconnect.ca* (with ClinicalConnect New Results displayed in the From field in your inbox), and will contain a link to the ClinicalConnect log-in page which you click to log into ClinicalConnect first before accessing your Subscription Notification list of patients to view the available new results. The link will auto-expire in 12 hours from when the email was sent. The following message will display if the link is expired: 'Notification Subscription link is expired.' You can still review your patients New Results by accessing their record.

Accessing your Notification Subscription List of Patients

After subscribing to receive notifications for at least one patient, you will be able to access the **Notification Subscription** tab where all of your patients' subscriptions will be listed as shown below. From this list, you can easily select the patient's record to view their New Results or edit/remove the subscriptions as needed. You can only be subscribed to **a maximum of 75 different patient MRNs**. If you try to exceed the maximum number of notification subscriptions, you will receive this message: 'You have exceeded the maximum allowable subscriptions for a user. Please remove patients from your Notification Subscription list.'

After subscribing to receive notifications for at least one patient, you will be able to access the **Notification Subscription** tab by clicking the CensuS link in the headers, then selecting the tab.

Advanced Search
Patient Search...

Links CensuS Notifications ⁹

Notification Subscription Type to filter results... 5 of 12

	Medical Record Number	Full Name	Admit Date	Current Age	Gender	Attending Physician	Reason For Visit	Module	Modules Subscribed	
4	0000002403	MARX,GROUCHO	12/02/2020 09:24	33Y	M		COUGH & sHORTNESS OF BREATH	Blood Bank Products	3	
Lab: All										
Radiology										
0	0000003392	BRANCH,SOFIA	30/04/2018 11:11	19Y	F	Chan, Ho Man Norman*RETIRED	DI CS	Radiology	1	
3	H000004603	AARON,YULIA	16/05/2018 12:22	58Y	M	Attending, Physician	ADMIT DIAGNOSIS	Blood Bank Products	5	

New Result indicators.

Each patient subscription can be expanded to view the modules that you've subscribed to by clicking the expand ► arrow.

To view the patient's New Results, click on the patient's line item from the list and their ClinicalConnect records will open.

The **Module** names and the number of subscribed modules is listed for each subscription.

The **Edit** icon can be used to modify your notification subscription settings.

The **Unsubscribe** button will unsubscribe you from receiving email notifications for the selected patient.

Patient Search Results Roll Up NEW

When using the Simple Search function, patient search results now display in a rolled-up list view if the patient you searched for has multiple visits at facilities across Ontario. The search results will roll up the patient's encounters only when there is an exact match of the patient's **Last name, Date of Birth** and **Health Card Number** across all encounters. If there is a mismatch in any of the three matching criteria, the patient's non-matching record(s) will not roll up and will remain listed as separate line items. The rolled-up search results will always display the most recent encounter from the source facility as the first line item, as shown in the example below. This functionality makes the search results list much shorter and more efficient when selecting the correct patient record.

Selecting any patient's encounter from the rolled-up or expanded search results will display the integrated record for that patient from all contributing sources that are included in the rolled-up list (based on your default user preference filters). Users do not have to select each individual encounter to view all information.

The results counter will show the number of results displayed in the view.
The counter will update if the rolled-up line items are expanded.

Click to **Expand** the rolled-up list.

Search

Type to filter results...

3 of 20

Timestamp: 13:10

Search criteria: marx, groucho

MRN	Full Name	Encounter Date	Account Number	DOB	HCN	Location	Room	Bed	Attending Physician	Facility	Source
000140	MARX,GROUCHO	15/04/2019 12:14	AC000060/19	01/05/1945	1112204456	SURGERY	B3216	1	GEDDES, SCOTT ANDREW	Cambridge Memorial	Cambridge
12170701	Marx, Groucho	27/04/2020 14:56	440372778	01/04/1987	3986255713	U Pathology Lab			Unknown Physician, Physician	LHSC-UC	LTVH
H000002306	MARX,GROUCHO	Sealed	Sealed	03/03/1955		Sealed	Sealed	Sealed	Sealed	Juravinski Hospital	HHS

Once expanded, the patient's encounters from various source facilities will display in the list.

Search	Type to filter results...	20 of 20	Timestamp: 11:42									
Search criteria: marx, groucho												
MRN	Full Name	Encounter Date	Account Number	DOB	HCN	Location	Room	Bed	Attending Physician	Facility	Source	
000140	MARX,GROUCHO	15/04/2019 12:14	AC000060/19	01/05/1945	1112204456	SURGERY	B3216	1	GEDDES, SCOTT ANDREW	Cambridge Memorial	Cambridge	
12170701	Marx, Groucho	27/04/2020 14:56	440372778	01/04/1987	3986255713	U Pathology Lab			Unknown Physician, Physician	LHSC-UC	LTVH	
0000002015	MARX,GROUCHO	20/12/2017 10:52	J0200113890	01/04/1987	3986255713	STEP DOWN UNIT	4122	03	Alharbi, Laila Mohammed	St. Joseph's Healthcare Hamilt	HHS	
0000002403	MARX,GROUCHO	12/02/2020 09:24	GE000075/19	01/04/1987	3986255713	EMERGENCY OUTPT GENERAL				General	HHS	
0000002780	MARX,GROUCHO		MI000030/18	01/04/1987	3986255713-JD	MCMaster 2Q FRACTURE CLINIC				McMaster	HHS	
000507089	MARX, GROUCHO	27/02/2017 14:12	20165957	01/04/1987	3986255713-AV	SIXTH WEST	0620	B	RAVID, ANAT	Windsor Regional - Ouellette	Windsor-Ouellette	
000562469	MARX, GROUCHO	05/06/2015 11:27	50704912	01/04/1987	3986255713	BURNS AND PLASTICS CLINIC-MET			ADAMS, HOWARD F	Windsor Regional - Metropolitan	Windsor-Metropolitan	
00813377	MARX, GROUCHO	12/05/2014 11:42	51604672	01/04/1987	3986255713	KW ELECT HISTORY N PHYSICAL EHP	EHP		SHARKEY, PAUL J	Grand River Hospital	GRH	
0200599	MARX, GROUCHO	28/02/2017 11:43	50034800	01/04/1987	3986255713	L2S	243	1	GUERRA, ENRIQUE	Leamington District Memorial	Leamington	
1037645	Marx,Groucho		1037645	01/04/1987	3986255713					HNHB-CCAC	OACCAC	
600003281	MARX, GROUCHO	01/07/2019 16:58	100000002269	01/04/1987	3986255713	FHC Ultrasound GRH	FPUS		LEDDY, DANIELLE S, MD	Grand River Hospital Corporation	WWHUB	