ClinicalConnect Desktop User Guide

This User Guide provides detailed documentation about all the feature and functions found in the latest version of ClinicalConnect, and how those features can be used to best support your patients.

March 12, 2025

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All images and data examples contained in this document are fictitious and intended to simulate realistic records. They contain no real patient data, and are to be used for training purposes only.

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Introduction

ClinicalConnect is a secure, web-based portal that provides physicians and clinicians with real-time access to their patients' electronic medical information from all acute care hospitals, Home and Community Cares (HCCs) and Regional Cancer Programs in South West Ontario, and select provincial data repositories. ClinicalConnect is a fundamental tool in bridging the gap between disparate information systems spanning a wide geographical area and multiple regional health care facilities.

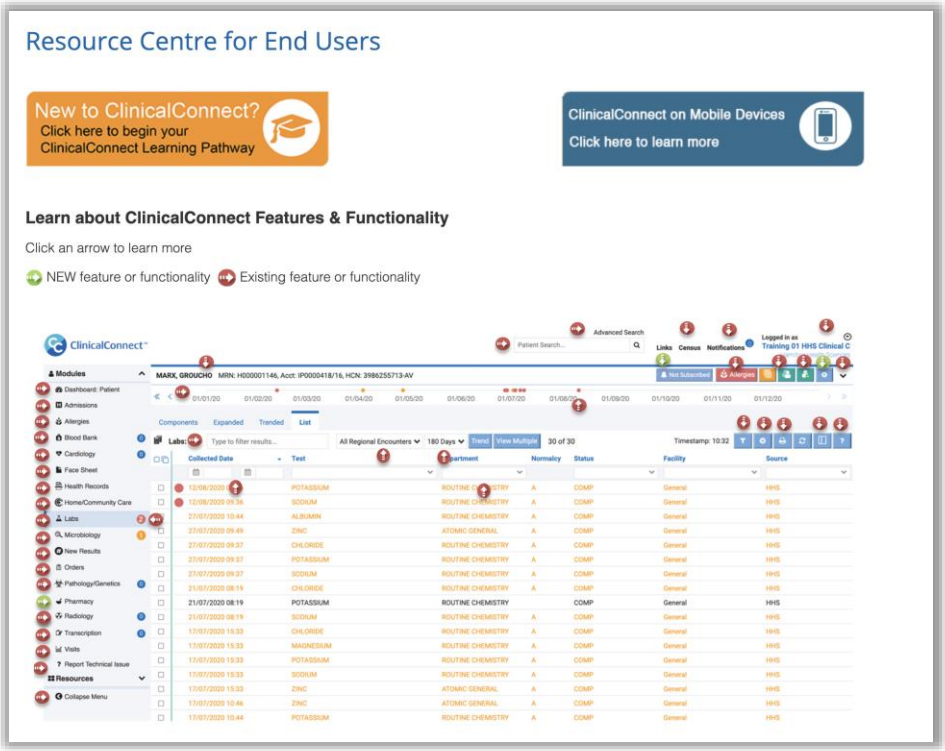
Using ClinicalConnect, clinicians can gather essential integrated patient data in seconds, resulting in quicker diagnosis and treatment and improved patient care and safety. ClinicalConnect helps reduce repeat lab and diagnostic tests with significant cost savings and reduced patient distress.

General features include:

- One consolidated view
- Securely encrypted over the internet
- Accessible on mobile devices
- Users can configure the data views to reflect personal preferences and priorities
- Intuitive, with easy navigation
- All access is subject to audit

Resource Centre for End Users

To learn more about the features and functionality of ClinicalConnect, please visit the Resource Centre https://info.clinicalconnect.ca/CC/healthcare/resource-centre-main



Privacy

A patient's personal health information (PHI) can only be viewed through ClinicalConnect when a user is providing health care to the patient, or assisting in the provision of health care to the patient to whom the information relates. To protect the privacy rights of patients and ensure compliance with the Personal Health Information Protection Act, 2004 (PHIPA), all Users must abide by the privacy and security policies, procedures and practices of their organization, applicable legislation (including but not limited to PHIPA) and applicable professional standards and guidelines. Use of ClinicalConnect for Research or any purpose not related to providing health care or assisting in the provision of health care to a patient who is within your circle of care is prohibited and is subject to disciplinary action.

For more information related to Privacy including User Terms & Conditions visit

https://info.clinicalconnect.ca/CC/healthcare/participants

ClinicalConnect Technical Specifications

To view technical specifications for ClinicalConnect visit

https://info.clinicalconnect.ca/CC/healthcare/about-clinicalconnect

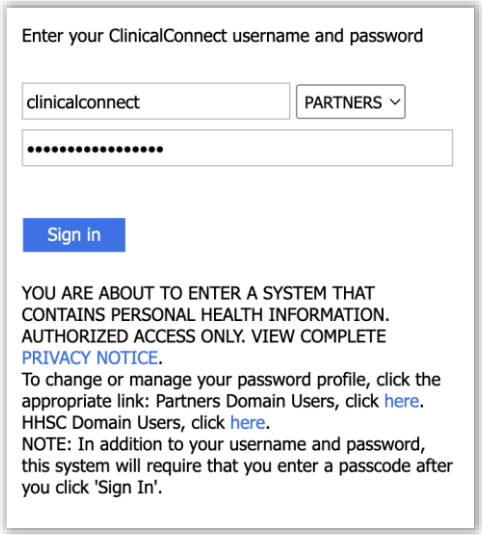
ClinicalConnect is also supported on Mobile devices.

Login

ClinicalConnect can be accessed from https://info.clinicalconnect.ca/CC/healthcare/quicklinks using a supported web browser, or launched directly from your Hospital Information System (in select hospitals).

To log into ClinicalConnect:

1. Enter your username in the **Username** field.
2. Enter your password in the **Password** field.
3. Select the appropriate authentication type from the drop-down box:
   - Partners
   - HHSC
4. Click the **Login** button.



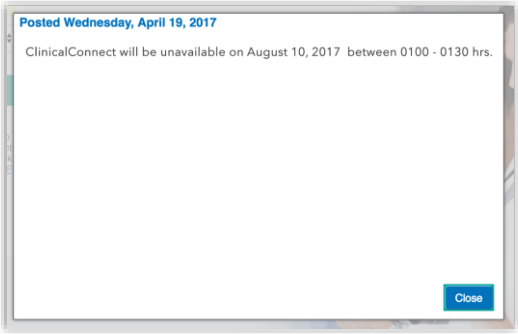
For first time users, you must change your temporary password before logging into ClinicalConnect as well as set up Multi-Factor Authentication. To change your password, click one of the links below the Login button.

Refer to the **Self-Service Password Manager** resources for additional information on setting up your password.

Refer to the **Multi-Factor Authentication** resources for additional information on setting up MFA.

Messages

ClinicalConnect related messages and information are posted in the Messages area below the Login. There may be multiple messages listed in the message centre. To view the details of a message, click on the message title. A popup is displayed showing the contents of the message.

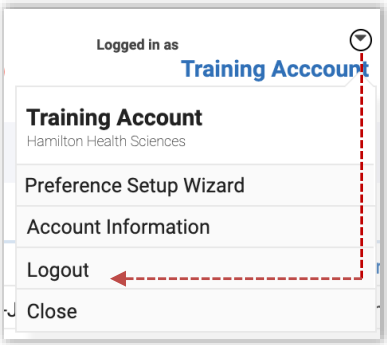


Click the **Close** button to close the message.

Logging Out

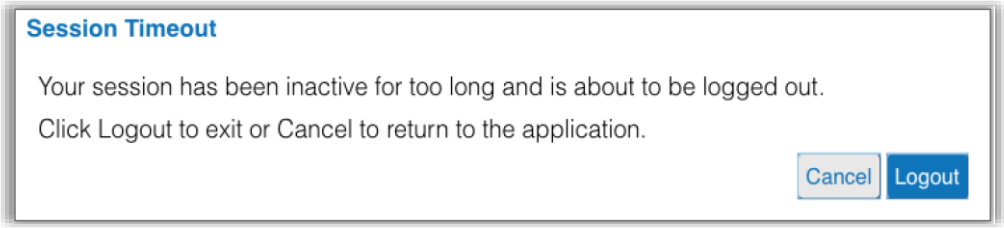
You need to log out of ClinicalConnect after each session.

The log out option is located in top right corner of the screen where your log in name displays. To log out, click your name then click **Logout.**



Session Timeout

By default, your ClinicalConnect session will timeout after 20 minutes of inactivity. You will receive a pop-up message before being automatically logged out:



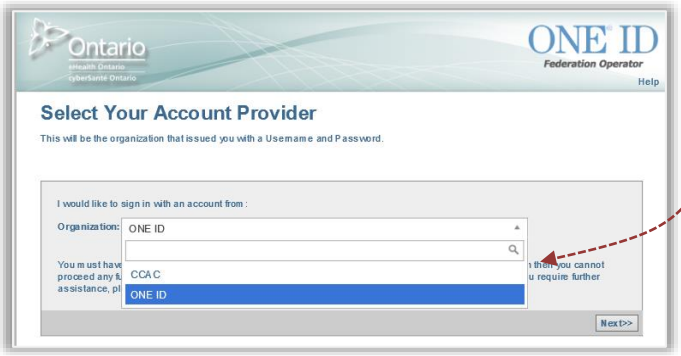
Click the **Logout** button if you want to exit or click **Cancel** if you are still using ClinicalConnect.

Accessing ClinicalConnect using ONE ID or Your Organization's Federated Credentials

ClinicalConnect must be accessed from this web address when using ONE ID credentials or your own organization's federated credentials: https://swo.clinicalconnect.ca. You will be automatically re-directed to eHealth Ontario's ONE ID Federation Operator Login Page.

Your Local Registration Authority who requested your ClinicalConnect access would have informed you of your log in credentials and the iDP type to select from this screen.

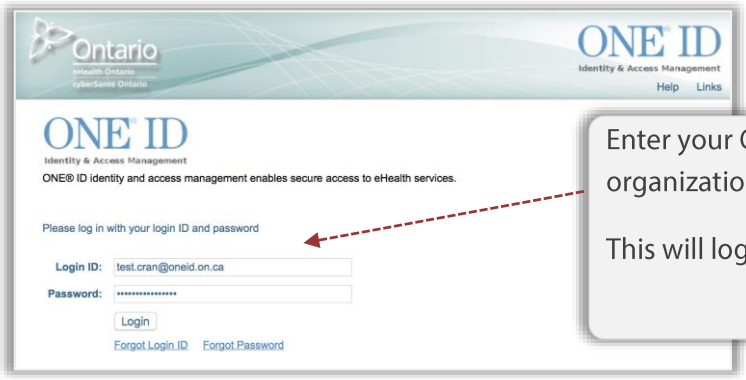
1. Select either ONE ID or your organization's name from the drop down.



Select either ONE ID or your organization's name from the organization drop down then click "**Next**".

If you are unsure what to select, contact your organization's LRA.

2. Enter your ONE ID or organization's credentials.

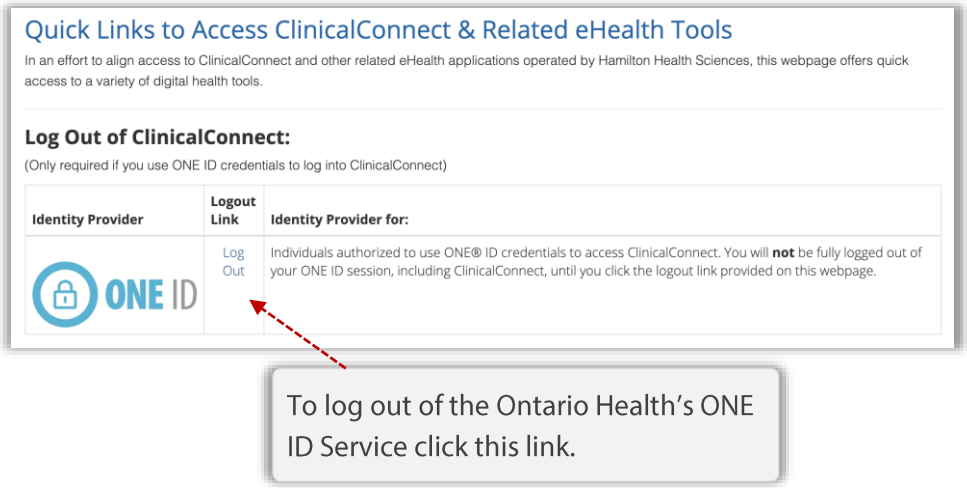


Enter your ONE ID credentials or your organization's credentials then click "**Login**".

This will log you into the ClinicalConnect portal.

Logging Out of Ontario Health's ONE ID Service

If you no longer require ONE ID access for any other services you are using, you must also log out of ONE ID after logging out of ClinicalConnect by clicking on the link shown below.



A message will display, confirming that you have logged out of the ONE ID Service.

Multi-Factor Authentication (MFA)

Users of Participant Organizations that use **Hamilton Health Sciences (HHS) as their Identity/Account Provider** may be prompted to set up and use Multi-Factor Authentication (MFA) when accessing ClinicalConnect via the web.

Multi-Factor Authentication (MFA) adds a layer of security to help prevent unauthorized users from accessing your account. Each time you log into ClinicalConnect, you'll be required to **enter your username and password PLUS a verification code**. You have the option of receiving a verification code by text message (SMS) or via an authenticator app.

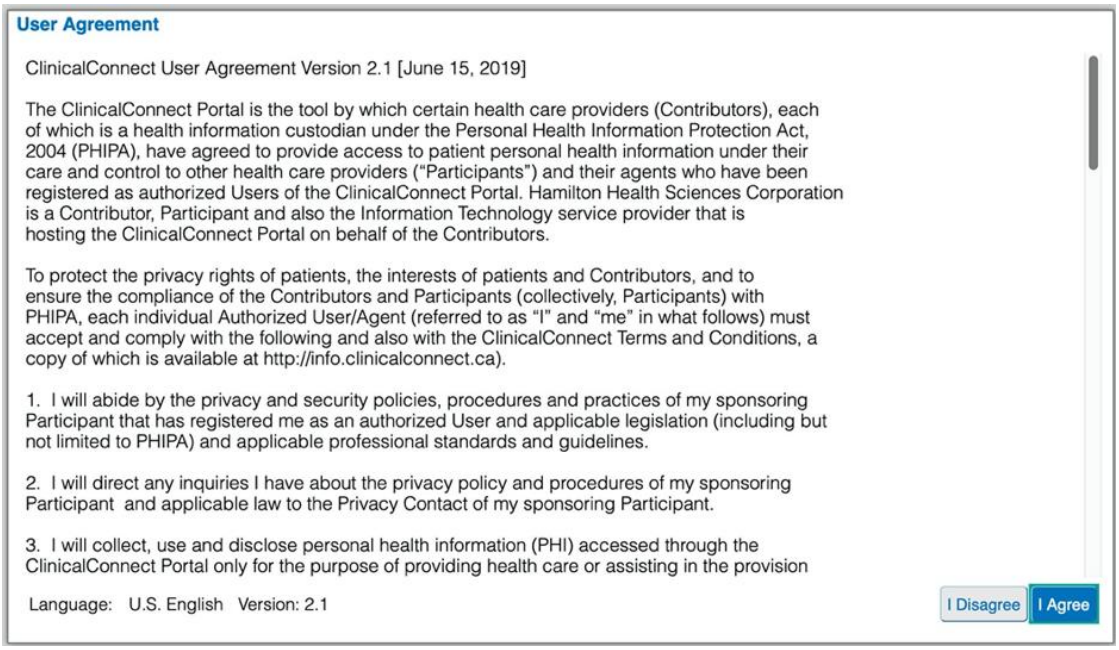
To learn more about setting up your MFA, please review the guide, *"How to set up Multi-Factor Authentication For ClinicalConnect"* on the ClinicalConnect resource centre available here.

User Agreement

The first time you login to ClinicalConnect, you will be prompted to agree to the User Terms & Conditions as outlined in the User Agreement before you can access any Personal Health Information (PHI) in ClinicalConnect. This Agreement is also displayed on an annual basis going forward.

Once you have read and accepted the Terms and Conditions of the User Agreement, a security log entry noting the date and time of your acceptance is made.

Click the **I Agree** button to accept the Terms and Conditions of the User Agreement.

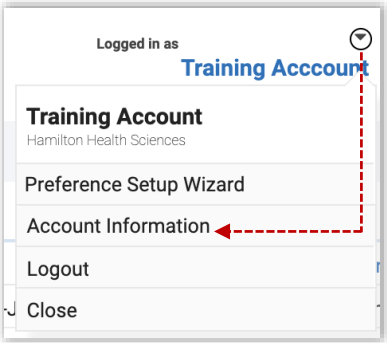


Viewing User Agreements

The User Agreement can be viewed and printed any time.

To view and print the User Agreement:

1. Click your name in the top right corner of the screen.
2. From the drop-down list, click **Account Information**.
3. Select the most recent user agreement from the **User Agreements** section of your account information



User Agreements

Agreement Date	Version
2019-06-19 15:47:52.0	2.1
2019-06-04 10:01:11.0	ClinicalConnect User Agreement Version 2.0

Agreement detail

ClinicalConnect User Agreement Version 2.1 [June 15, 2019]

The ClinicalConnect Portal is the tool by which certain health care providers (Contributors), each of which is a health information custodian under the Personal Health Information Protection Act, 2004 (PHIPA), have agreed to provide access to patient personal health information under their care and control to other health care providers ("Participants") and their agents who have been registered as authorized Users of the ClinicalConnect Portal. Hamilton Health Sciences Corporation is a Contributor, Participant and also the Information Technology service provider that is hosting the ClinicalConnect Portal on behalf of the Contributors.

To protect the privacy rights of patients, the interests of patients and Contributors, and to ensure the compliance of the Contributors and Participants (collectively, Participants) with PHIPA, each individual Authorized User/Agent (referred to as "I" and "me" in what follows) must accept and comply with the following and also with the ClinicalConnect Terms and Conditions, a copy of which is available at http://info.clinicalconnect.ca).

1. I will abide by the privacy and security policies, procedures and practices of my sponsoring Participant that has registered me as an authorized User and applicable legislation (including but not limited to PHIPA) and applicable professional standards and guidelines.

The agreement details display in the window below the list.

Self Service Password Manager

The Self-Service Password Manager (SSPM) is used to customize your own password, reset your forgotten password yourself, change your password to a new one, or unlock your account if it is locked without having to contact your Local Registration Authority (LRA) or the Help Desk.

Please Note: This content only pertains to organizations using Hamilton Health Sciences as their Identity/Account Provider.
To manage passwords associated with ONE ID accounts, please click here.

To use the SSPM, a one-time enrollment process is required.

The following resources are available to help you with SSPM:

First Time Login
How to change your temporary password and enroll in SSPM | Video

Reset My Password
How to reset your forgotten password | Video

Unlock My Account
How to unlock your account after five unsuccessful login attempts | Video

Changing My Password
How to change your password if your account has been compromised | Video

Enroll in SSPM
How to enroll in SSPM | Video

For Additional Information please refer to the resource website
https://info.clinicalconnect.ca/CC/healthcare/resource-centre-selfservice-password-manager

Under Authority of (UAO) Selector

Show Me

Ask a Question

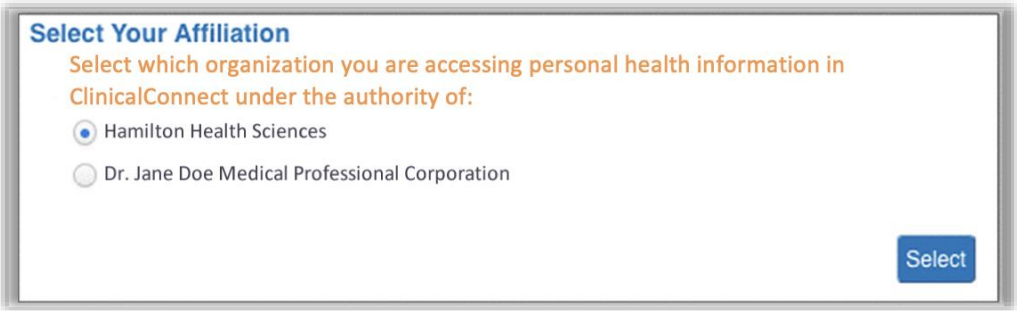
You can use a single login if you've been authorized to access ClinicalConnect by multiple organizations and are considered to be an Agent of more than one healthcare organization. If you are authorized to access Personal Health Information (PHI) to provide care to patients on behalf of multiple organizations, you will be prompted after logging into the portal with the new **Under Authority Of (UAO) Selector**. This function also allows you to toggle between organizations once you've logged into ClinicalConnect without having to log out.

All accesses to ClinicalConnect is subject to audits that reflect which organization you are acting under authority of.

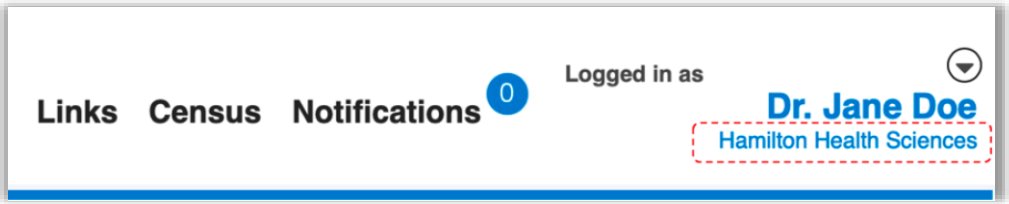
UAO Selector when Logging into ClinicalConnect

You are prompted with the UAO Selector if you are authorized to access ClinicalConnect under the authority of multiple organizations.

Select the organization and click **Select**.



Once logged into ClinicalConnect the name of the organization you selected is displayed below you name in the toolbar.

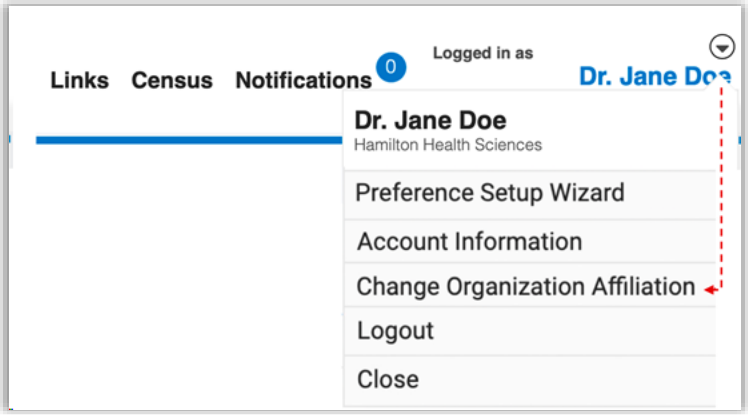


UAO Selector Once Logged into ClinicalConnect

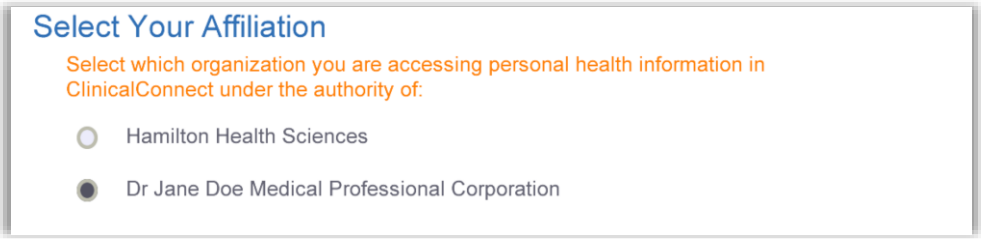
If you are authorized to access PHI under the authority of multiple organizations, use the UAO Selector to change your organization without having to log out of ClinicalConnect.

To change your organization:

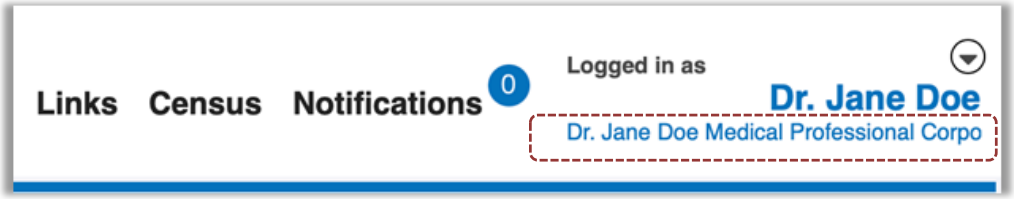
1. Click your name in in the toolbar to open the user menu.
2. Click **Change Organization Affiliation**.



3. From the Change Organization Affiliation window, use the UAO selector to select another organization and click the **Select** button.



The name of the organization you selected is updated in the toolbar below you name.



Notifications

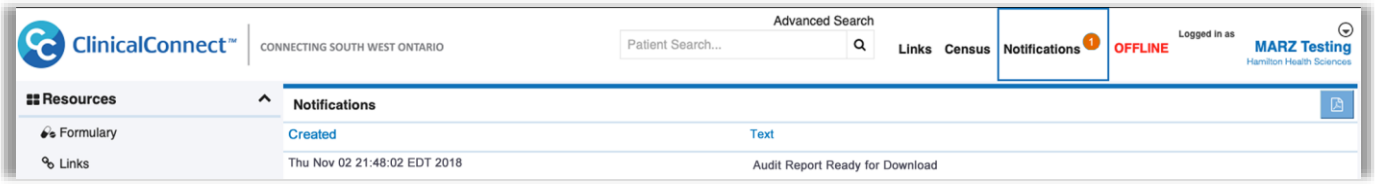
Ask a Question

The Notifications feature is a quick alert that displays a number in the banner. The notification function may be associated with specific user privileges in ClinicalConnect.

To view the details of the notification, click the **Notifications** option in the top toolbar.

In this example, there is an unread notification alert. Once the notifications are viewed, the alert is re-set back to zero.

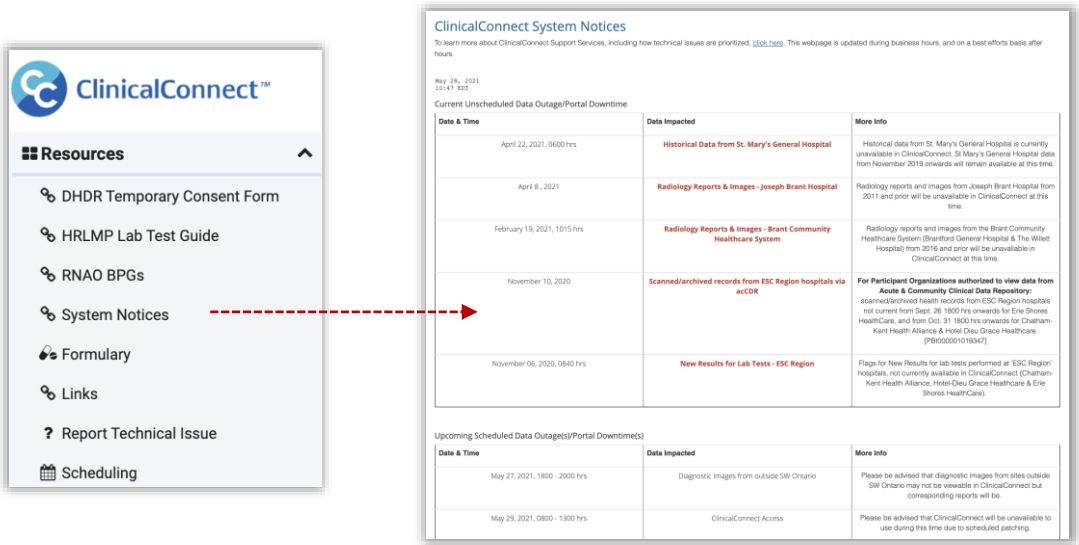
This is **NOT** related to the Notification Subscriptions of New Results functions as described in more detail later in this guide.



System Notices

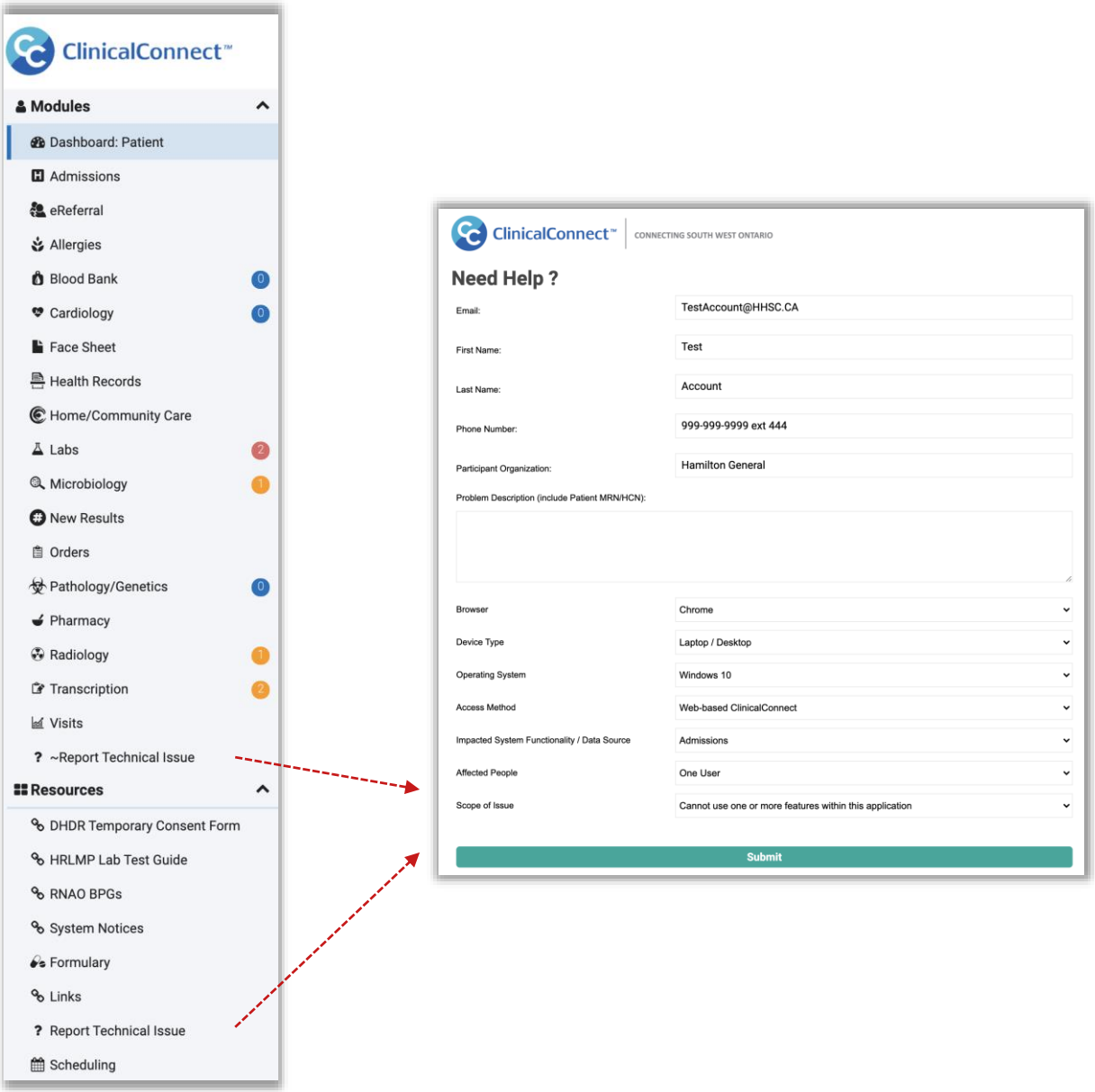
Clicking 'System Notices', located in the Resources menu, provides information on current unscheduled data outage/portal downtimes, upcoming scheduled data outage(s)/portal downtimes and ClinicalConnect features/functionality updates.

To access the System Notices, click to expand the Resources menu, then click System Notices.



Report a Technical Issue

ClinicalConnect offers users the ability to report a technical issue directly from within the portal. Select "Report a Technical Issue" link from the Module view or from the Resources. A web-based form will display with the user's name, and participant organization pre-populated and if submitted, the issue will be logged with the HITS Helpdesk.



Simple Search

Show Me

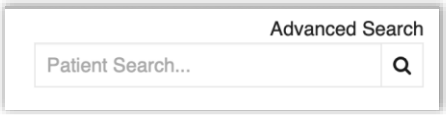
Ask a Question

The **Simple Search** is a broad patient search that displays data from all source systems contributing - patient information into ClinicalConnect. The Simple Search field is conveniently located in the top banner.

The most efficient search method is to use the patient's **Health Card Number (HCN)** which will return an exact patient match for the patient you are looking for since the HCN is the patient's unique identifier. For patients without an HCN, you can search by using their hospital **Medical Record Number (MRN),** Home and Community Care **(HCC) Client Number** or by the patient's **Name** (Last name and at least one first letter of the first name). For more search method details please refer to the **Simple Search Options** section below.

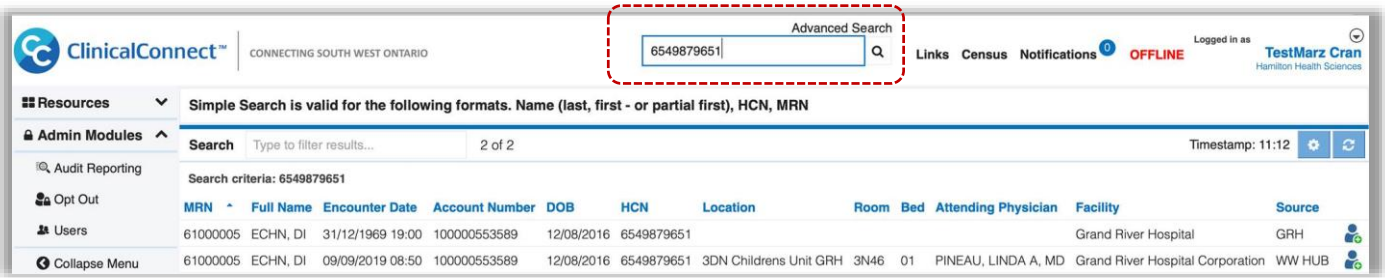
Note: Searching by the patient's name is not available for Hamilton Health Sciences patient records. Please use the HCN or MRN search option instead.

To search for a patient's record using the Simple Search:



1. Enter the patient's information in the **Patient Search** text box.
2. Press **Enter** or click the Search icon to begin the search.

Patient records matching the search criteria display in the **Search Results** list as shown below.



Simple Search Options

The table below describes the various search criteria that can be used in the Simple Search when searching for your patient's record:

Search Criteria	Description
Health Card Number	**This is the fastest and most efficient search method.** A simple search may also be performed by using the patient's Health Card Number (HCN), making sure you don't include the version code. 6549879651 The maximum character length is set at 10 for HCN searches. If the number length is exceeded in error, you will be prompted to correct your search and try again.
Medical Record Number	The patient's Medical Record Number (MRN) from a hospital encounter can also be used in the Simple Search. The maximum length for this type of search is 15 characters. If the number length is exceeded in error, you will be prompted to correct your search and try again.
Home and Community Care Client Number	If searching for a Home and Community Care client, the HCC client number can be used.
Patient Name	The format used when searching by name is **Last Name, First Name** (example: Doe, John) separated by a comma, or a portion of the patient's name (example: Doe, Jo). A patient's maiden name or other names are also considered in the search and may appear in the results if applicable. Last name, first name search Search criteria: marx,groucho First name, last name search – to search for a patient using this format, separate the first and last name with a space Search criteria: groucho marx

ClinicalConnect's Integration with Provincial Client Registry (PCR)

The following applies to ClinicalConnect users at Participant Organizations authorized to view data from OLIS or other provincial repositories.

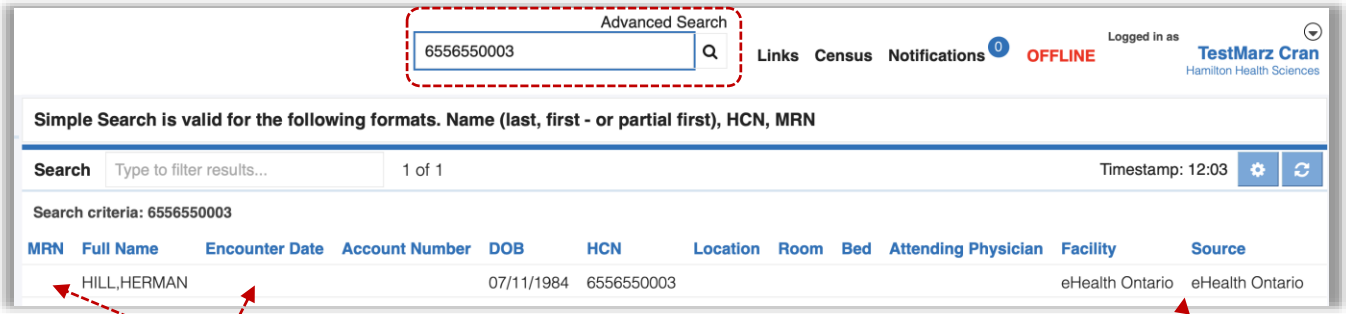
ClinicalConnect users now have access to an increased number of patient records from across Ontario as a result of the integration with Ontario Health's Provincial Client Registry (PCR). The PCR is the authoritative source for patient demographics and identifiers supporting electronic health records (EHRs) in Ontario.

To date, only records of patients who have had at least one visit to an acute care facility or Home & Community Care (HCC) Service in south west Ontario (SWO), have data that can be viewed using ClinicalConnect. ClinicalConnect's integration with PCR for Participant Organizations allows records of patients who haven't had a SWO hospital/HCC visit to be viewable because ClinicalConnect is 'matching' the patient's demographics and identifiers against records held in the PCR. This includes being able to view data from provincially-managed repositories assuming requisite agreements are in place between the ClinicalConnect user's organization and Ontario Health.

This may be helpful for care providers who provide virtual care services (i.e. eConsult or eVisits) to patients from across Ontario and need to access the patient's record, even if the patient hasn't had an acute care/HCC visit in south west Ontario.

Simple Search for PCR Records

1. To ensure the search results include all patients, not just those who have had visits to SWO hospitals/HCC, when using the **Simple Search** as described above, you must search by **Health Card Number (HCN).** The example below shows a patient's record search matching the patient's demographics and identifiers against records held in the PCR.

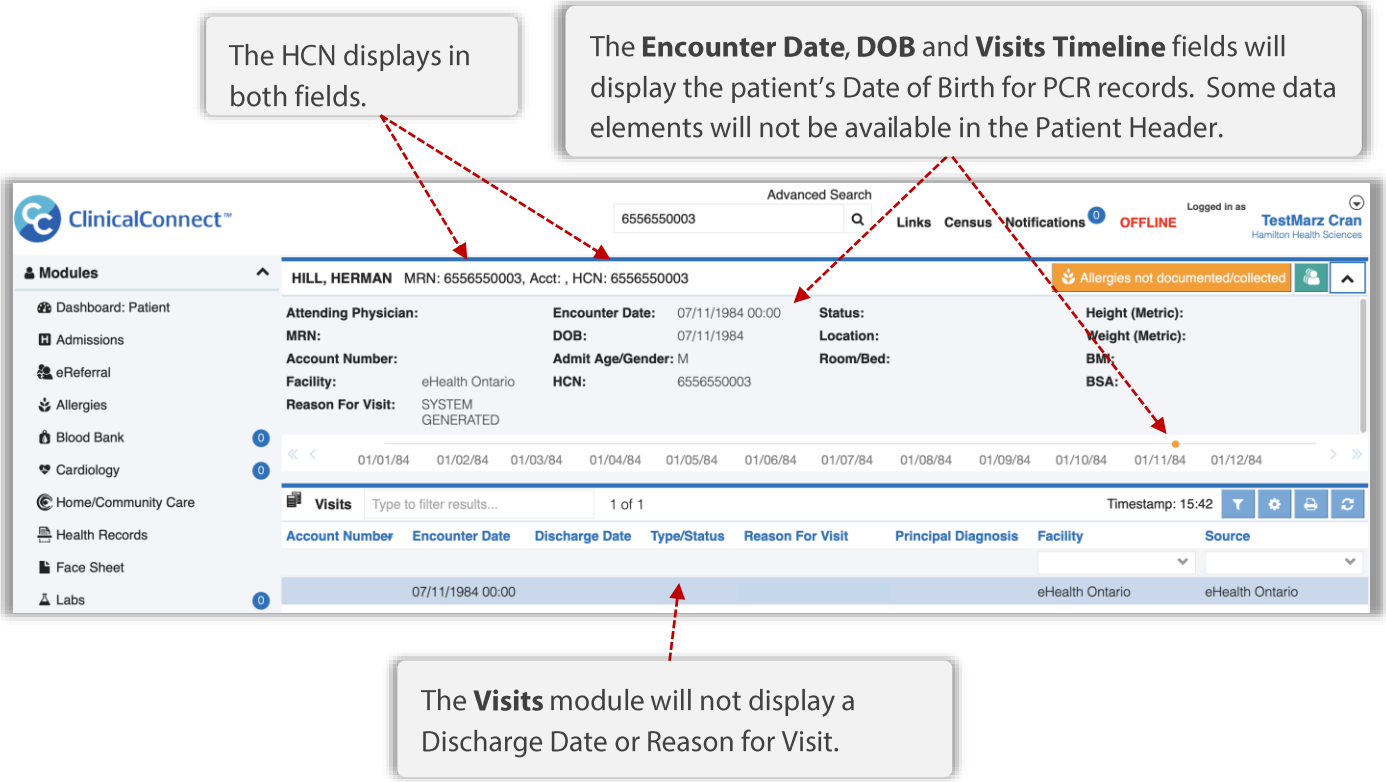


The MRN and Encounter Date details will not be available when being matched against the PCR.

Patient records viewable due to the PCR integration (no SWO hospital/HCC visit) will display eHealth Ontario in the Facility/Source columns and cannot be added to Census List or Worklist (i.e. will not display the "Add Pt to Worklist" icon). **These patients' records will need to be searched each time they need to be viewed using the HCN.**

This patient has not had any visits to an acute care facility or HCC Service in south west Ontario, however may have data in their health record from other sources.

2. Select the patient's record to view the details.
3. After selecting the patient's record from the search results, the example below shows how a patient's record displays, when the patient has not had any visits to an acute care facility or HCC Service in south west Ontario, however may have data in their health record from other sources. Take note of the key features below.



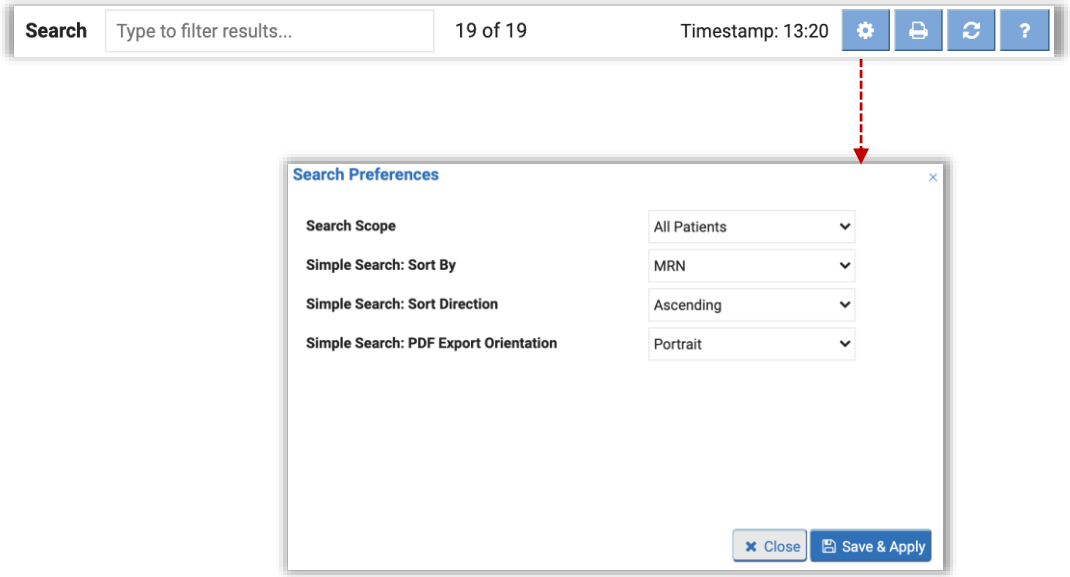
If the patient has not had a SWO hospital/HCC visit, and their health records are only available to view in ClinicalConnect because they've been matched against the PCR, data will not display for them in the following modules: Allergies, Admissions, Face Sheet, Orders and Census Lists.

Simple Search Preferences

Preferences are used to customize how you want to view information presented in your search results to suit your clinical viewing needs. Preferences need to only be set once and can be easily updated anytime as your clinical needs change.

Simple Search results have their own set of preferences that can be accessed and configured by clicking the Preferences button in the Search header as shown below or through the Preference Setup Wizard.

The **Search Scope** preference option will always default to "All Patients" and cannot be changed.



After updating your preference settings, click the **Save & Apply** button to save your changes.

To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

Advanced Search

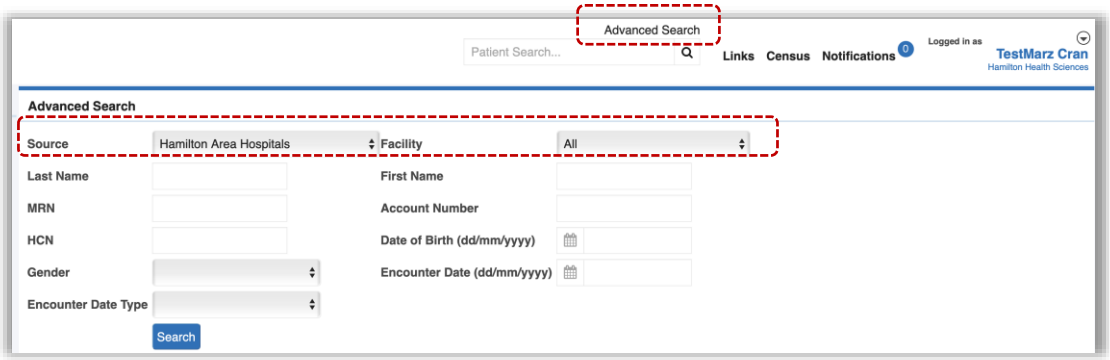
Show Me

Ask a Question

The **Advanced Search** is used to narrow down the patient search results and returns results much quicker by using a combination of unique patient identifiers and requires mandatory fields such as the **Source** and the **Facility**. This is helpful when searching for a patient who has a common name but may not have an HCN.

To search for a patient's record using the Advanced Search:

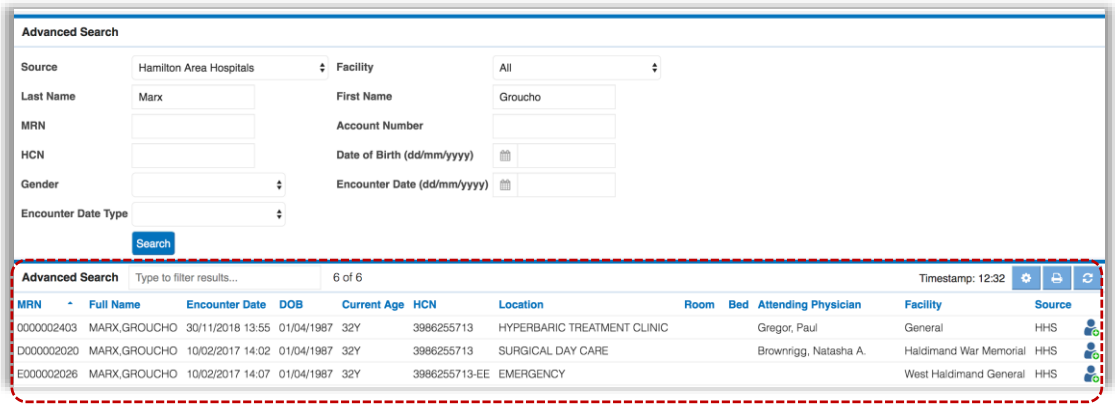
1. Click the **Advanced Search** option located in the toolbar at the top of the screen.



2. Using the text boxes, drop downs, and calendar options, enter the patient's search criteria then click the **Search** button.

3. The search results display in a list below the Advanced Search criteria.
   To access the patient's record, click the patient information row.

   If there are no results returned when doing an Advanced Search, this may indicate that one or more of the search fields contains incorrect information, and you should check the search criteria entered before searching again. Also take note of your **Source** and **Facility** selection.



Advance Search for PCR Records

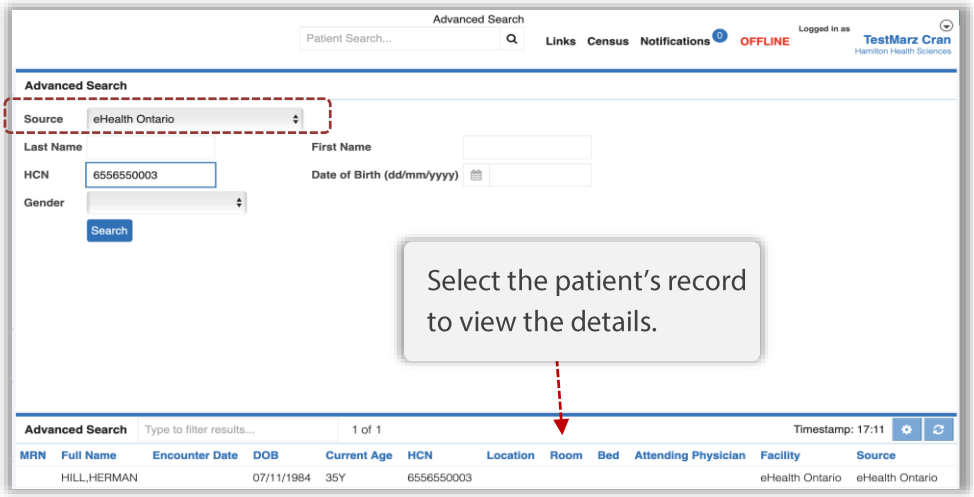
The following applies to ClinicalConnect users at Participant Organizations authorized to view data from OLIS or other provincial repositories.

The **Advanced Search** function can be used by Participant Organizations to search for records of patients who haven't had a SWO hospital/HCC visit because ClinicalConnect is 'matching' the patient's demographics and identifiers against records held in the PCR. Please refer to the previous section called 'ClinicalConnect's Integration with Provincial Client Registry (PCR)'

1. Using **Advanced Search;** First, select the **Source 'eHealth Ontario'** then
2. You must either enter the **HCN** or a combination of **Last Name, First Name and DOB.**

   The example below shows a patient's record search matching the patient's demographics and identifiers against records held in the PCR. This patient has not had any visits to an acute care facility or HCC Service in south west Ontario, however may have data in their health record from other sources.

3. Select the patient's record to view the details.



When using the Advanced Search, keep in mind the following Advanced Search options and restrictions:

Search Option	Description
Source and Facility	**These are mandatory fields.** The **Source** list includes hospitals and Home and Community Care that can have several associated facilities. Once you've selected the **Source**, use the **Facilities** list to drill down on a specific facility you want to use in your search. The **All** option is available in the Facilities dropdown to search through all facilities in the selected source hospital.

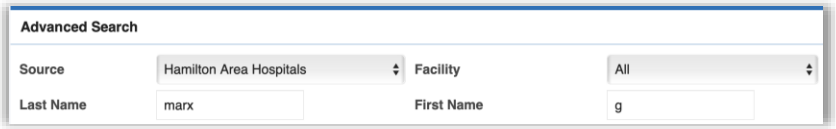
The table below shows the Source and Facility fields for Oncology data from HNHB Regional Oncology Centres. To learn more about the data contributing organizations, refer to the ClinicalConnect Data Integration Chart.

Oncology Data from HNHB Regional Oncology Centres	ClinicalConnect "Source" Field	ClinicalConnect "Facility" Field
Walker Family Cancer Centre (WFCC) Data (Niagara Health), including historical	WFCC	St. Catharines Site
HNHB hospital oncology data (Juravinski Cancer Centre, and outpatient cancer clinics at Joseph Brant Hospital and Brant Community Healthcare System)	HHSC	JCC Juravinski Hospital Joseph Brant Hospital Brant Community Healthcare System
Historical HNHB hospital oncology data from before June 4, 2022	HNHB Regional Cancer Program	JCC

Last Name and First Name

When using the first and last name search option, keep in mind the following: Requires at least one character in the Last Name field.

A patient's maiden name or other name(s) are also considered in the search and may appear in the results if applicable.



Search results may not always match the name entered in the first and last name fields. For example: If Mary Smith (the patient's maiden name) was entered, Mary Jones (the patient's current name) will be displayed in the results.

Note: Last Name, First Name, and DOB are required for HHSC patient name search.

Medical Record Number (MRN)

The maximum length for an MRN search is 15 characters.

Account Number

Account numbers are typically assigned to acute care encounters and are different for each individual patient encounter. Account numbers can be used to narrow down the search to a specific patient encounter at the selected facility.

Health Card Number (HCN)

The maximum length for an HCN search is 10 characters.

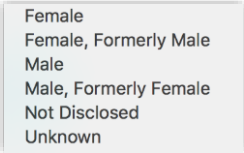
Encounter Date

The Encounter Date can be entered if you are sure you know the specific date the patient visit occurred in the acute care facility. Encounters dates may not be used across all contributing source systems.

Date of Birth

Enter the Date of Birth using the dd/mm/yyyy format.

Gender



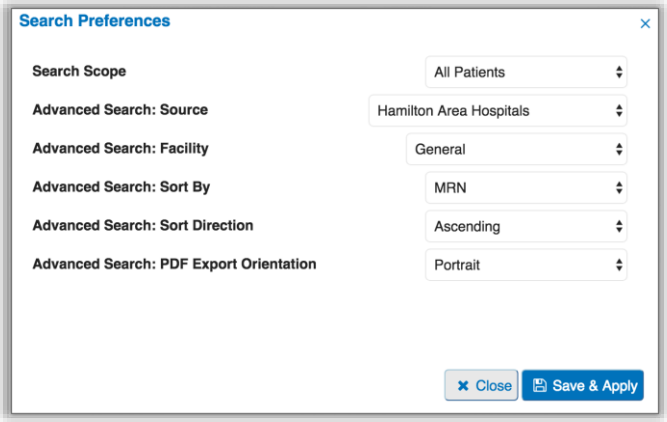
The gender field can be used along with other search criteria such as the name fields to narrow down the search results.

Encounter Date Type	You can include the type of patient encounter to narrow down your results. Encounter filters include: **Admit** (patient currently admitted into an acute care bed) **ER** (Emergency Department visits) **Service** (Service provided) **Discharge** (patient is discharged from acute care)

Advanced Search Preferences

Preferences are used to customize how you want to view information presented in the **Advanced Search** to suit your clinical viewing needs. Preferences only need to be set once, and can be easily updated anytime as your clinical needs change.

The Advanced Search has its own set of preferences that can be accessed and configured by clicking the Preferences button in the Advanced Search Results header (after you've completed an Advanced Search).



After updating your preference settings, click the **Save & Apply** button to save your changes.

To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

The following table provides a summary of some available Search preference settings:

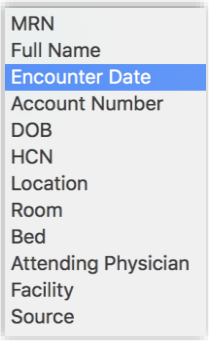
Search Option	Description
Search Scope	The Search scope preference option will always default to "All Patients" and cannot be changed.

Source and Facility

The Source dropdown list includes multiple hospitals that can have several associated facilities. After you select a Source, use the Facilities dropdown list to drill down on a specific facility you want to use to filter your census list.

The All option is available in the Facilities dropdown to search through all facilities in the selected source hospital.

Sort By



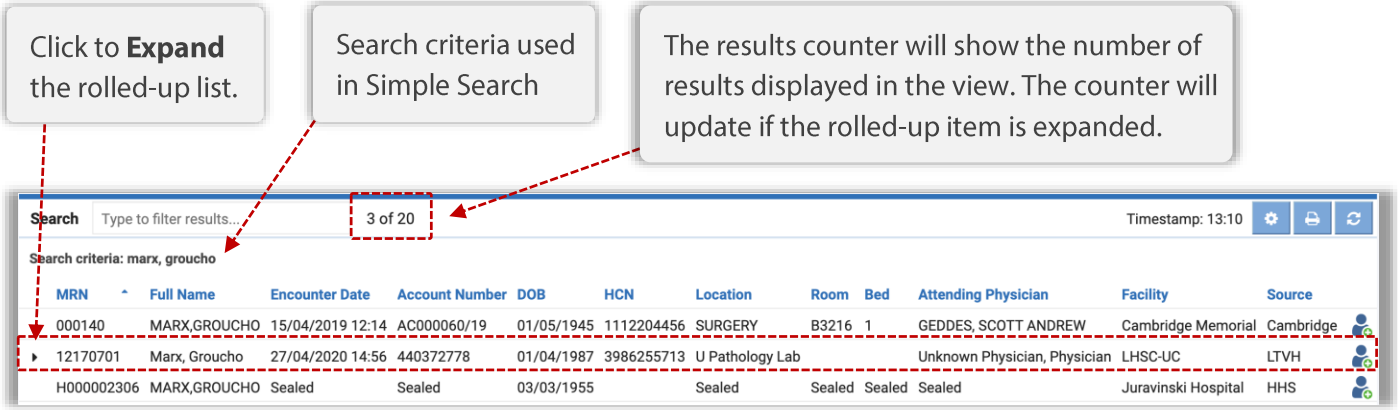
Customize which column you would prefer your search results to be sorted by.

Patient Search Results

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.

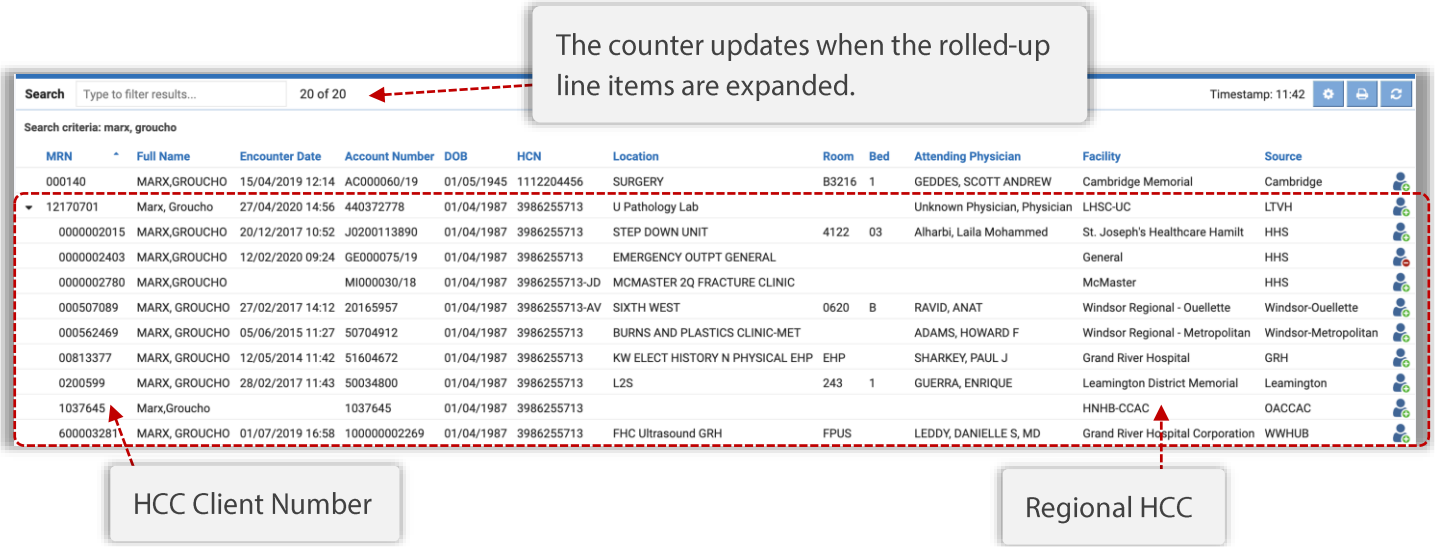
Selecting any patient's encounter from the rolled-up or expanded search results, will display the integrated record for that patient from all contributing sources that are included in the rolled-up list (based on your default user preference filters). Users do not have to select each individual encounter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

To expand the rolled-up list and view all matching records for the patient, click the Expand ▶ icon to the left of the patient's line item.



In the example above, there are three result items related to the name search Marx, Groucho however two of the line items do not match the patient's HCN or the DOB and are considered as separate patient records. In addition, if a patient's record presents as sealed or confidential, it will not be rolled up and will be displayed separately as shown above.

Once expanded, the patient's encounters from various source facilities will display in the list. When viewing the patient's encounters, take note of the **Facility** and **Source** columns as they are not a part of the roll up criteria but may be helpful to see the patient's previous encounters.



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
6000032811	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

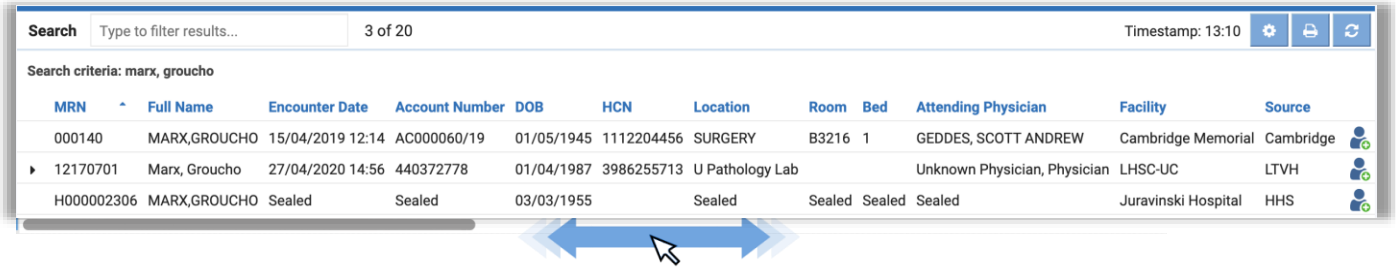
Home and Community Care Encounters

The patient search results also include any Home and Community Care (HCC) encounters and display with the specific regional HCC in the facility column with the Ontario Association of Community Care Access Centres (OACCAC) in the source field as shown above. If the patient has HCC services from across all four regions, each encounter will be identified in the facility field.

For HCC patients, the Client Number can also be used in the Simple Search.

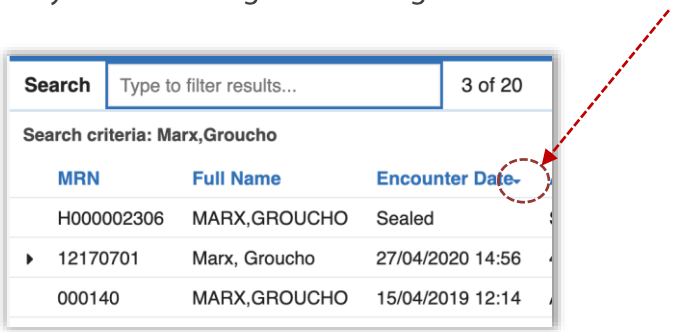
Scrolling for More Information

The search results view has several columns of important patient information and depending on the size of your display, it may require you to scroll to the right to see additional columns of data.



Sorting Search Results

Search results can be sorted by any of the available information columns displayed in the view. By default, the search sort order is set up to display the most recent patient encounter in your search results and this will be indicated by the ascending/descending sort arrow beside the column title.



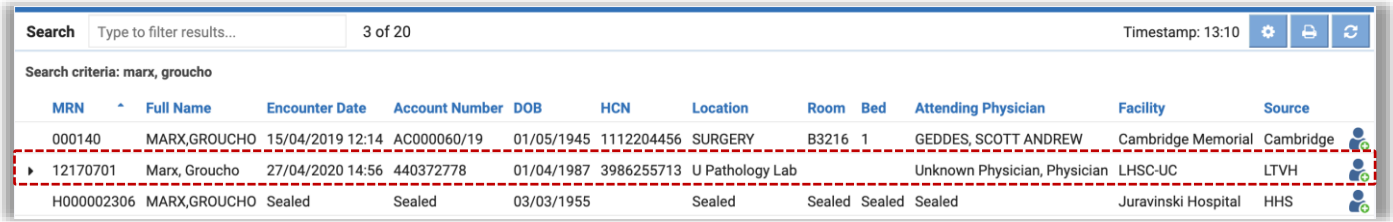
Clicking a column title once will sort the results in ascending order. Clicking the same column title a second time will sort the results in descending order.

Example: To sort search results by encounter date click the **Encounter Date** column header. This will order the search results by the date the patient encounter occurred, starting with the oldest encounter (ascending order). To display the most recent encounter, click the **Encounter Date** column header again to sort the search results most recent encounter (descending order).

You can change your search list sort order preferences default if needed by using the preference icon to set your search list defaults.

Accessing the Patient's Record

To access the patient's record from the search results, click the record you want to view from the search results list.



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

The **Visits** module displays all patient encounters from all hospital sources and facilities, including future visits if available from the source systems and can be helpful when reviewing the patient's visit history. The **Visits** module can be accessed from the Clinical Modules menu.

Smart Filter

Show Me

Ask a Question

The Smart Filter is a text-based filtering tool that allows you to filter results by any keyword, partial word, number, or date displayed in the view. A Smart Filter search hides rows from the results screen that do not match the leading characters entered in the Smart Filter box. This is useful if you need to narrow down your results to view specific data. The Smart Filter searches the entire grid to find any data that has the leading characters entered into the search then , displays data that starts with those leading characters. The Smart filter also allows for the use of AND/OR conditions allowing for the combination of terms to be searched. This is described in more detail below.

Example: To narrow down the search results to display only items from the HHS can be done by typing **HHS** in the **Smart Search** box. Only rows that have the leading characters 'HHS' are displayed. Any row not containing HHS is filtered.

The Smart Filter feature is available in multiple modules and census lists. Clearing the data from the Smart Filter box will display all previously filtered results.

MRN	Full Name	Encounter Date	Account Number	DOB	HCN	Location	Room	Bed	Attending Physician	Facility	Source
E000002026	MARX,GROUCHO	10/02/2017 14:07	EE000001/17	01/04/1987	3986255713-EE	EMERGENCY				West Haldimand General	HHS
0000002403	MARX,GROUCHO	30/11/2018 13:55	GZ000022/18	01/04/1987	3986255713	HYPERBARIC TREATMENT CLINIC			Gregor, Paul	General	HHS
H000002306	MARX,GROUCHO	29/08/2016 11:50	HA005036/15	03/03/1955		CICU-CARDIAC & INTENSIVE CARE	C1-139	2	Ho, Edward Siu-Sun	Juravinski Hospital	HHS
M000002786	MARX,GROUCHO	17/08/2018 00:00	MI000030/18	01/04/1987	3986255713-JD	MCMASTER 2Q FRACTURE CLINIC			Missiuna, Paul Cesar	McMaster	HHS
M000002111	MARX,GROUCHO	25/01/2019 00:00	MI000096/18	01/04/1987	3986255713	Adult Ambulatory Dermatology			Lima Filho, Jose Hermenio C	McMaster	HHS
D000002020	MARX,GROUCHO	10/02/2017 14:02	QS000001/17	01/04/1987	3986255713	SURGICAL DAY CARE			Brownrigg, Natasha A.	Haldimand War Memorial	HHS

Conditional Smart Filter

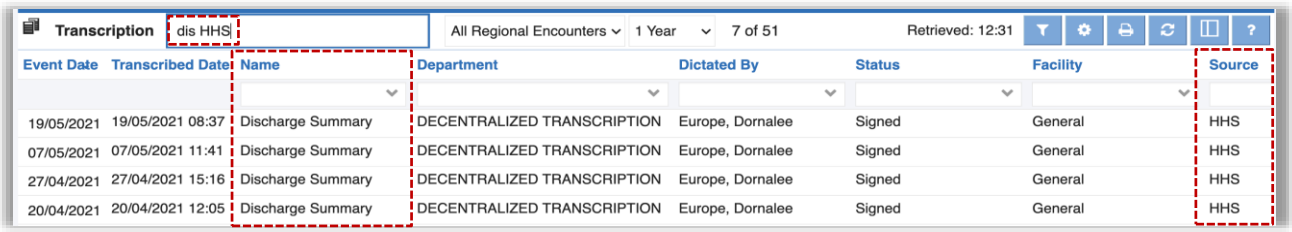
Conditional filter terms are a great tool you can use when using the smart filter. These are also known as AND/OR conditions.

AND Condition

The AND condition is used if you want to only show rows of results that include two or more specific keywords or partial words. To use this condition, simply use a space to separate each keyword you want to include in your results.

Example: If you are looking for *discharge summaries* from any site at *Hamilton Health Sciences (HHS)*, you could type **dis** *(space)* **HHS** in the Smart Filter Search box.

Transcriptions that only include text with both *dis* and *hhs* are displayed.

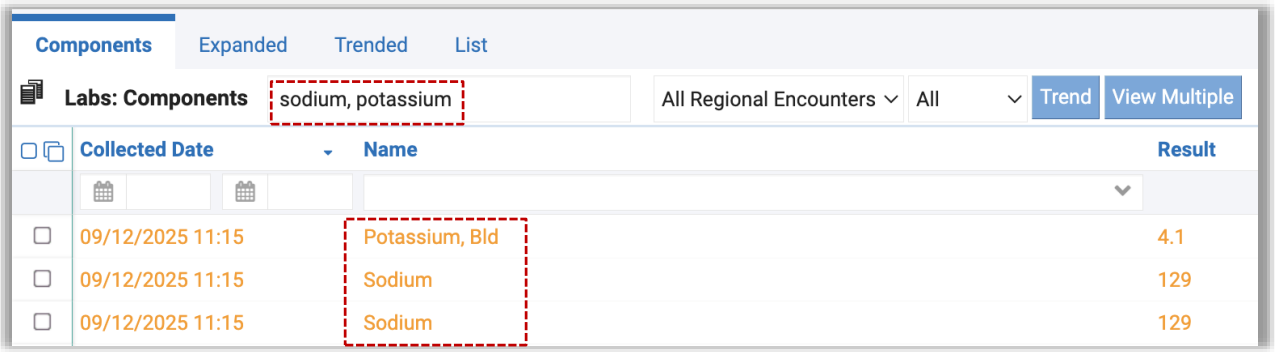


OR Condition

The OR condition is used to display rows that include one or more keywords by simply using a comma to separate each keyword (or partial word) you want included in the filter.

Example: If you want to filter to You want to view your patient's results for all sodium or potassium labs. To locate these labs you would type **sodium, potassium** in the Smart Filter Search box.

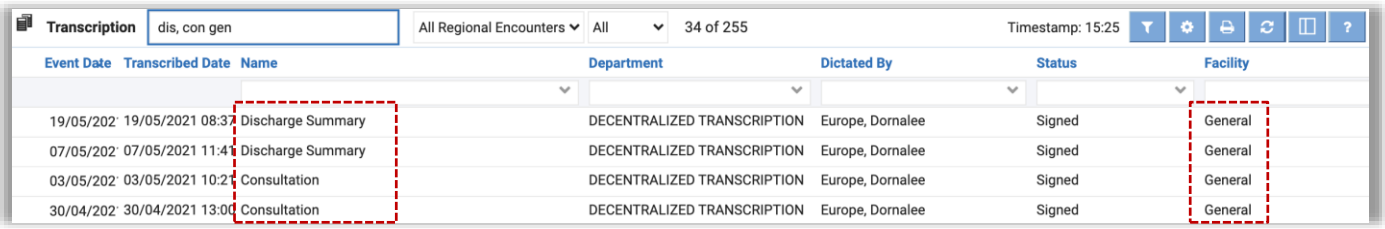
Only lab results that include potassium or sodium keywords are displayed.



Combining AND and OR conditions

You can combine AND and OR conditions in a single Smart Filter search.

For example; if you wanted to view just **consultation** and **discharge** transcriptions from the **General** facility, type **dis, con gen** in the Smart Filter box.



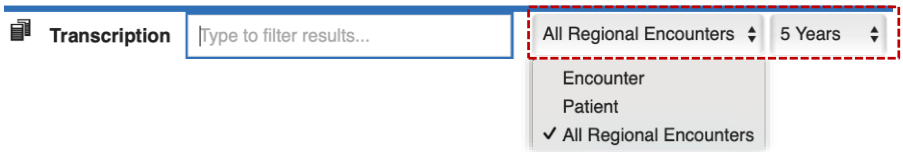
Transcriptions are filtered to only those that match the text entered in the Smart filter.

Combining the Smart Filter with Other Filters and Sorting Functions

The Smart Filter can be used on its own or in combination with other filter and sorting functions. Depending on the patient information that you are trying to filter and the module, you may find that the other sorting and filter functions may narrow down the results you are looking for without having to use the Smart Filter. It is up to you to determine which options will best meet your clinical needs.

The following are some suggested practices when using the Smart Filter with other sorting/filtering functions.

1. Set the **Encounters** filter to **All Regional Encounters.** This is typically the default setting for all applicable modules. **This filter ensures that all available** data from all hospital encounters and from provincial repositories (assuming your organization has been enabled to view such data) available in the portal is displayed in the module if available.



2. To narrow down the number of results displayed in the view, you can consider changing the **Days Back** filter to view a shorter duration.

   Example: If you are looking for a Transcription from the past week or two you could set the filter to 30 days to narrow down the amount of records displayed in the view.

3. **Sort by columns**

   Each column in your list view can be sorted in ascending or descending order. This example is showing the Transcription module columns.

Event Date	Transcribed Date	Name	Department	Dictated By	Status	Facility	Source
29/08/2017	29/08/2017 16:02	Social Work Note		Test, Doc (Physician)	Transcribed	LHSC-UC	LTVH
29/08/2017	29/08/2017 16:00	Clinic Report		Test, Doc (Physician)	Auth (Verified)	LHSC-UC	LTVH
02/08/2017	02/08/2017 14:44	Anesthesiology Pre-Op Asmt	HEALTH RECORDS/TRANSCRIPTION	THIBEAULT, SUSIE	Draft	General	HHS
21/06/2017	21/06/2017 11:09	WLMH Consultation	HEALTH RECORDS/TRANSCRIPTION	Cran, Marzena	Draft	West Lincoln Memorial	HHS

Sort by Date

Results that contain a date field (such as **Date or Event Date**) can be sorted from newest to oldest (and oldest to newest) by simply click the column header containing date information. This sort preference can also be set in the module preferences, eliminating the need to click on the column header each time.

Sort by Name

Columns of data that contain the name of the result or record (such as Test or Name) can be sorted to group common results. Simply click the column header containing the information you want grouped. This makes it easy to go through your list view to find a specific result based on the name of the result.

Printing Filtered Results

You can print the filtered list view results by clicking the Print button after entering Smart Filter keywords.

See the Printing section of this guide for more information on how to print list and detail views.

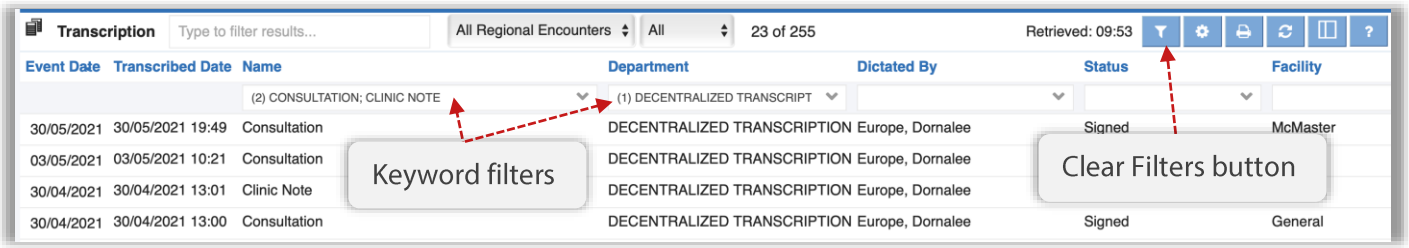
Column Filter

Show Me

Ask a Question

Column filters are available in most modules and can be used to filter data to narrow down the information presented in the module's list view.

The column filters are dependent on your **Encounter** and **Days Back** filters.



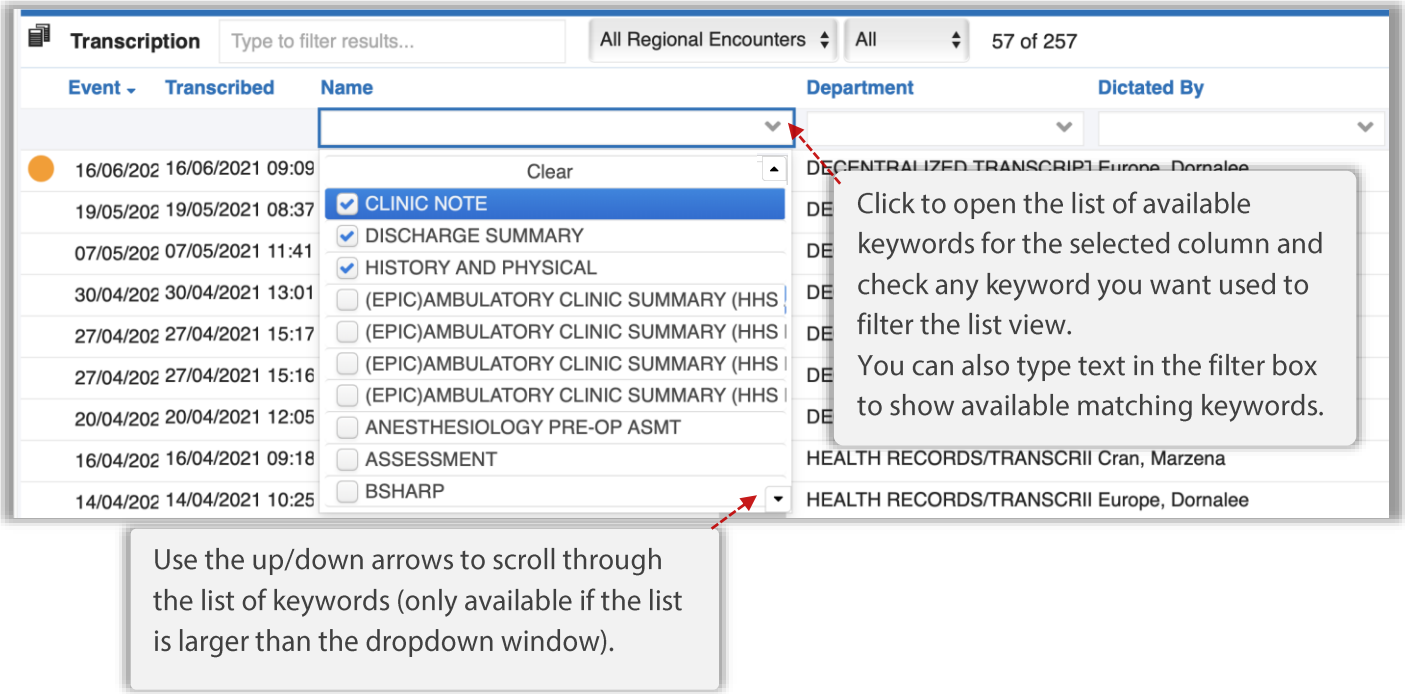
Filter by Column Keyword

Filtering a column of data by keyword(s) allows you to filter a list of module information (example: transcriptions or lab results) by the alphanumeric entries displayed in each column in the patient's record.

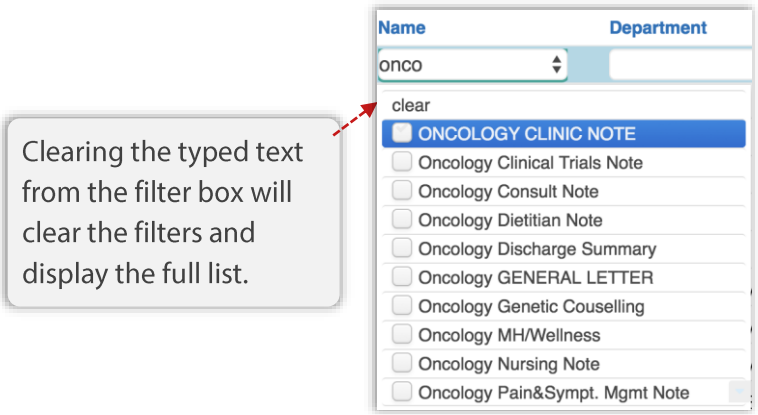
To filter a column of data by keyword:

1. Identify the column you need to use to filter your list. Columns that have keyword filter capabilities display an empty dropdown box under the column name as shown in the example below.
2. Click the dropdown arrows on the right side of the box to view a full list of available keywords for the selected column.
3. Click the checkbox next to the words you want to use to filter the list.

   You can also type text into the filter box to show matching keywords.

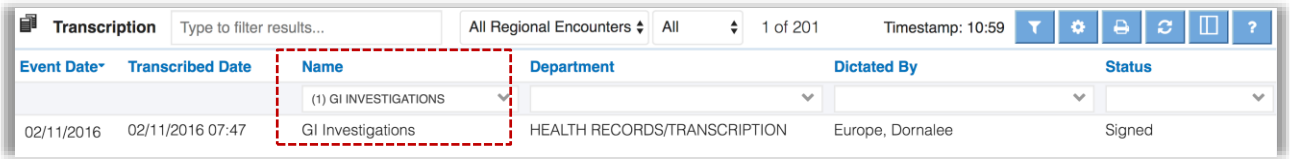


The following image shows an example of text typed in filter box to only show available keywords that begin with **onco** (for oncology-related keyword matches).



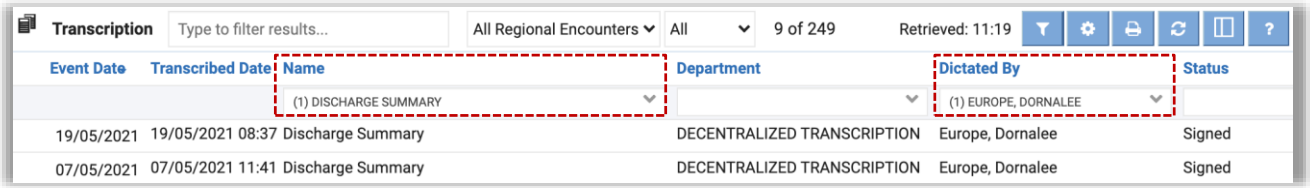
The list will update to reflect the selections made in the column filter.

Example: Selecting **GI Investigations** in the **Name** column filter of the Transcriptions module will result in a list of transcriptions that include **GI Investigations** in the **Name** column



4. You can select multiple keywords and multiple columns to filter your module list view.

   Example: If you wanted to see all discharge summaries from a specific doctor (Dr. Europe) in the Transcription module, you would select (check) **Discharge Summary** in the **Name** column filter and **Europe, Dornalee** in the **Dictated By** column filter.



Clearing Keyword Filters

There are a few ways clear keyword filters depending on your data viewing needs.

Resetting the Entire Module

Click the **Clear Filters** button in the module header to reset all filters in all columns. This will return the list view to display all rows based on your Encounters and Days Back settings.

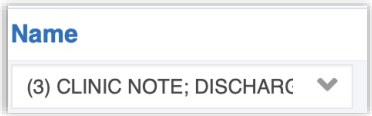
This option is best used when you want to start from the beginning and apply new column filters in the module. This is also the easiest option if you want to view the module with your pre-defined original default preferences.

Example: After applying a number of filters in the module columns, you'd like to start over with new filter settings. Click the '**Clear Filters'** button and reapply new filters.

Resetting an Entire Column

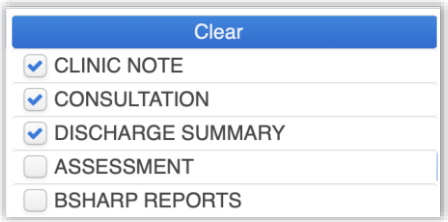
To reset (uncheck) all filters in a specific column:

1. Locate the column you want to reset then click the dropdown arrow on the right side of the filter box under the column header.



2. Click the **Clear** option at the top of the dropdown list. Your list view will update to reflect the changes to the column's filter. This option is helpful if you want to make changes to the keyword selections for just one column.

To remove individual keywords from your filter, uncheck the keyword you want to remove from the filter. This option is best if you want to make quick and simple changes to an existing filter selection.



Example: If you have 10 different transcription keywords selected in the **Name** column of the Transcription module and now you want to select just *Discharge Summaries*. It's easier to use the **Clear** option instead of individually unchecking all Oncology selections.

Printing Filtered Results

You can print the filtered list view results by clicking the Print button after entering your column filters.

See the Printing section of this guide for more information on how to print list and detail views.

Customizing Your Preferences

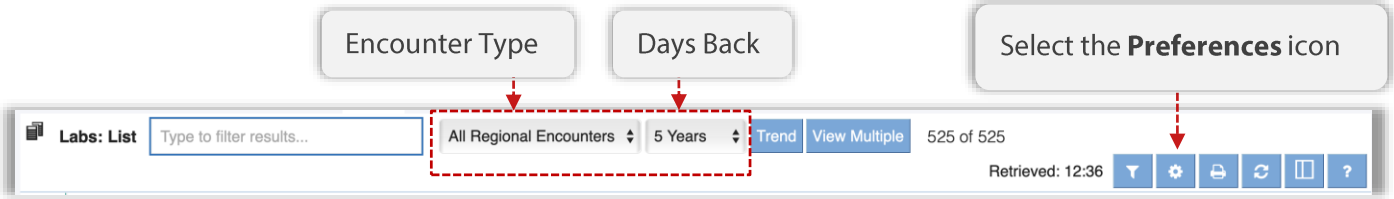
Show Me

Ask a Question

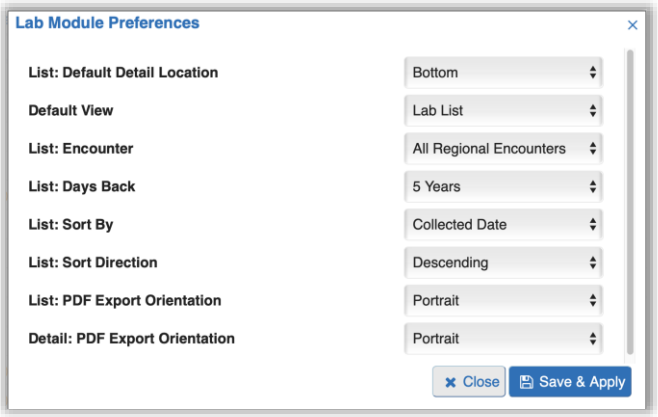
Module & Census Preferences

Setting up your personal preferences is essential to how you view information in ClinicalConnect. Due to the large volume of data that is queried from multiple facilities, it is important to configure your preference settings to ensure you're getting the results you need. The Preference Setup Wizard should be used to configure your ClinicalConnect preferences when accessing the portal on desktop and mobile devices, as well as when using the Patient Dashboard and allows users to customize different preference settings for each modality.

Another convenient way to customize your preferences is by clicking the Preferences icon from within each module, or Census list as shown in the example below. This icon can be accessed from any module or census list on desktop and mobile devices, as well as when using the Patient Dashboard.



Each Module or Census List will have preference setting options that align with the specific module/census and may vary based on the type of data and how that data is presented.
In this example, the preferences window displays options for the Lab List view.



After updating your preference settings, click the **Save & Apply** button to save your changes.

Common Preference Settings in ClinicalConnect

Each module and census lists have preference settings that can be accessed by using the Preference icon in the module or census header. Module preferences can also be modified using the Preference Setup Wizard.

The table below covers the various common census settings:

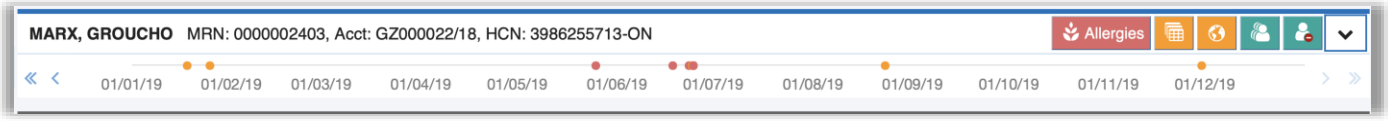
Preference Setting	Description
Default Detail Location	Allows you to set the default location of the Details window: • **Bottom** –Details are displayed below the results list. • **Right** – Details are displayed to the right of the results list.
Encounter and Days Back Filters	 It's very important that in each of the three modalities: • The **Encounter Filter** be set to "**All Regional Encounters**" (refer to Step 1 of the Setup Wizard) to ensure data from provincial repositories is viewable (assuming your organization has been enabled to view such data). • **Encounter** - Displays information only for the selected encounter or visit. • **Patient** - Displays data from all encounters for the selected source hospital system (which may have multiple facilities). The **Days Back Filter** should be set to an appropriate number of days (refer to Step 2 of the Setup Wizard). For desktop, mobile, and dashboard modalities, the Days back preference can be customized differently as needed. The Days Back filter is set to 180 days, as the default for most modules when viewing data on a desktop but can be changed. Make sure that your Days back is set appropriately to include the available data in that date range. Example: If you're looking for a result that was completed two weeks ago, and the Days Back is set to 7 days, then you will not be able to see that result.
Sort By	Allows you to set how you want your results to be sorted.

Preference Setting	Description
Sort Direction	After setting the Sort By column, you can select to sort the data in **Ascending** or **Descending** order. If the Sort By column selection is a date (numeric) field, selecting Descending order will display the most recent date at the top of the list. If the Sort By column selection is a character (A through Z) field such as the Full Name column, the Sort Direction will be in alphabetical order A to Z Ascending order, or Z to A in Descending order.
PDF Export Orientation for List and Details Views	**List: PDF Export Orientation** Portrait **Detail: PDF Export Orientation** Portrait Allows you to configure the PDF page orientation when exporting information from the list view or the details view. Options include Portrait or Landscape orientation.

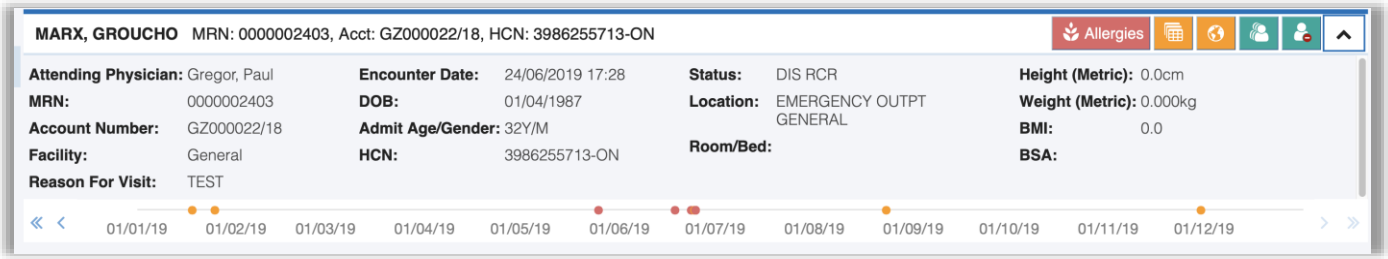
Setting Your Patient Header & Patient Visits Timeline Preferences

The **Patient Header** can be customized to display in the expanded or collapsed format. By default, the header is collapsed which allows for increased screen space. In both cases, the header can be temporarily expanded or collapsed by click the arrows .
To change the defaults from collapsed to expanded layout, please follow the steps below.

Example of a Collapsed Patient Header (default)

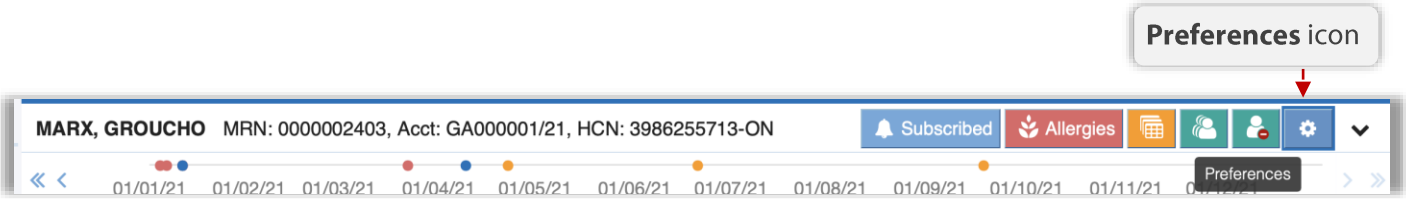


Example of an Expanded Patient Header



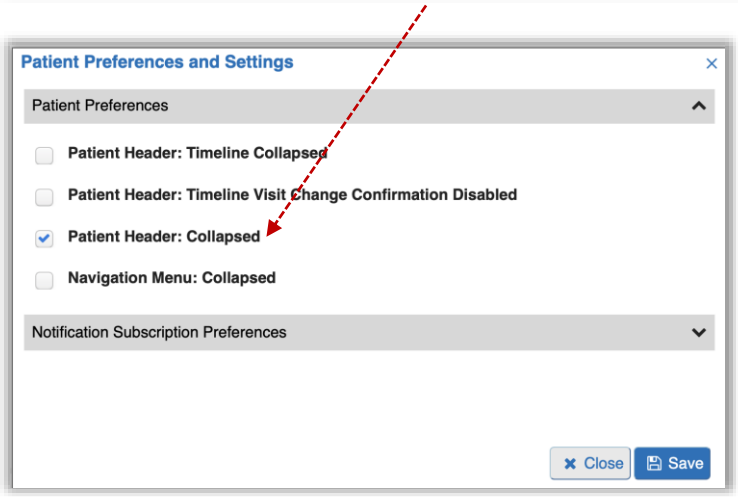
An easy way to set your preferences to expand or collapse the Patient Header, Patient Visits Timeline and Navigation Menu is to select the **Preferences** icon from the patient record header.

You can also use the Preference Setup Wizard and go to Patient and General Preferences: Step 9 of 9.



By default, the Patient Header is set to be collapse and will have that option already selected. Click the checkboxes to permanently collapse the Patient Header Timeline. You can also choose to collapse or disable any of the other options in this list.

It is recommended that the **Patient Header** setting be collapsed to allow for increased screen space when viewing information in the record.



Click the Save button at the bottom of the screen then log out of ClinicalConnect to apply your changes.

Preference Setup Wizard

Show Me Ask a Question

Setting up your personal preferences is essential to how you view information in ClinicalConnect. Due to the large volume of data that is queried from multiple facilities, it is important to configure your preference settings to ensure you're getting the results you need. ClinicalConnect provides a standard set of default preferences for new users when first accessing the portal however, you may want to customize these default preference settings to better align with your clinical needs. The new **Preference Setup Wizard** will guide you through how to set the values associated with how you prefer to view and retrieve data while using ClinicalConnect. The **Preference Setup Wizard** should be used to configure your ClinicalConnect preferences when accessing the portal on desktop and mobile devices, as well as when using the Patient Dashboard. Existing users will need to set and save their preferences using the Setup Wizard to ensure that their previously-selected default preferences remain the same as before for all three views as now each view has its own preference settings to choose from.

In addition, it's very important that in each of the three modalities:

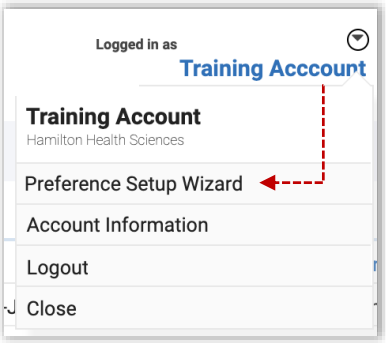
- The **Encounter Filter** be set to "**All Regional Encounters**" (Step 1 of the Setup Wizard) to ensure data from provincial repositories is viewable (assuming your organization has been enabled to view such data).
- The **Days Back Filter** should be set to an appropriate number of days (Step 2 of the Setup Wizard).
- Note that the Encounter and Days Back options should be set using the Preference Setup Wizard for the Patient Dashboard to ensure that the Dashboard modules display the desired amount of data. You can also set and save the module preferences in your Dashboard individually by using the preference icon.

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 this Wizard by clicking on your name in the top right corner of the screen and selecting '**Preference Setup Wizard'** as shown in the image below. Use the "**Go to Step**" button within the Wizard if you only need to update certain aspects of your preferences as opposed to going through the entire Setup Wizard. Always click **Save & Continue** for your preferences to take effect.

The **Preference Setup Wizard** will present automatically upon your first log in after August 15, 2020 or can be accessed anytime thereafter from the user menu, Preference Setup Wizard.

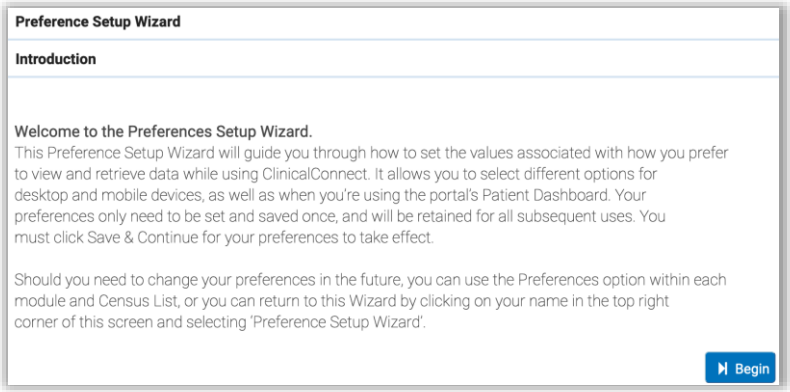
1. To access the Preference Setup Wizard, open the user menu by clicking your name in the top right toolbar.

2. Click **Preference Setup Wizard**



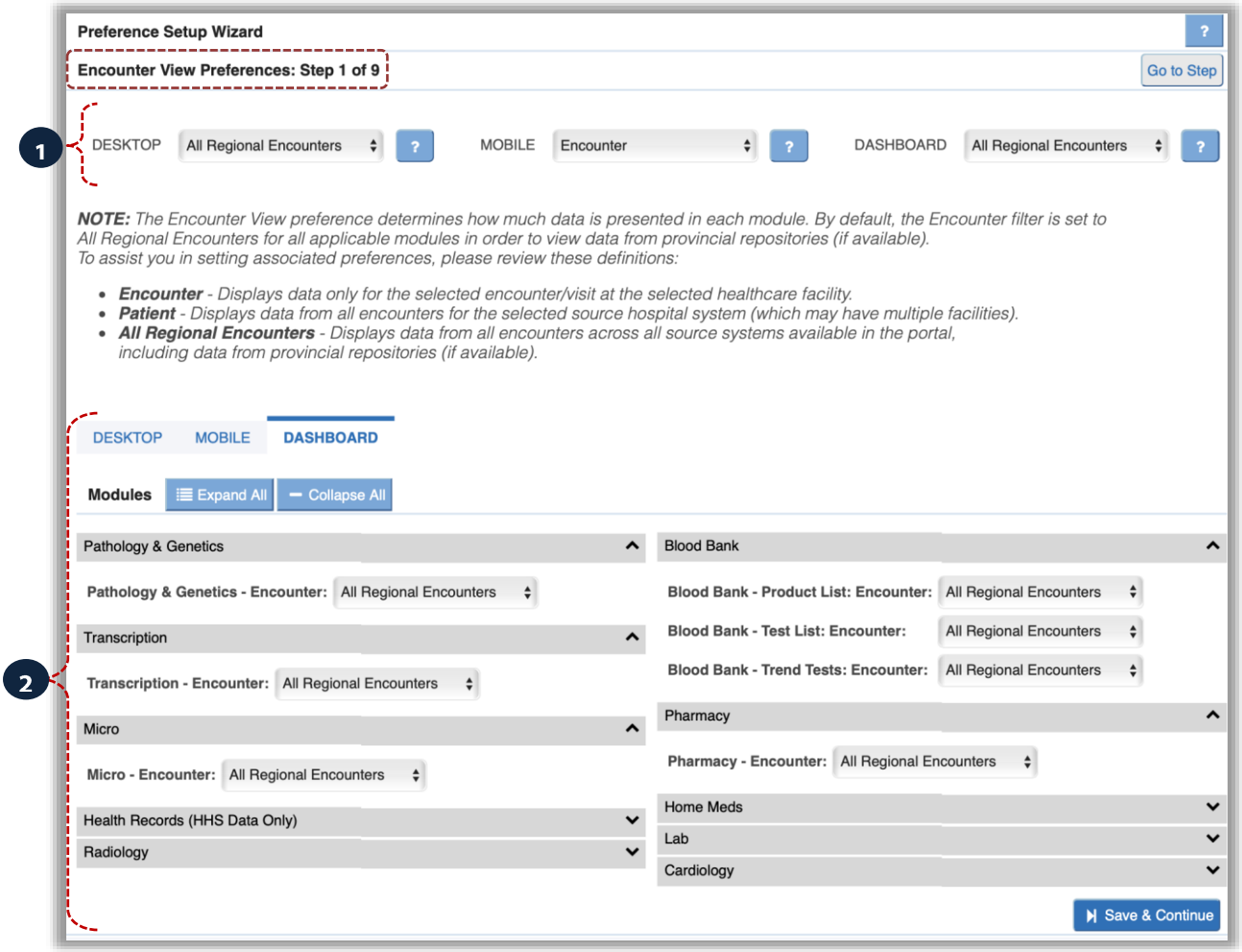
The Preference Setup Wizard will guide you through nine steps of the preference set up screens. After completing each step, you must click **Save & Continue** then once you're finished, ensure you log out of ClinicalConnect and the next time you log back in, your new preferences will take effect.

3. To start customizing your preferences, click the **Begin** button from the welcome screen.



Each step of the Preference Setup Wizard contains two sections that relate to Desktop, Mobile or Dashboard modalities.

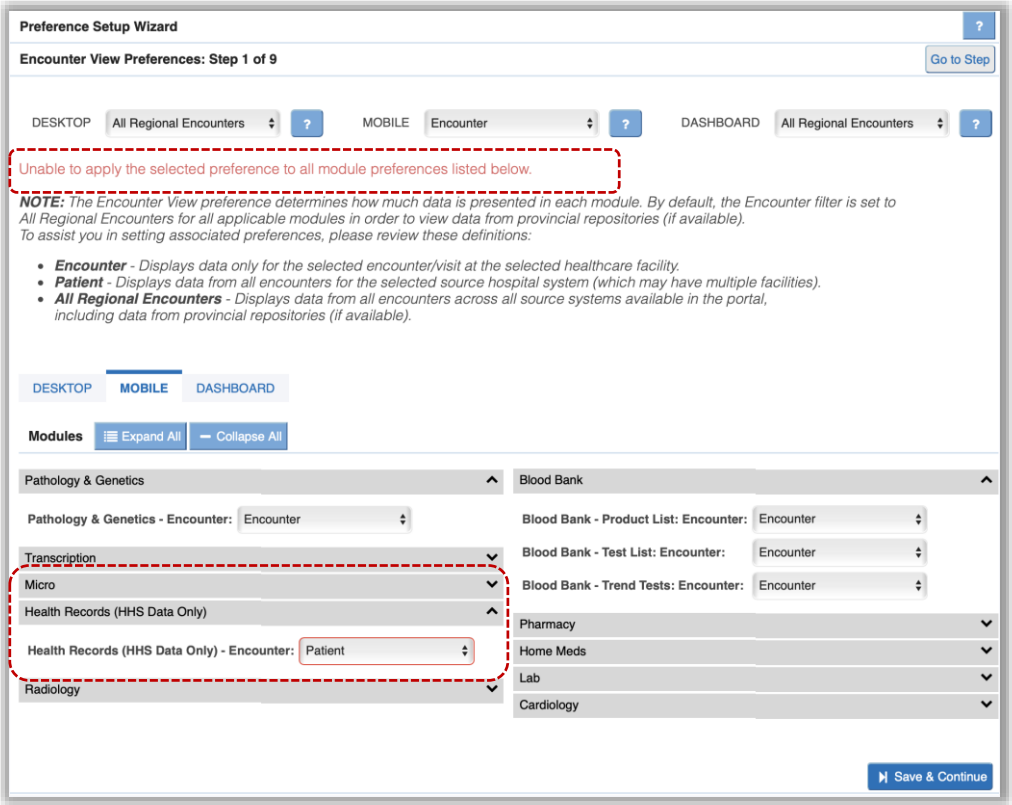
1. The top section of the Preference Setup Wizard allows you to apply the same preference settings to all applicable modules at once for Desktop, Mobile, or Dashboard by clicking the **Dropdown** ⌄ arrows for each heading.
2. The lower section of the screen allows you to further customize the module by selecting a specific Tab (i.e. Desktop, Mobile or Dashboard) first and then choosing the specific module(s) to customize for each tab. This may be used in cases where you may want to view data differently between Desktop, Mobile and the Dashboard.



Not all steps of the Preference Setup Wizard may apply to all three views (Desktop, Mobile, and Dashboard) as available options. In addition, the module preference options may not all be the same for all three modalities and in this case, you will receive this message:

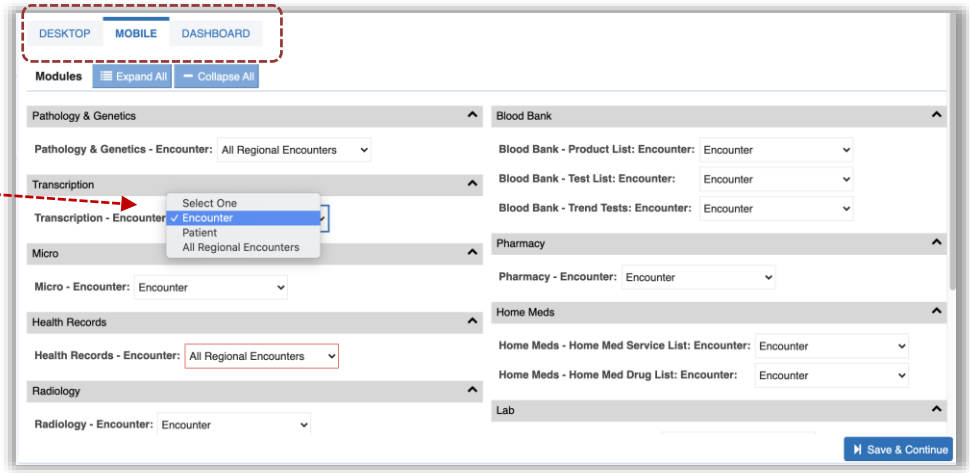
Unable to apply the selected preference to all module preferences listed below.

The modules that require you to select a different value will be highlighted in red. Using the drop downs, select a different value then click **Save & Continue**.



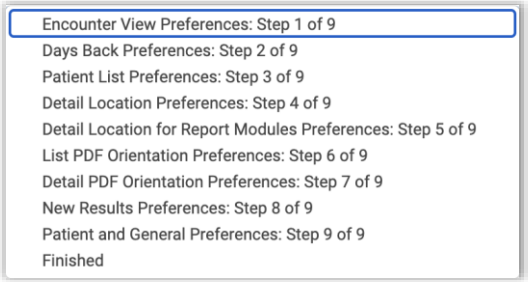
3. To apply individual preferences to each of the modalities, first click on the tab you wish to customize: **Desktop, Mobile,** or **Dashboard**.

You can change the preference settings for a specific module by clicking the arrow and selecting an option.



4. The modules and the preference options will display in an expanded view, clicking the **Collapse All** button [Collapse All] collapses the long list of preferences down to just the module titles, making it easier to find the preferences you want to update. Clicking the **Expand All** [Expand All] button will list the full view of all available modules and the preferences.
5. After completing your preference selections click [Save & Continue] to proceed onto the next step. If you would like to go back a step, click the **Back** [Back] button.

To go to a specific step in the Preference Setup Wizard, click the **Go to Step** [Go to Step] button in the top-right corner of your screen then select the desired step from the drop-down list.



Setting Up your Preferences Using the Setup Wizard

There are nine steps in the Preference Setup Wizard that are described in more detail below.

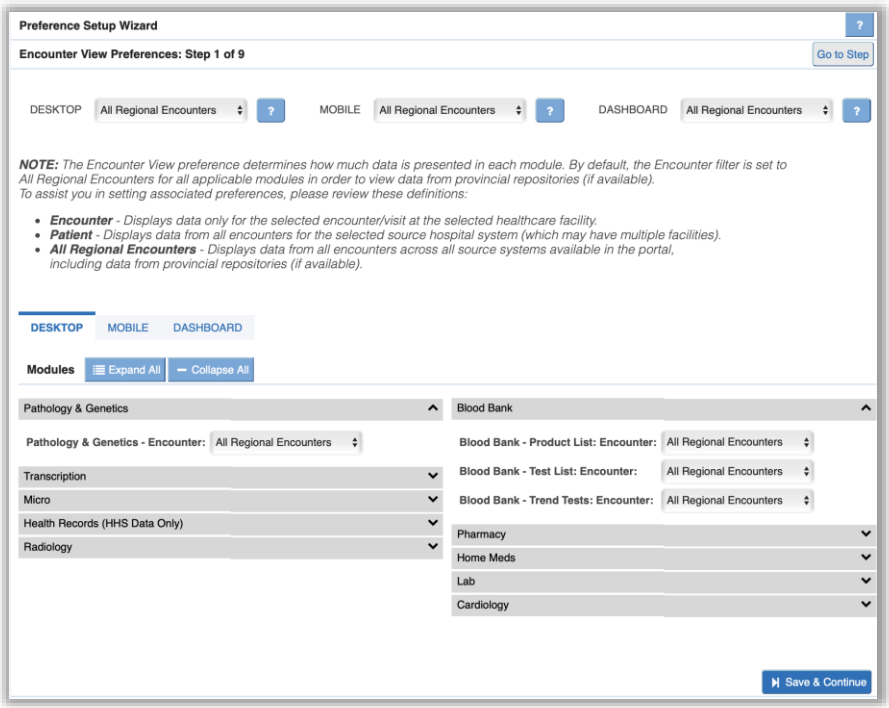
Step 1 - Encounter View Preferences

The **Encounter** preference determines how much data is presented in each module. By default, the Encounter filter is set to **All Regional Encounters** for all applicable modules when viewing data on a desktop, mobile device or from the Patient Dashboard to ensure data from provincial repositories is viewable (assuming your organization has been enabled to view such data). (if available).

The three Encounter preference options are:

- **Encounter** - Displays information only for the selected encounter/visit at the selected healthcare facility.
- **Patient** - Displays data from all encounters for the selected source hospital system (which may have multiple facilities).
- **All Regional Encounters** - Displays data from all encounters across all source systems available in the portal including data from provincial repositories (if available).

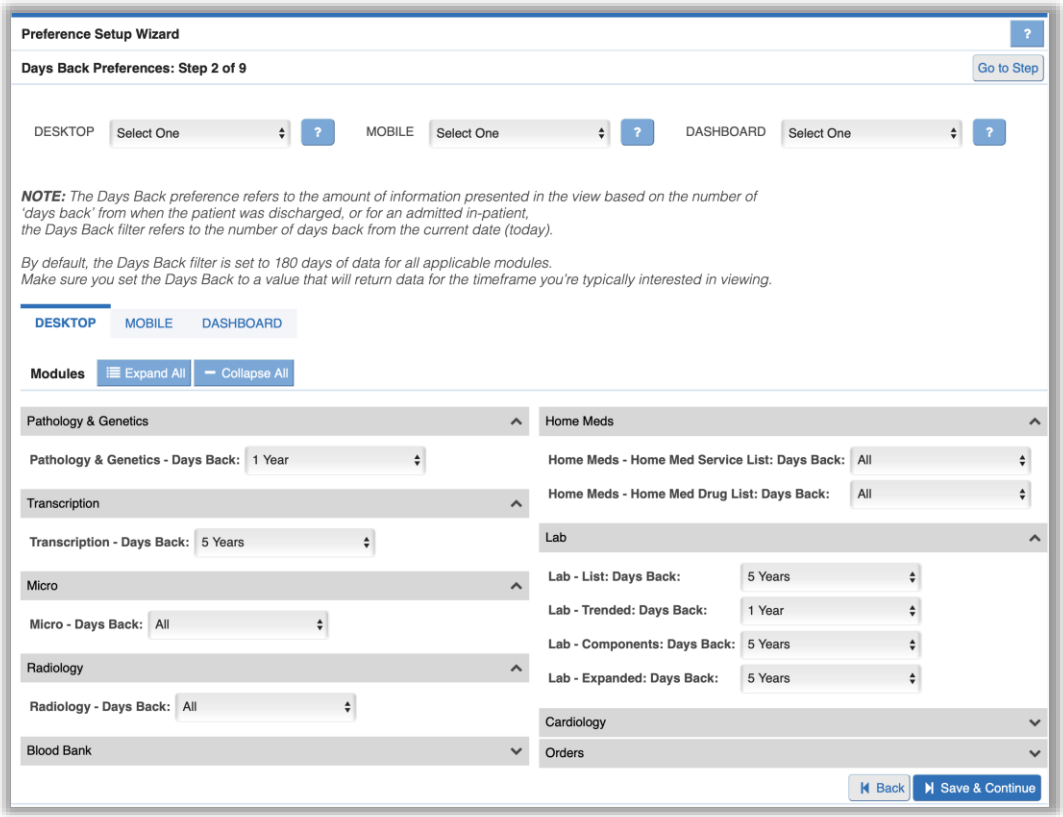
Note that the Encounter options should be set using the Preference Setup Wizard for the Patient Dashboard to ensure that the Dashboard modules display the desired amount of data.



Step 2 – Days Back Preferences

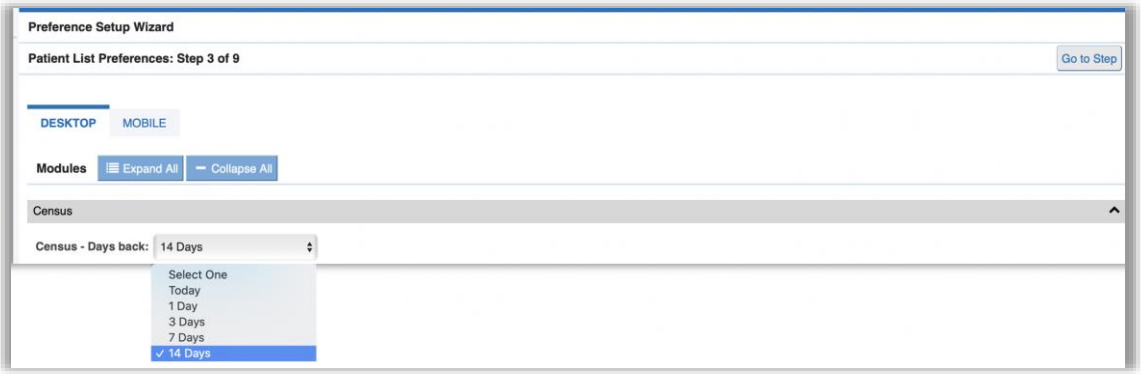
The **Days Back** preference refers to the amount of information presented in the view based on the number of 'days back' from when the patient was discharged, or for an admitted in-patient, the Days Back filter refers to the number of days back from the current date (today).

By default, the Days Back filter is set to **180** days for most modules when viewing data on desktop. Make sure you set the Days Back to a value that will return data for the timeframe you're interested in viewing when using a desktop or mobile device or from the Patient Dashboard.



Step 3 – Patient List Preferences

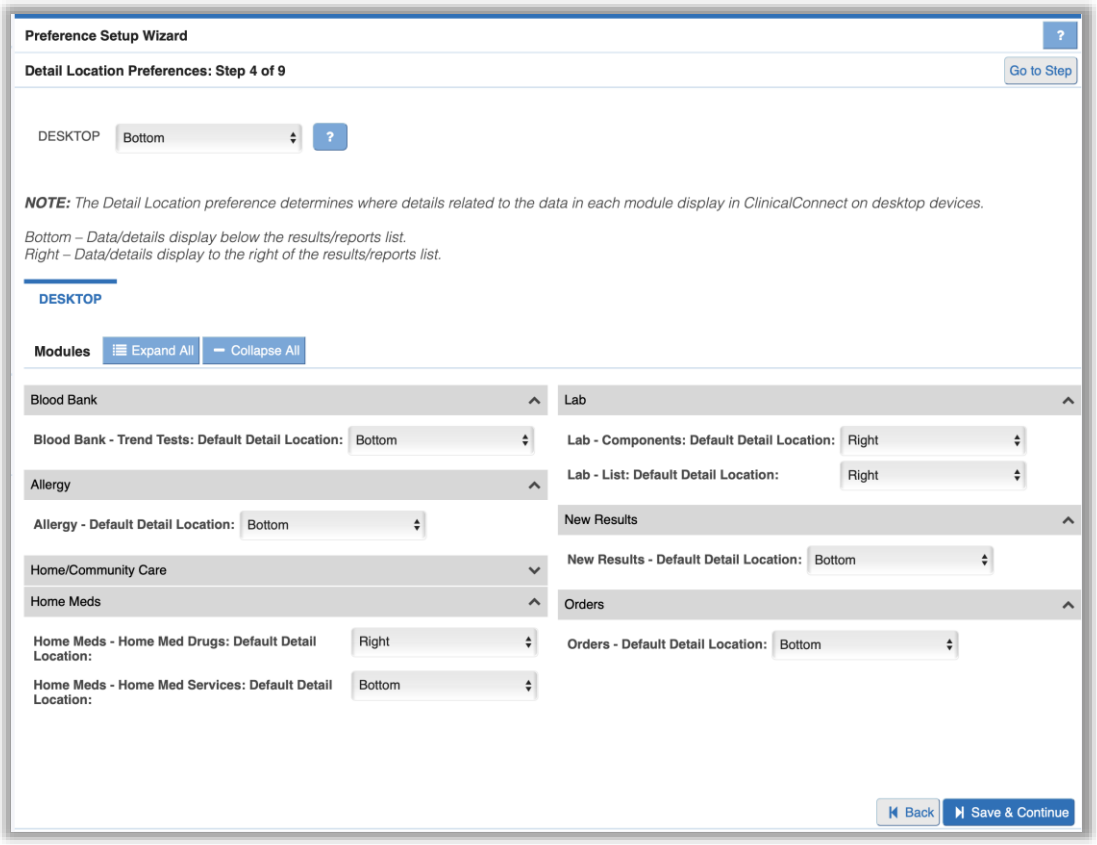
The **Patient List** preference allows you to set the number of Days Back specifically for your Patient Census Lists and can be set differently for Desktop or Mobile use by selecting each tab at the top of the page then selecting the Days Back options. The Census List, Days Back filter can be set to a maximum of 14 days back.



Step 4 – Detail Location Preferences

The **Detail Location** preference determines where details related to the data in each module display in ClinicalConnect on desktop devices.

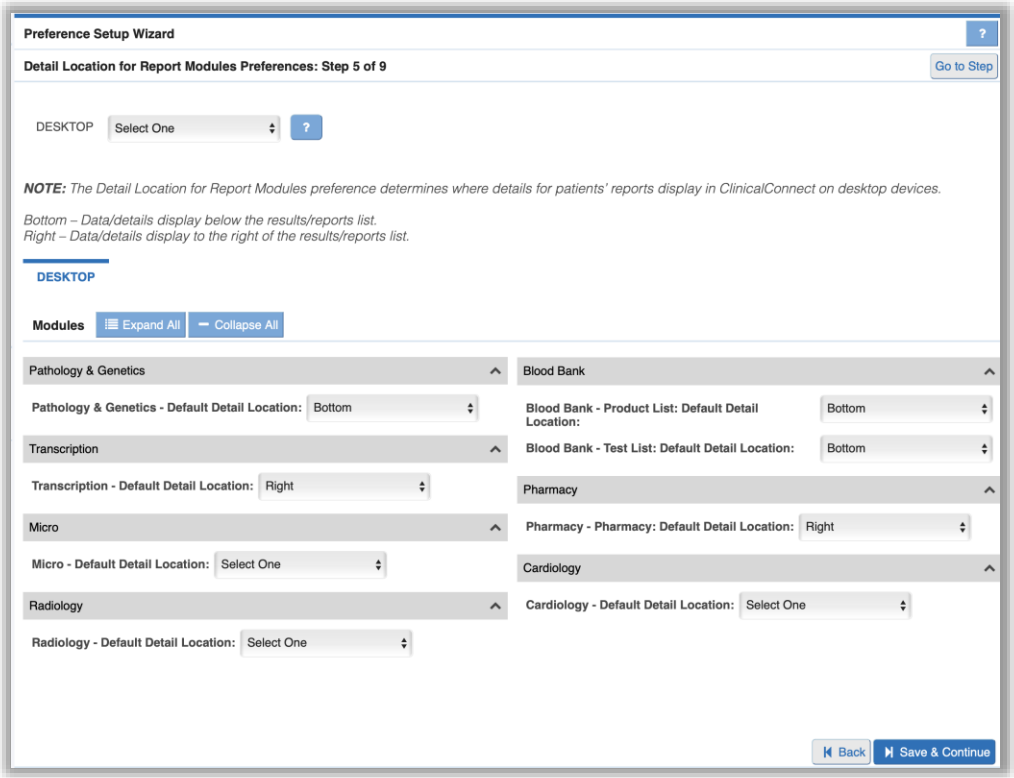
- **Bottom** – Data/details display below the results/reports list.
- **Right** – Data/details display to the right of the results/reports list.



Step 5 - Detail Location for Report Module Preferences

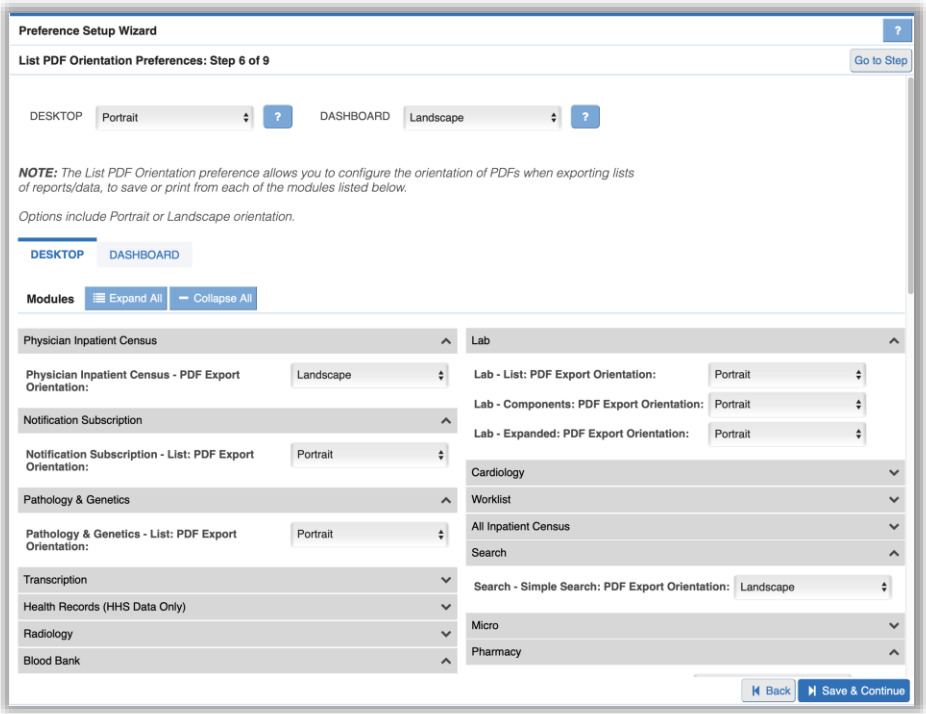
The **Detail Location for Report Modules** preference determines where details for patients' reports display in ClinicalConnect on desktop devices.

- **Bottom** – Report details display below the results/reports list.
- **Right** – Report details display to the right of the results/reports list.



Step 6– List PDF Orientation Preferences

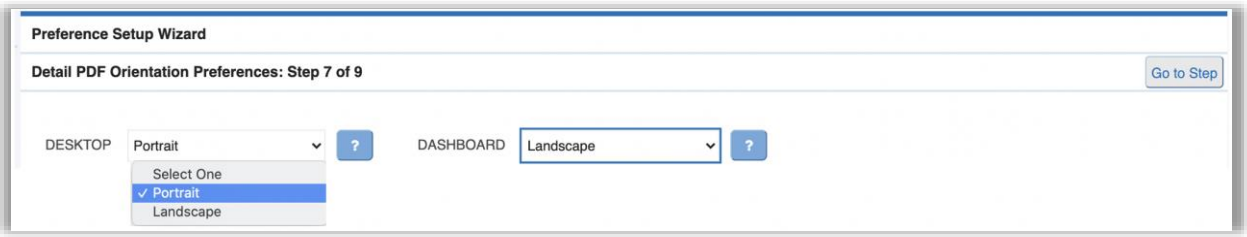
The **List PDF Orientation** preference allows you to configure the orientation of PDFs when exporting lists of reports/data, to save or print from each of the modules listed below. Options include Portrait or Landscape orientation. This option is only applicable to the Desktop and Dashboard modalities.



Step 7–Detail PDF Orientation Preferences

The **Detail PDF Orientation** preference allows you to configure the orientation of PDFs when exporting the details of the reports found in the modules listed below. Options include Portrait or Landscape orientation.

This option is only applicable to the Desktop and Dashboard modalities.



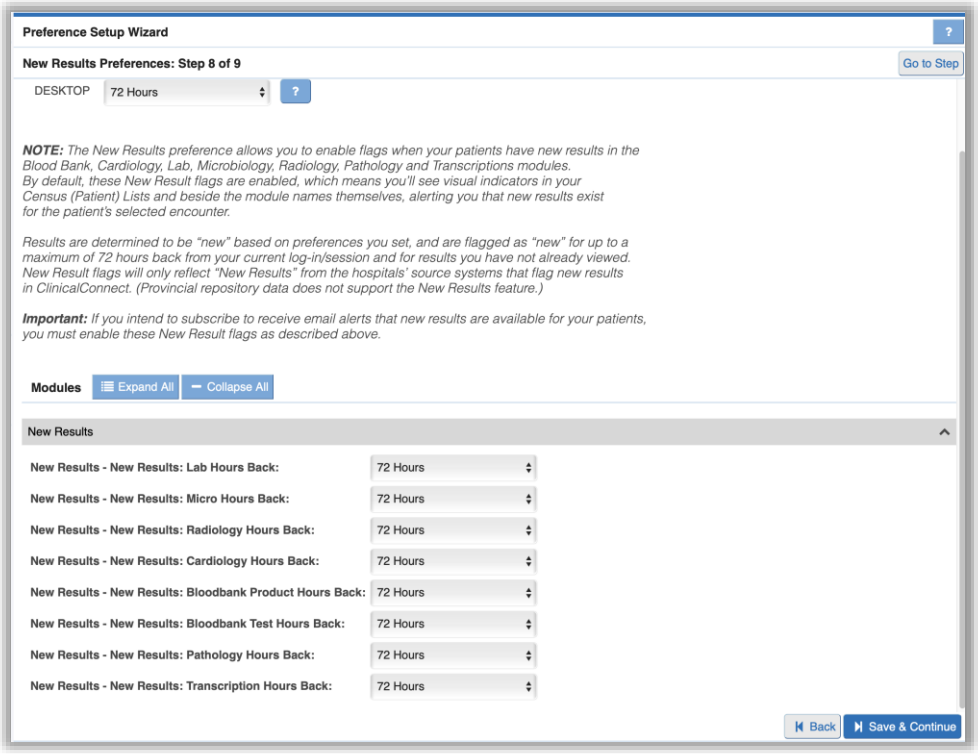
Step 8 – New Results Preferences

The **New Results** preference allows you to enable flags when your patients have new results in the Blood Bank, Cardiology, Lab, Microbiology, Radiology, Pathology and Transcriptions modules. By default, these New Result flags are enabled, which means you'll see visual indicators in your Census (Patient) Lists and beside the module names themselves, alerting you that new results exist for the patient's selected encounter.

Results are determined to be "new" based on preferences you set, and are flagged as "new" for up to a maximum of 72 hours back from your current log-in/session and for results you have not already

viewed. New Result flags will only reflect "New Results" from the hospitals' source systems that flag new results in ClinicalConnect. (Provincial repository data does not support the New Results feature.)

If you intend to subscribe to receive email alerts that new results are available for your patients, you must enable these New Result flags as described above.

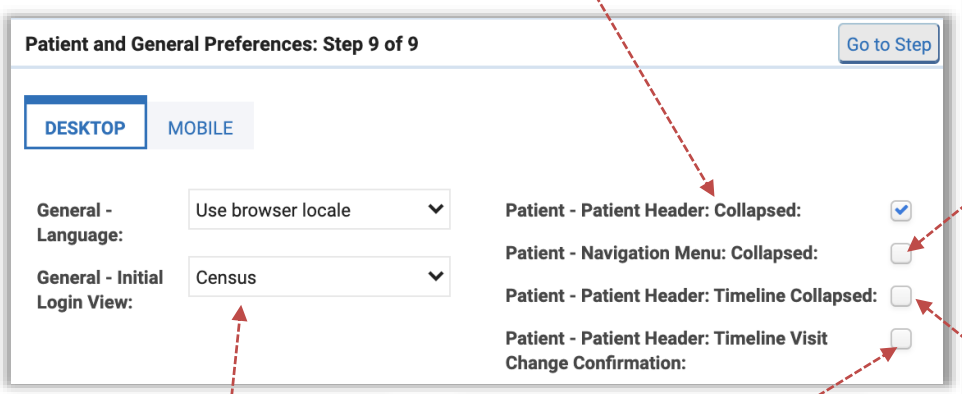


Step 9 – Patient and General Preferences

This last step allows you to set up general Desktop and Mobile preferences such as your preferred default **Initial Login View** and specifically for Desktop, the option to collapse the Patient Header (recommended), Timeline and Navigation Menu as described below. Once you have changed your settings, they will be applied the next time you log into ClinicalConnect.

Desktop General Preferences

The **Patient Header** setting allows you to collapse the patient header, which is recommended. This will increase your screen space when viewing information in the record.



The **Navigation Menu** setting allows you to collapse the module menu to only show module icons as your default. This will increase your screen space when viewing information in the record.

The **Patient Header Timeline** setting, if selected to collapse will remove the Timeline from the patient record view entirely.

The **Initial Login View** setting can be used to select the **Census list** or the **Advanced Search** options as the default when first logging into ClinicalConnect.

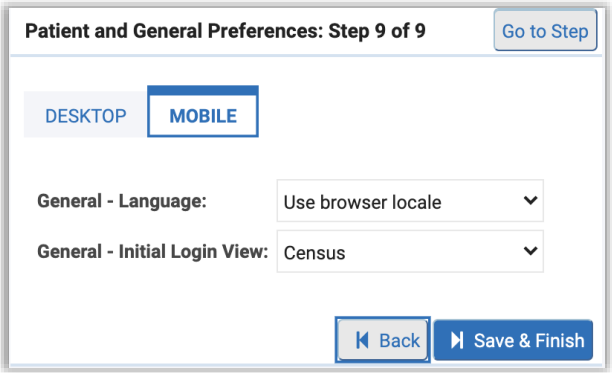
The **General Language** setting will default to *Use browser locale* and should not be changed.

The **Timeline Visit Change Confirmation** setting will suppress the 'Visit Change' message when selecting an encounter from the Patient Visits Timeline. This can also be applied from the patient's record when the message window displays by selecting "Never show this dialogue in the future".

Mobile General Preferences

There are only two general settings in the mobile view.

The **General Language** setting will default to *Use browser locale* and should not be changed.
The **Initial Login View** setting can be used to select the **Census list** or the **Advanced Search** options as the default when first logging into ClinicalConnect on mobile devices.



After finishing step nine, click **Save & Finish** and then click **Close** to exit out of the Preference Setup Wizard and return to your default census view.

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.

Printing

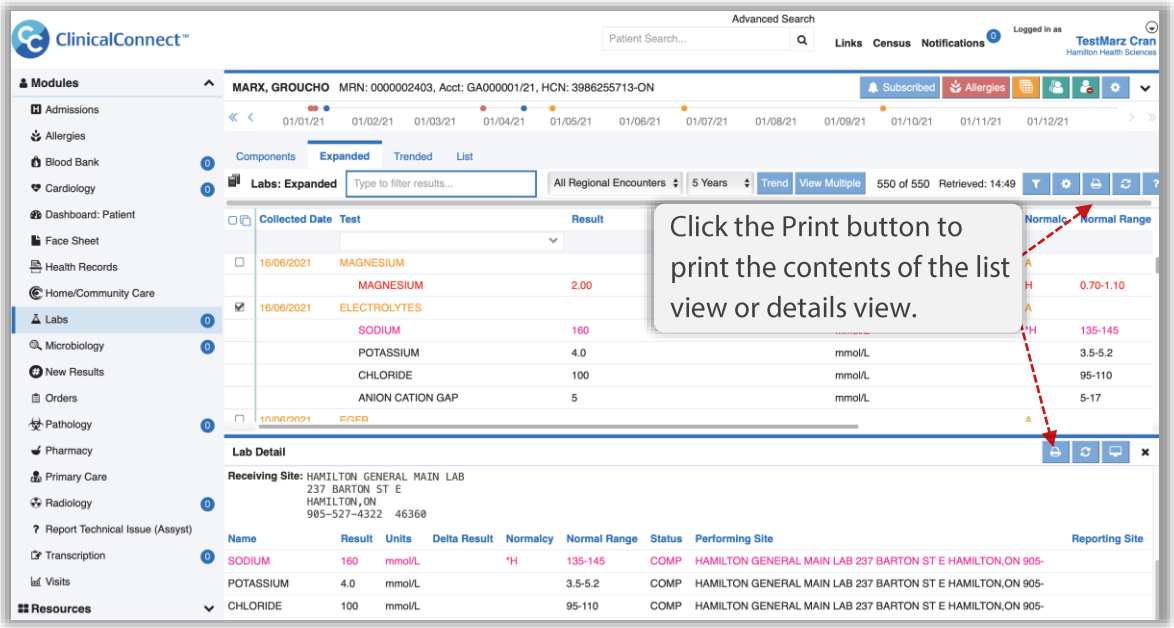
Show Me

Ask a Question

The print function is available in select ClinicalConnect module views. The **Print** button is located in the list or details view header. In most cases, when the print icon is selected in ClinicalConnect, the information in that view displays in as a PDF document. Adobe Reader 10.1.4 or higher is recommended to view records presented as PDFs in ClinicalConnect. In some cases, report details display in their original format (Microsoft Word for example) instead of PDF format. This is described in more detail in the individual module sections of this document.

If you download or print any personal health information (PHI) from ClinicalConnect you are responsible to protect the confidentiality of the record in accordance with your Privacy Policies and the requirements under the *Personal Health Information Protection Act, 2004* (PHIPA).

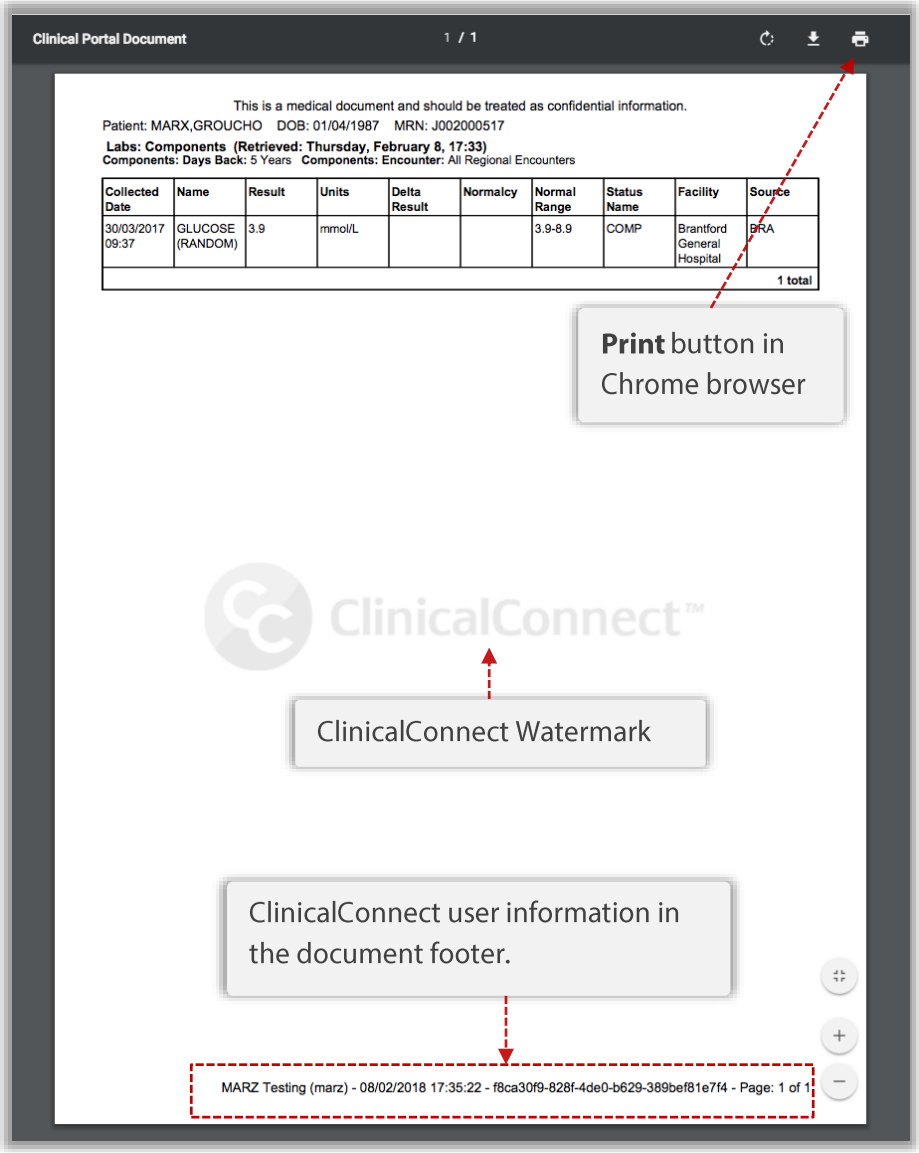
To print module lists and results click the **Print** button in the header of the list or detail window you want to print.



A PDF printable document will open in a new window. Use the print features on your computer's browser or document viewer to print the document. The printing steps may vary depending on your computer and browser settings.

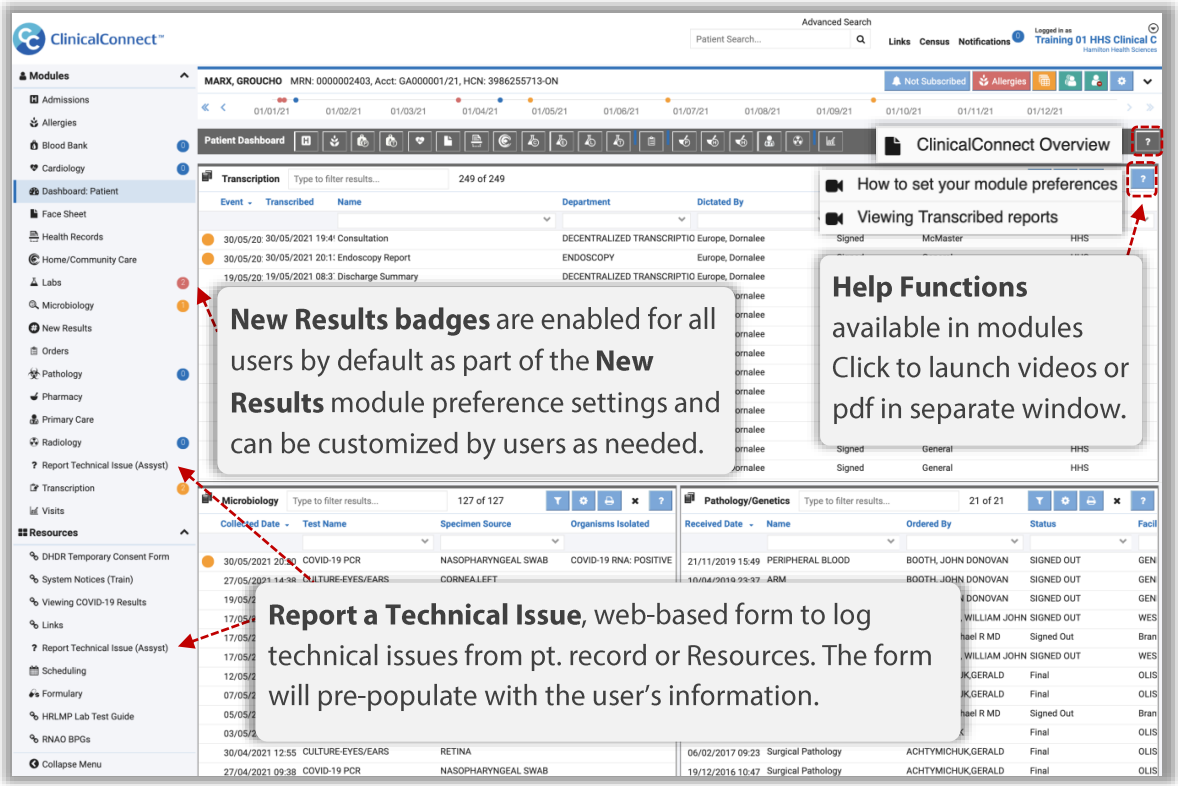
Any reports generated in PDF format will display the ClinicalConnect watermark and identifies your name, the date, and time the document was generated in the footer.

The following example shows a document ready for printing in the current version of the Chrome browser. To being the printing process, click the Print icon in the top right corner of the screen.



Navigation Layout

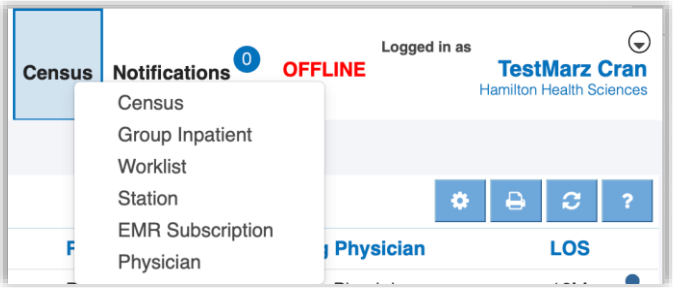
ClinicalConnect offers several features that can be used to change the way information is laid out on your screen. You can use these features to customize how data is presented on your screen.



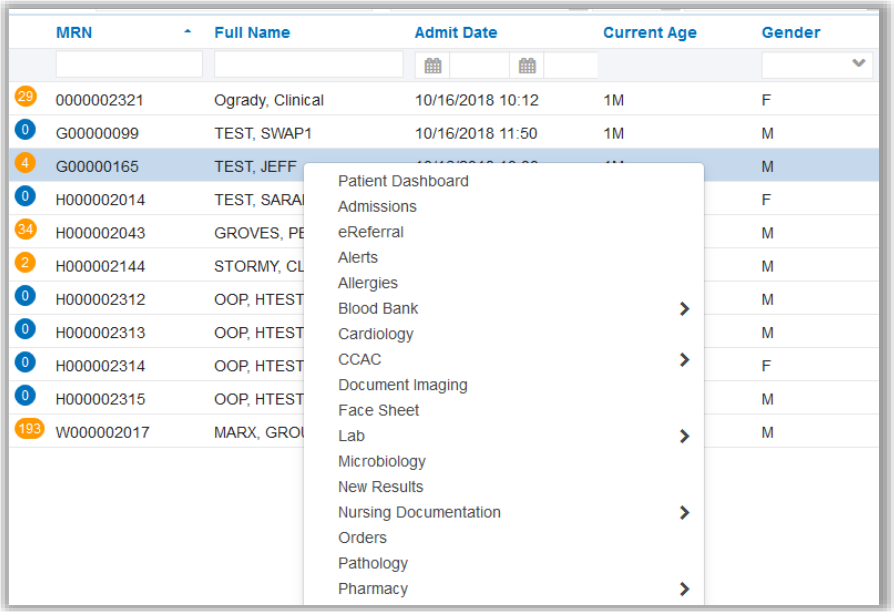
Using Keyboard Shortcuts

The Control (**CTRL**) + **Click** functions can be used to access shortcut menu options in ClinicalConnect.

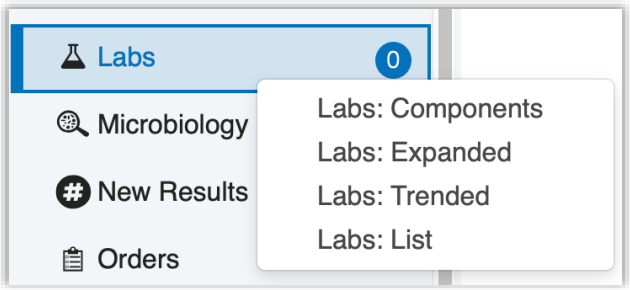
For example, hold down the CTRL button then click on the Census button in the application header. This will bring up a menu of your available census tabs.



From any Census list or Patient Search Results, hold down the CTRL button then click (CTRL + Click) on the patient's line to display a list of the modules that can be selected to open, bypassing the Dashboard landing page.

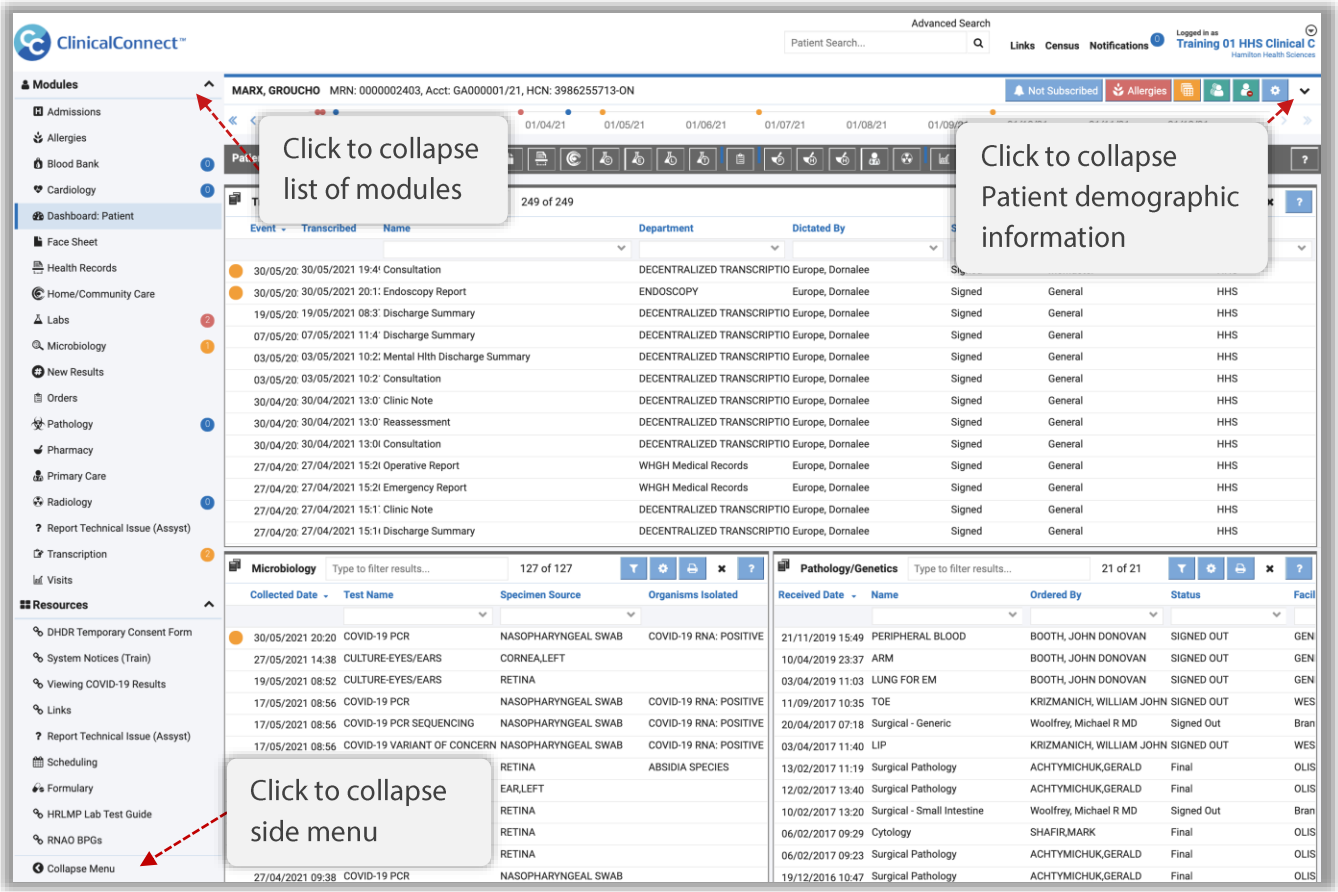


This same shortcut functionality (CTRL + Click) can be used for a module that has multiple tabs such as the Labs module.



Expanding and Collapsing Menu Options

An easy way to make more room on your screen is to use the expand and collapse features on your user interface.

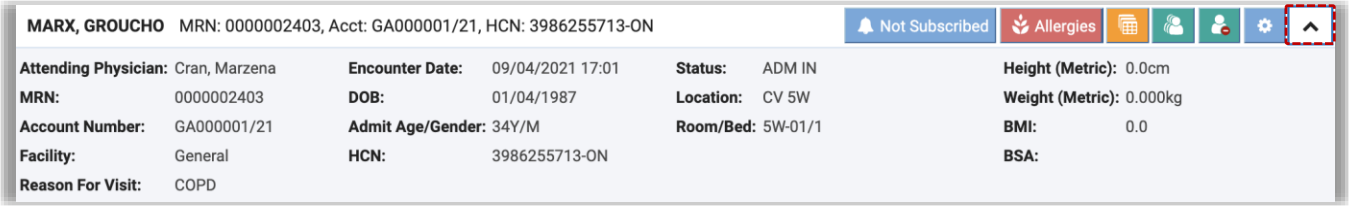


Navigation Layout (continued)

Patient Header Expand/Collapse

Clicking the expand/collapse button in the patient header allows you to show and hide the patient demographic information found in the header.

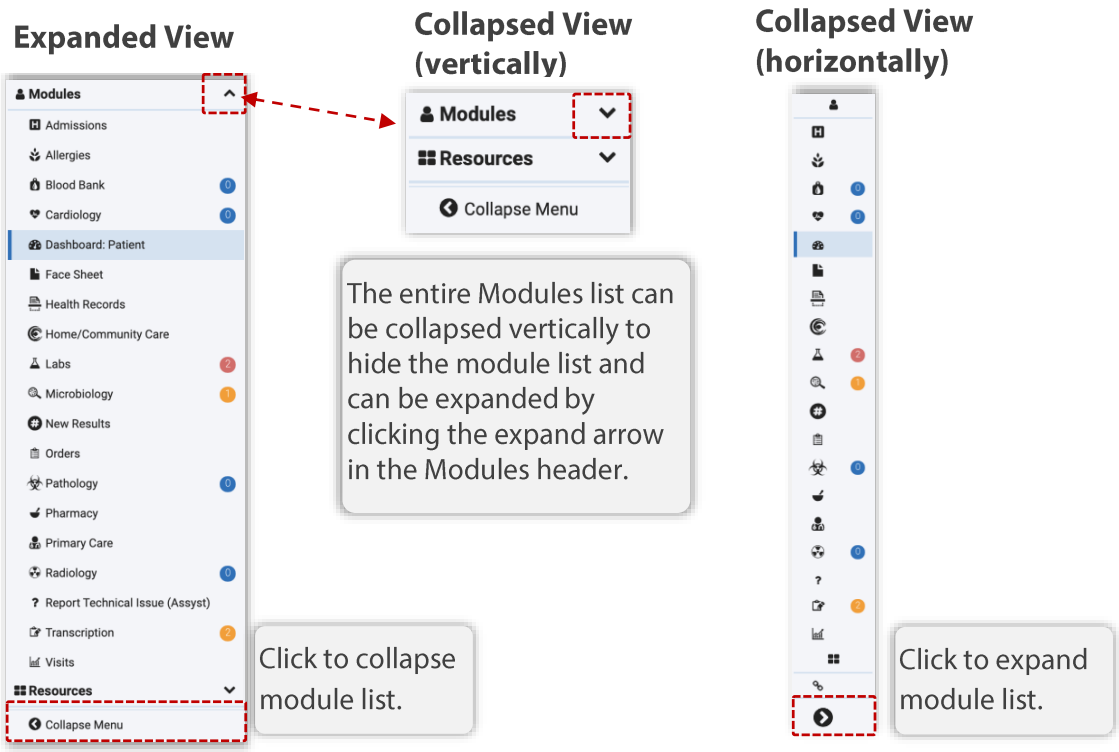
Expanded View



Collapsed View

Clinical Modules Expand/Collapse Menu

The module list panel on the left side of your screen can be collapsed horizontally by clicking the **Collapse Menu** option at the bottom of the panel. In the collapsed view you will no longer see the text titles associated with each item. Instead you will be able to click the module icon to access the module. New results flags are still visible in the collapsed view. To restore the modules menu, click the expand menu icon. The module list pane can also be collapsed vertically to hide the entire list as shown below.



Navigation Layout (continued)

To learn how to permanently hide your Patient Header and Clinical Modules menu, go to the section; [Setting Your Patient Header and Patient Visits Timeline Preferences](#).

Module View Options

Some modules allow you to quickly minimize certain areas of the ClinicalConnect screen in order to make more room for module lists and details. You can also customize where your module lists and details are located on the screen.

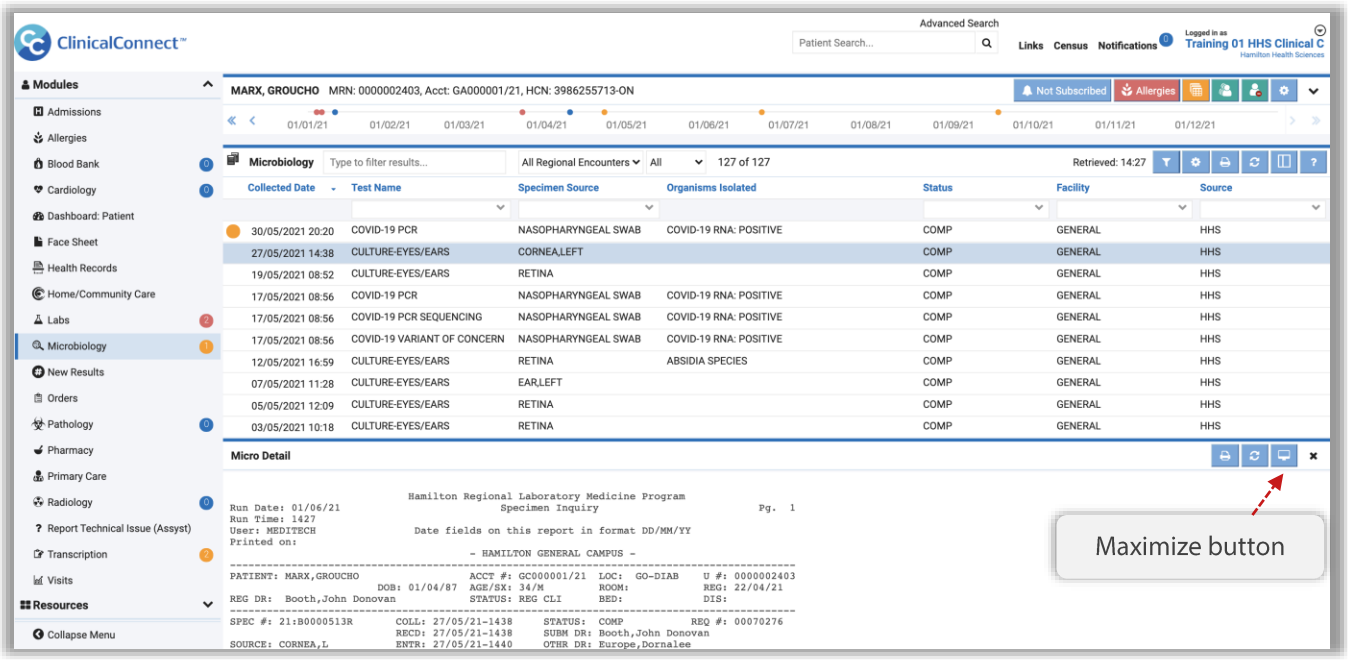
Maximize and Restore

The Maximize and Restore toggle button is located on the module's header in the details view. Clicking the **Maximize** button in the details view will hide the timeline above the module, collapse the patient demographic information, and collapse the module side menu to the icon view, allowing for more screen space to view the details of the selected item.

Clicking the **Restore** button will return the module to its default view.

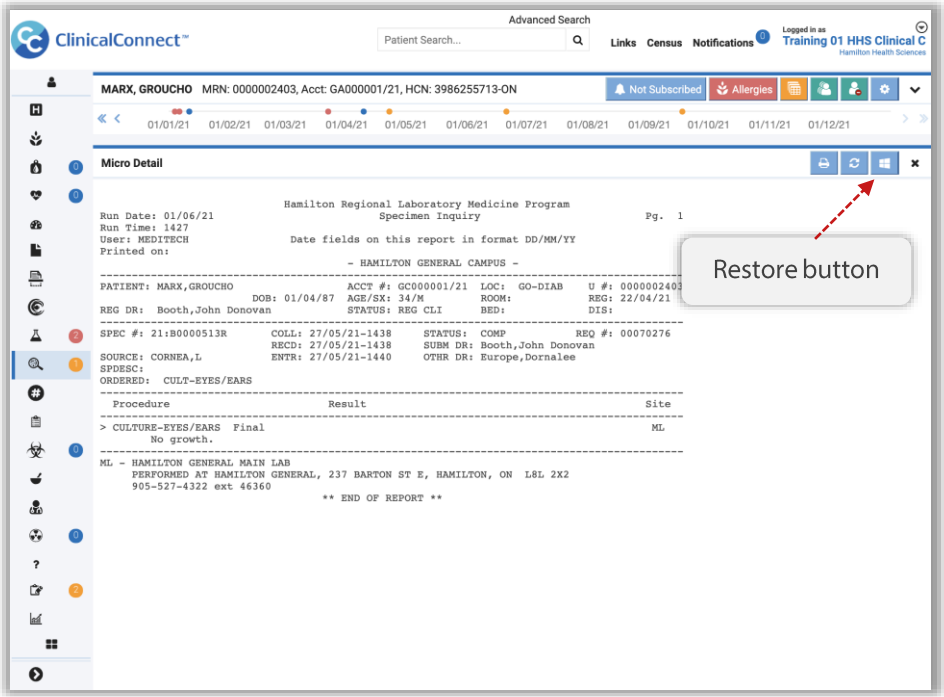
To maximize the details view

1. Click a result from the module list to open the details view.
2. Click the **Maximize** button in the detail view header to show the details view in full screen.



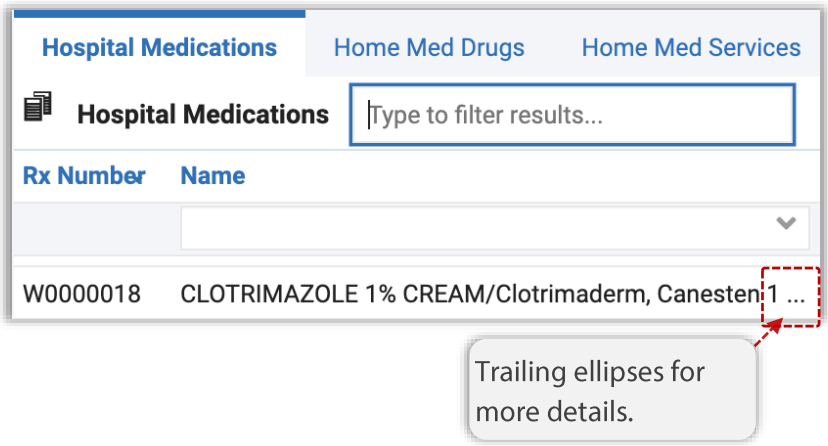
The image below is an example of the Microbiology result details fully maximized in ClinicalConnect.

3. Click the Restore button or the Close button in the details view header to exit the maximized full screen view.



Trailing Ellipses in Text Fields

In some case, columns of data may have long strings of text and will display with trailing ellipses indicating that there is more information available.
Click on the line item to view more details.



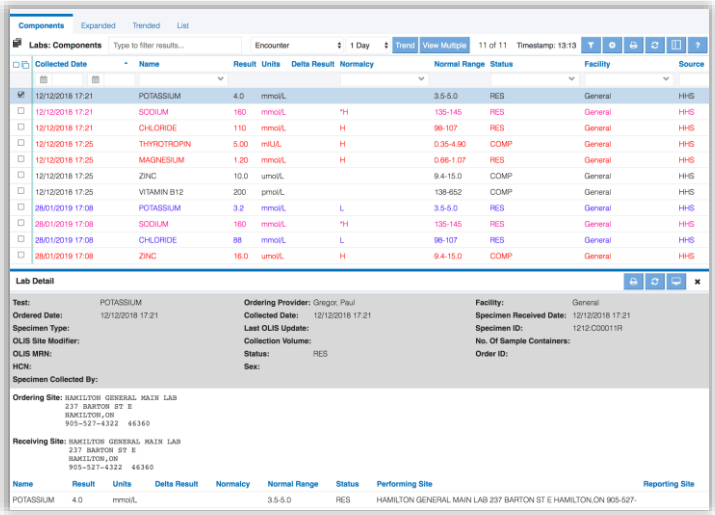
Navigation Layout (continued)

Viewing Record Details

You can change the layout of the list view and details view of a module to display in a side by side or top-bottom layout on your screen.

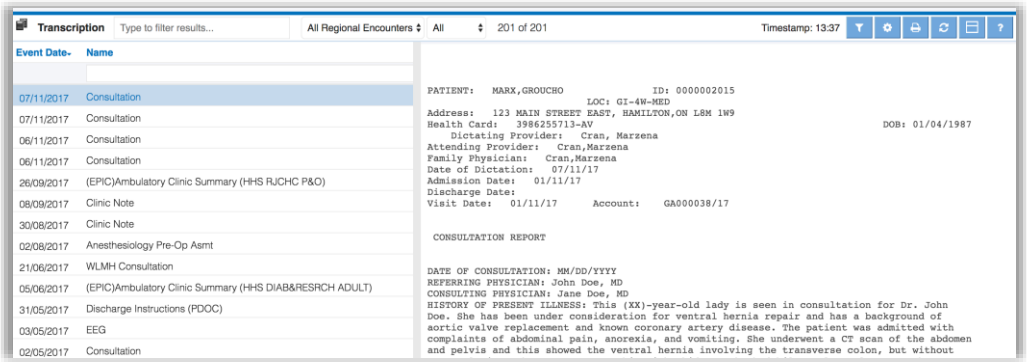
By default, the module list view is shown on the top and the details are on the bottom. If you prefer viewing the details on the right side of the screen, click the **Show the detail view to the right** button found on the module header. If you want to switch back to the default bottom view, click the **Show the detail view at the bottom** button.

Detail View on the Bottom



More columns in the list view are displayed when the detail location is on the bottom.

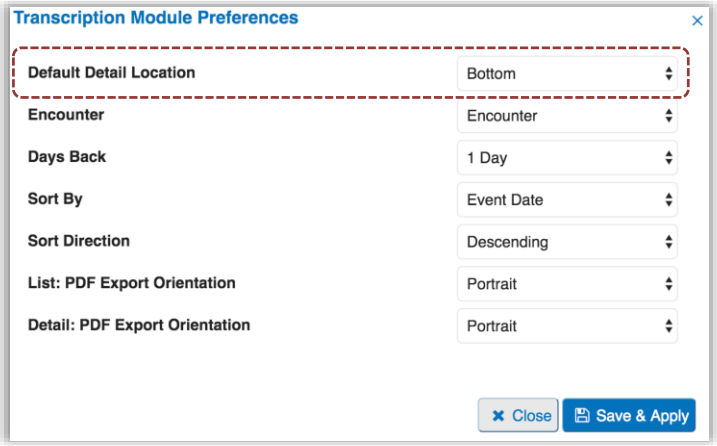
Detail View to the Right



Different views display better in different modules. For example, the Labs module is easier to view with the result details view on the bottom. You may prefer to view Transcription report details to the right which allows for quick scrolling through report types.

Both these settings can be configured in each module's preferences:

1. Click the **Preferences** button in the module header.
2. Use the **Default Detail Location** dropdown to select the view you prefer for that module.



3. Click the **Save & Apply** button.

Provider of Record Override

Show Me

Ask a Question

The Provider of Record (POR) override screen prompt is displayed when you are not currently associated through ClinicalConnect as a provider of record for the patient and are providing health care to a patient or assisting in the provision of health care to a patient.

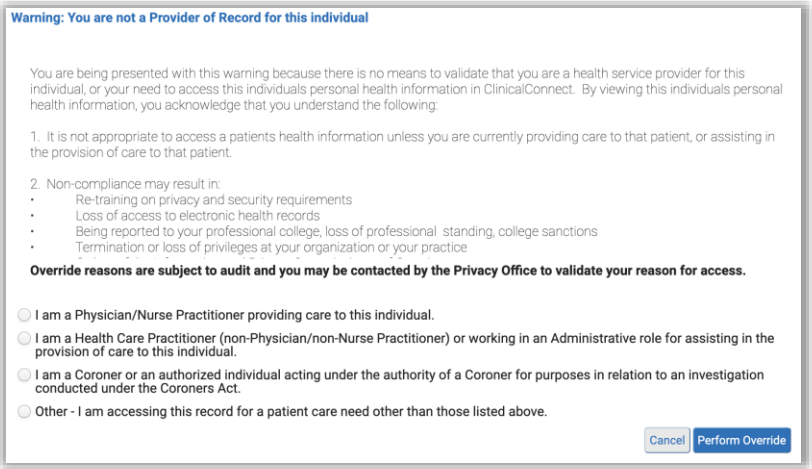
By proceeding, you are confirming that you need to access the personal health information as you are providing health care or assisting in the provision of health care to the patient. All instances of provider of record overrides are logged and monitored and you may be required to verify that your access to the personal health information was appropriate. Unauthorized access may result in disciplinary action that may include the disabling of your user account for the ClinicalConnect viewer, termination of your working relationship with one or more health information custodians, being reported to any regulated health professions college of which you are a member of, being reported to the Information and Privacy Commissioner of Ontario (IPC) and you may be subject to legal action or fines.

Healthcare Providers within the circle of care for a patient are not required to perform the override. All ClinicalConnect access is logged and monitored. Healthcare providers accessing ClinicalConnect are required to accept and comply with the ClinicalConnect User Agreement. Examples of Override Reasons are shown below.

To perform an override:

1. Select one of the following reasons for requesting an override:

    1. I am a Physician/Nurse Practitioner providing care to this individual.
    2. I am a Health Care Practitioner (non-Physician/non-Nurse Practitioner) or working in an Administrative role for assisting the provision of care to this individual.
    3. I am a Coroner or an authorized individual acting under the authority of a Coroner for purposes in relation to an investigation conducted under the Coroners Act.
    4. Other – I am accessing this record for a patient care need other than those listed above.



2. Click the **Perform Override** button to open the patient's record.

Confidential and Sealed Patient Records

Some Hospital Information Systems (HIS), Home and Community Care Services (HCCS), and Ontario Laboratory Information Systems (OLIS), will flag a patient's record or certain aspects of the patient's account (such as reports or visits) as confidential or sealed.

The following table explains how confidential and sealed patient records are displayed in ClinicalConnect based on the source of the record.

Confidential/Sealed Record Source	ClinicalConnect Display Details
HIS	ClinicalConnect will display the confidential and sealed flags that have been applied in the source hospital systems to the following confidential/sealed record levels (if applicable): • The entire patient's record • A specific patient encounter or visit • A specific patient test or report
HCCS	Confidential and sealed Home and Community Care Services patient records are not made available in ClinicalConnect and will not display.
OLIS	ClinicalConnect will recognize OLIS confidential and sealed reports, prevent the user from viewing the information, and present a patient consent directive message. OLIS can restrict data for a specific test or the entire OLIS record. If an OLIS test is restricted, that test will not appear in the associated ClinicalConnect module. A message will be displayed indicating **Some or all information has been restricted due to a patient consent directive.** If the entire OLIS patient record is restricted, then no OLIS data will be displayed in any module of ClinicalConnect and the same message will be displayed indicating **Some or all information has been restricted due to a patient consent directive**. OLIS restricted records cannot be overridden in ClinicalConnect.

DHDR	All Ontarians have the right to withdraw consent to the sharing of their publicly-funded drug and pharmacy service, or monitored drug information available through the DHDR. ClinicalConnect honours the consent directive and will display the following message in the patient's ClinicalConnect record: **CONSENT DIRECTIVE IN PLACE: Access to Drug and Pharmacy Service Information has been blocked by the Patient. Select button below to temporarily unblock access.** If a patient has a consent directive applied to their entire record in DHDR, the Home Med Drugs and Home Med Services tabs in ClinicalConnect will display the following message: **No Records Found.**
DICS	A patient has the right to withdraw consent to access and use of their full or partial records from DI Common Service through the current Ontario Health process. ClinicalConnect will honour consent restrictions and display the following message in the patient's ClinicalConnect record: **There is a consent directive in place for the selected patient** Clinicians may contact Ontario Health's Service Desk Support at 1-866-250-1554 or email at OH-servicedesk@ontariohealth.ca. **DICS restricted records cannot be overridden in ClinicalConnect.**
acCDR	A patient has the right to withdraw consent to the access and use of their full or partial records from acCDR through the current Ontario Health process. ClinicalConnect honours any partial or full consent restriction and will display the following message in the Transcription and Visits modules: **There is a consent directive in place for the selected patient** If access to a blocked record is required, you may contact Ontario Health Service Desk Support at 1-866-250-1554 or by email at OH-servicedesk@ontariohealth.ca. In cases where the report is from a source contributing system that has multiple facilities, the Facility column will display the name of the site. **acCDR restricted records cannot be overridden in ClinicalConnect.**

How do HIS confidential/sealed records display in ClinicalConnect?

Confidential/Sealed Search Results View

When performing a simple or advanced search, confidential/sealed patient records display in the search results with only the following patient identifies visible: **Medical Record Number (MRN), Full Name, Date of Birth (DOB), Health Card Number (HCN)** and **Facility**. The remaining fields will be masked as confidential or sealed. This limited demographic information is displayed to assist the physicians and clinicians in accurately identifying the patient's record.

Confidential Result Example

MRN	Full Name	Encounter Date	Account Number	DOB	HCN	Location	Room	Bed	Attending Physician	Facility	Source
H0000012	TEST,AMY	Confidential	Confidential	03/12/1987	9874563217	Confidential	Confidential	Confidential	Confidential	St. Mary's General Hospital	StMary

Sealed Result Example

MRN	Full Name	Encounter Date	Account Number	DOB	HCN	Location	Room	Bed	Attending Physician	Facility	Source
H0000012	TEST,AMY	Sealed	Sealed	03/12/1987	9874563217	Sealed	Sealed	Sealed	Sealed	St. Mary's General Hospital	StMary

Station Census View

When viewing a station census, a confidential/sealed patient record will display in the station census list with only the following patient identifies visible: **Medical Record Number (MRN), Full Name** and **Gender**.

Census | Group Inpatient | Worklist | **Station** | Physician Census

Station | Type to filter results... | Brant Community Healthcare System | 6 of 6 | Timestamp: 15:15

Full Name	Encounter Date	Discharge Date	Visit Type	Current Age	Gender	MRN	Location	Room	Bed	Attending Physician	LOS
TRUMAN,JOHNNY TEST	15/12/2017 11:40		IN	34Y	M	H000001599	B4 ER DECANT	B.431	1	MDLastTwo, MDTwo	15M
TEST,HALINA	26/09/2016 11:41		IN	52Y	F	H000001125	B4 ER DECANT	B.433	1	Shott, Craig A MD	2Y
TEST,CLINICALCONNECT	08/02/2017 10:40		IN	14Y	F	H000001390	B4 ER DECANT	B.443	1	Kugathasan, Kaplan MD	2Y
TEST,ALEXIS	23/04/2018 20:37		IN	10Y	F	H000001139	B4 ER DECANT	B.443	2	Padamadan, Philsamma MD FRCPC	10M

Worklist View

If a confidential/sealed patient has been added to your worklist, the record will display the confidential/sealed mask each time you log into a ClinicalConnect session. A confidential/sealed override can be performed (by physicians coroners and nurse practitioners only) to view the patient's record. If an override is not performed, the patient will display in your worklist with only the following patient identifiers visible: **Medical Record Number (MRN), Full Name**, **Gender** and **Visit Type.**

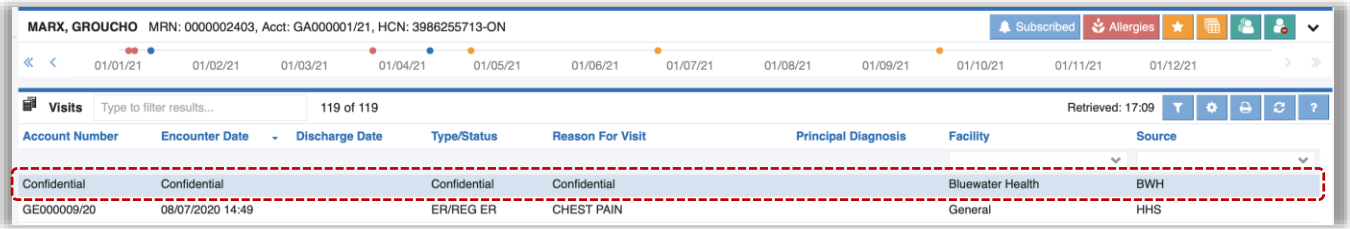
Census | Group Inpatient | **Worklist** | Station | Physician Census

Worklist | Type to filter results... | 4 of 4

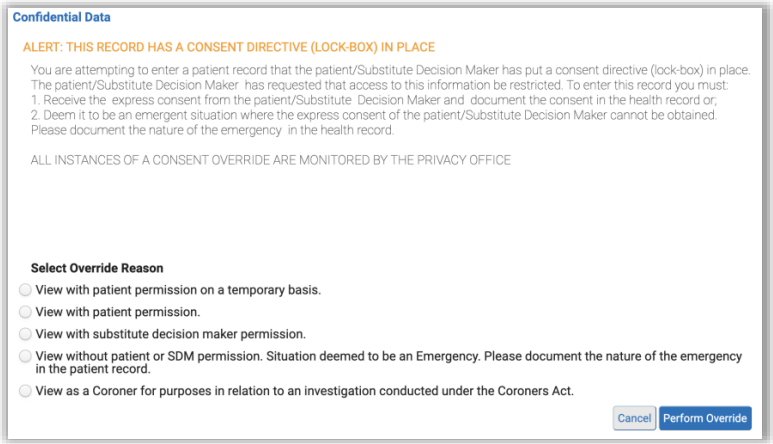
Full Name	Encounter Date	Discharge Date	Visit Type	Current Age	Gender	MRN	Location	Room	Bed	Attending Physician	LOS
MARX,GROUCHO	09/04/2021 17:01		IN	36Y	M	0000002403	CV 5W	5W-01	1	Cran, Marzena	2Y
TEST,AMY			REF	35Y	F	0000002542	Medical Day Care - General				
WHITEBACK,TONI			REF	52Y	M	0000003391	Medical Day Care - General				
ENOTIFICATION,CONFIDENTIAL	Confidential	Confidential	IN	Confidential	M	0000002876	Confidential	Confidential	Confidential	Confidential	Confidential

Confidential/Sealed Encounter flagged in the Visits Module:

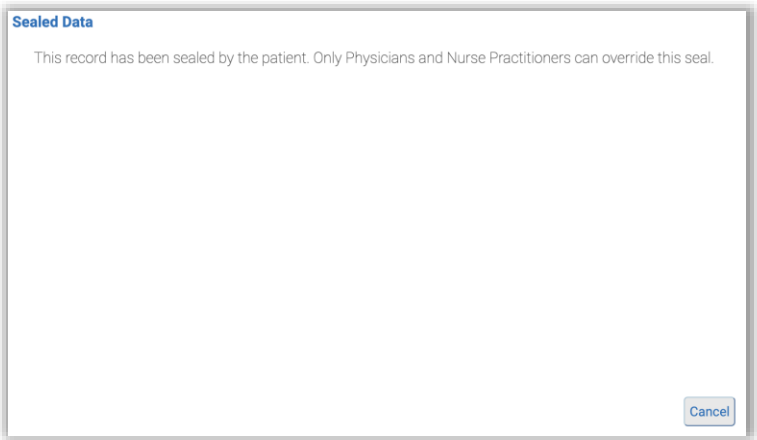
When a patient's specific encounter or visit has been sealed by the source system, the patient demographic details will display in the patient header for all visits **except** those with confidential/sealed restrictions if selected.



If a confidential/sealed encounter is selected from the **Visits** module, **physicians, nurse practitioners, or coroner users** will be prompted with the confidential/sealed override reason message. If you do not wish to proceed with the override, simply click the Cancel button.

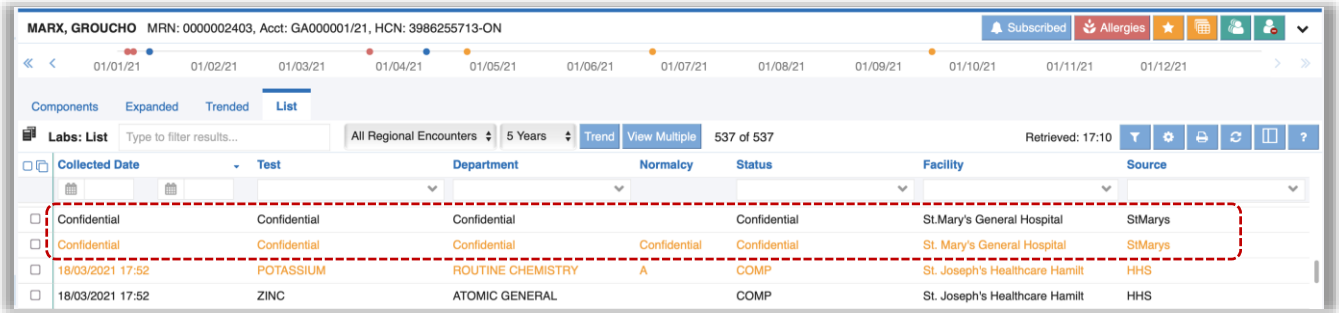


All others who are not physicians, nurse practitioner or coroner users will not be permitted to perform the override and will receive the following message: **This record has been sealed by the patient. Only Physicians and Nurse Practitioners can override this seal**.



Confidential Tests and Reports

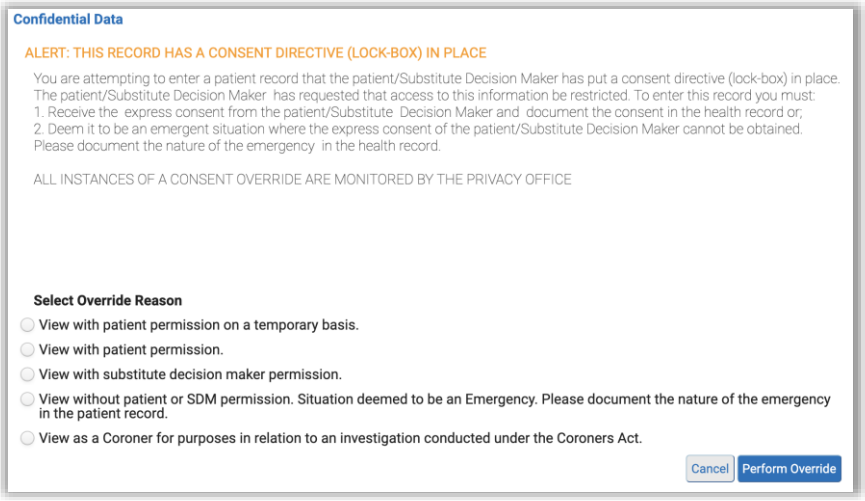
In some instances, a specific laboratory test or report can be confidential. Confidential test results and reports mask all information except the Facility.



Confidential Override Privileges

Only physicians, nurse practitioners, or coroners have been assigned override privileges where they are able to override the confidential or sealed restriction and access the record. All other users will not have override privileges and will be presented with a confidential/sealed data mask screen when accessing a patient's confidential or sealed record, specific encounter, or a specific test or result.

Physicians, nurse practitioners, or coroners accessing a confidential or sealed patient record will be prompted with the confidential/sealed override reason message and must select the most appropriate override reason.

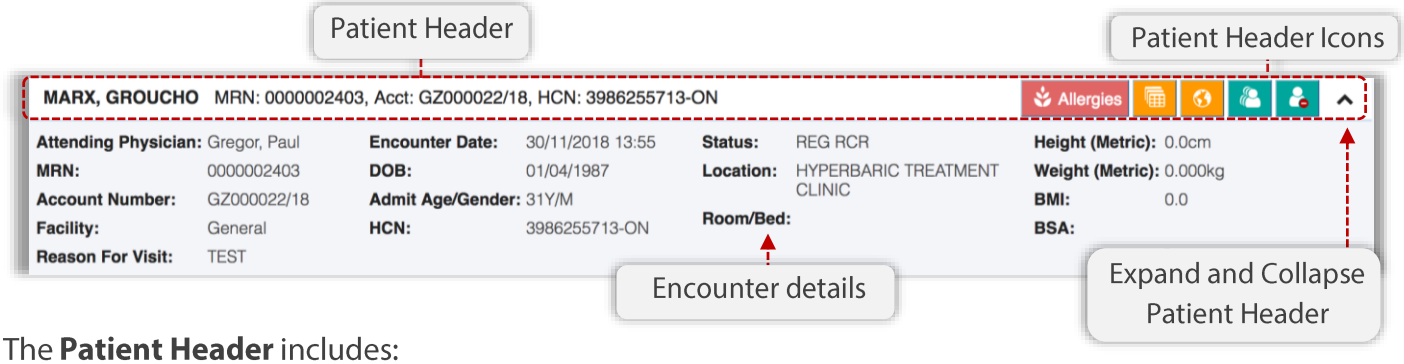


If you do not wish to proceed with the override, click the **Cancel** button.

All overrides are tracked and will be audited.

Patient Header and Demographic Information

The patient's record displays a patient header and demographic information at the top of the screen that can be expanded or collapsed to display additional encounter details.



The **Patient Header** includes:

- The patient's name, MRN, Account number and HCN (if available)
- Patient header icons located to the right can be used as quick alerts and can be hovered over to show tool tips
- If the patient header is expanded, as shown above, showing additional encounter-specific data from the source system.

Patient Header Icons

The table below provides an overview of the patient header icons that may display in the patient record header if they apply to the patient and if the information is available from the contributing source system.

Some patient header icons are also colour coded for quick recognition:

- Red – Alert.
- Orange – Warning
- Green – Informational
- Blue – Action button

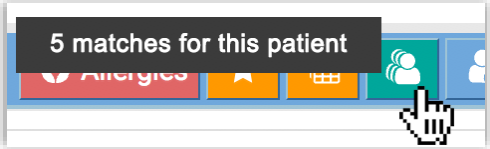
Icon	Description
Allergies Allergies No known allergies Allergies Not Documented/Collected	**Allergy icons are colour coding based on the allergy information available from the contributing source systems and display as follows:** • **Red Icon – Specific allergies have been added to the patient's record** • **Blue Icon – No known allergies have been added to the patient's record** • **Orange Icon – No allergies have been added to the patient's record or not available** **For more information, refer to the Allergy section**
Add Patient to Worklist Remove Patient from Worklist	**The ADD or REMOVE buttons display in the Patient Search results list, Census lists and in the patient's record and can be used to add or remove the patient from your Worklist.**
VIP Patient Flag	**A star icon displays in the patient header if the patient has been tagged in some source hospital systems as a VIP patient.** **Hover over the icon to view the alert details. The use of this flag may be customized by the source hospital system and is associated with the selected encounter only. If a new patient encounter is selected, this flag may not appear or may display a different alert.** **Example:** MRSA POSITIVE **ED encounter information from select hospitals may not be available. Please check the Visits module in the patient's record for more hospital encounter details.**

Patient Matches

The Patient Matches icon indicates that more than one match has been found across the contributing source systems, based on patient's last name, date of birth and Health Card Number.

Provincial repository data retrieves information based on the patient's Health Card Number (HCN) match. The Patient Match details screen will display eHealth Ontario. In cases where a HCN is not available or invalid, data from the provincial repositories will not be accessible. Patient matches from the Ontario Laboratories Information System will display OLIS in the Source column.

Hover over the Patient Matches icon to display the number of matches found for the patient.



Click the icon to display a list of the matching patients.

Mother Link

This button provides a link to the mother's record when the baby delivery visit is selected.

Click the icon to open the mother's record.

Not all hospitals are currently linking the mother and baby in their source systems, and in such cases this icon will not appear in the patient's record.

Baby Link

This button provides a link to the baby's record when the mother's delivery visit is selected. Click the icon to view the baby's record. In cases of multiple births, all babies will be listed.

Not all hospitals are currently linking the mother and baby in their source systems, and in such cases this icon will not appear in the patient's record.

Deceased Patient

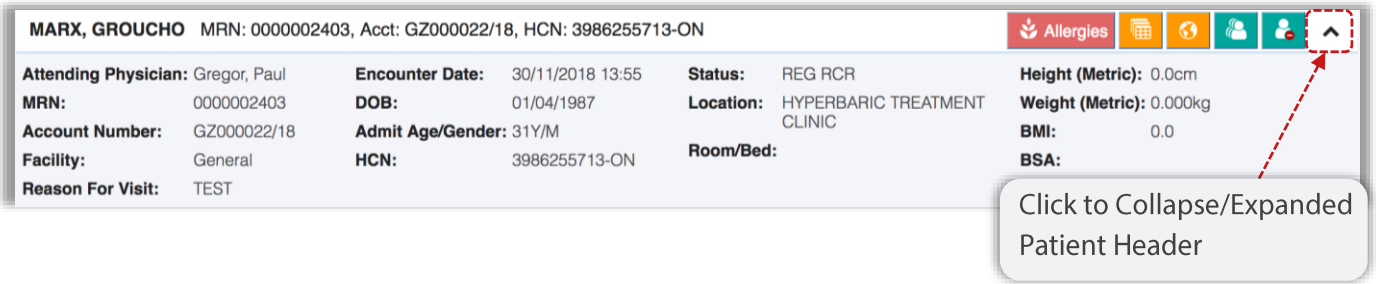
This button indicates the patient is deceased if the information is made available from the hospital source systems. Hover over the icon to display the date of death.

Example: Date of Death: 27/11/2015

Frequent ED Visits	**This icon indicates the patient has had five or more Emergency Department (ED) visits at acute care facilities in South West Ontario within the last 366 days from most current encounter.** **Click the icon to access the Visits module for a list of the patient's encounters.** **ED encounter information from select hospitals may not be available. Please check the Visits module in the patient's record for more hospital encounter details.**
Specific Visit	**This icon indicates that this module retrieves data for selected visits only.**
Options	**This icon indicates that this module allows the user to choose between retrieving data for the selected visit or all visits by using the encounter filter.**
Microfiche	**The Microfiche icon indicates that microfiche records exist for a patient in that facility. Contact the Health Records department of the source hospital for more information.**
Refresh	**The Refresh button is used to refresh the screen to update the information presented in the view.**
Video and PDF Help Function	This Help button is **available throughout the portal views. Clicking the button will display a list of "how to" short videos or quick tip guides.**
Subscribed Not Subscribed	**These buttons appear in the top banner of a patient's record and are used to manage your notification subscriptions. More information on setting up and managing your notification subscriptions can be be found in the Notification Subscriptions section of the guide.** **This option will only appear for authorized users of the Notifications Subscriptions feature.**
Preferences	**The Preferences button in the Patient header allows users to modify their general Patient Record Preferences and Notification Subscriptions.**

Collapsing the Patient Header

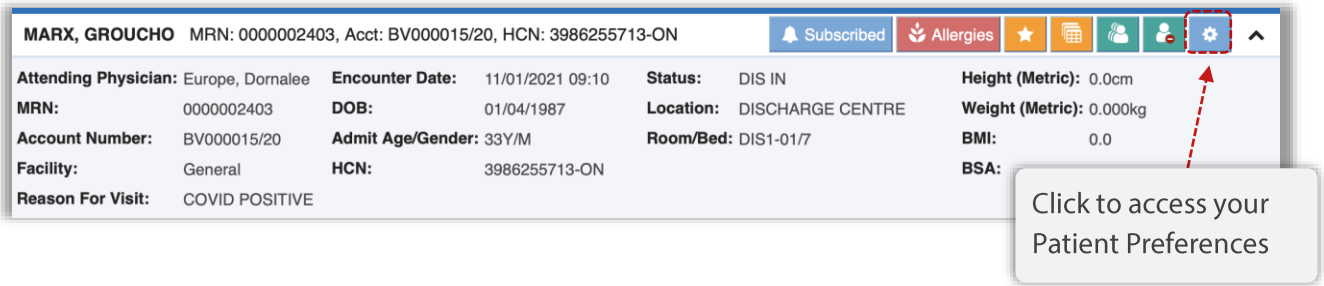
By default, the patient header remains collapsed to allow for more viewing space. Clicking the expand/collapse button in the patient header allows you to show and hide the patient's demographic information.



Set Your Default Preferences

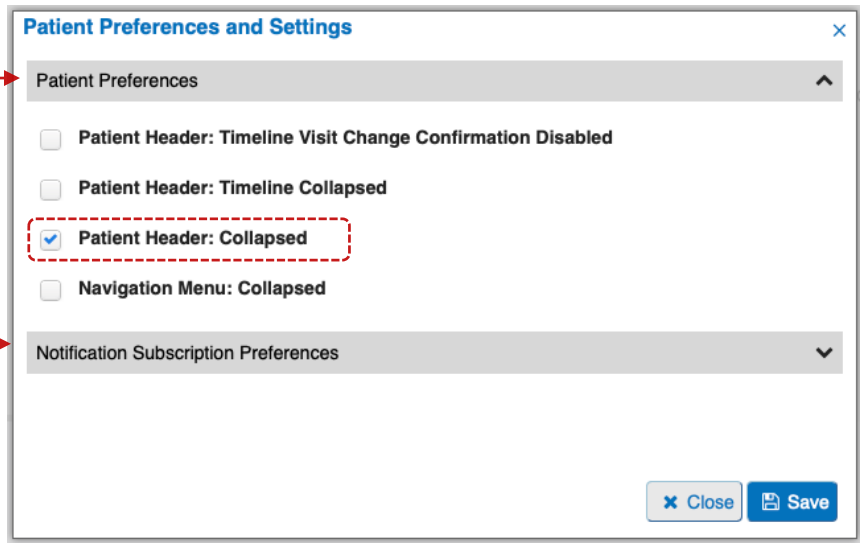
An easy way to customize your Patient Header preferences is by clicking the Preferences icon in the patient header. You can also set preferences from the Preference Setup Wizard and go to Step 9: Patient and General Preferences in the list.

You must log out of ClinicalConnect for these changes to be applied as your default view.



The Patient Preferences can be used to set how you would like to view the patient's record and by default, the Patient Header is set to be collapsed. You can change the settings as needed, then click **Save**.

To customize you general Notification Subscriptions, click the dropdown arrow to view the preferences. Please refer to the **Notification Subscriptions for New Results** for additional details.



New Results Module and Indicators

Show Me Ask a Question

In ClinicalConnect, users have the ability to enable the New Result flags to appear in the Blood Bank, Cardiology, Lab, Micro, Radiology, Pathology and Transcriptions modules. If enabled, these New Result flags will also appear as visual indicators in the census lists, alerting the user that new results exist for the patient's selected encounter.

The **New Results** module aggregates the results and displays them all in one list for the selected patient encounter contributed from the source hospital system. Each of these new results can also be viewed in the associated clinical module. Enabling the New Result flags is a pre-requisite of setting up Subscription Notifications as described further in this guide.

Results are determined to be "new" based on your individual **Preference settings** and are flagged as "new" up to a maximum of 72 hrs back from your current log in and for those results that you have not already viewed within your set parameters. These flags are associated with a patient's Medical Record Number (MRN) or equivalent and will reflect "New Results" contributed from the source hospital system.

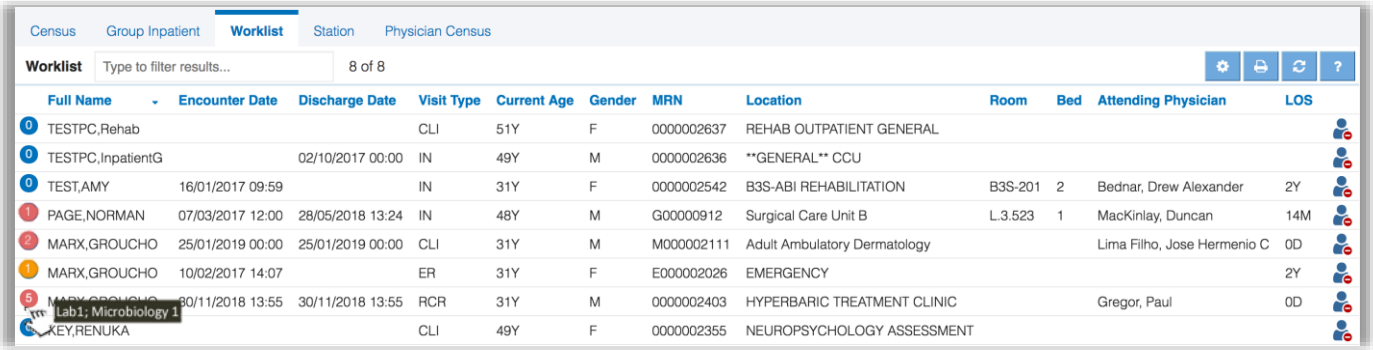
New results functionality is not available in the following cases and will not generate New Result flags in the associated modules:

- Transcribed reports from the Acute Clinical Data Repository (aCDR), HNHB Regional Cancer Program, St. Joseph's Healthcare Hamilton in the Transcriptions module
- Radiology reports from Diagnostic Imaging Common Services and St. Joseph's Healthcare Hamilton in the Radiology module
- Pathology reports from Hamilton Health Sciences and St Joseph's Healthcare Hamilton in the Pathology & Genetics module.
- OLIS data in the Lab, Microbiology and Pathology & Genetics modules
- The New Results indicator is not available in the Labs Component and Labs Trended views.

In these exceptions, users will not receive new result notifications if subscribed to the associated MRN.

For more details refer to the integration status chart located at https://info.clinicalconnect.ca/CC/healthcare/data-integrations

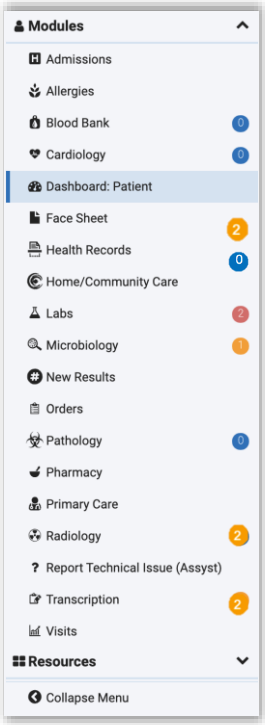
New Results flags will appear in the census lists (if enabled).



Full Name	Encounter Date	Discharge Date	Visit Type	Current Age	Gender	MRN	Location	Room	Bed	Attending Physician	LOS
TESTPC,Rehab			CLI	51Y	F	0000002637	REHAB OUTPATIENT GENERAL				
TESTPC,InpatientG		02/10/2017 00:00	IN	49Y	M	0000002636	**GENERAL** CCU				
TEST,AMY	16/01/2017 09:59		IN	31Y	F	0000002542	B3S-ABI REHABILITATION	B3S-201	2	Bednar, Drew Alexander	2Y
PAGE,NORMAN	07/03/2017 12:00	28/05/2018 13:24	IN	48Y	M	G00000912	Surgical Care Unit B	L.3.523	1	MacKinlay, Duncan	14M
MARX,GROUCHO	25/01/2019 00:00	25/01/2019 00:00	CLI	31Y	M	M000002111	Adult Ambulatory Dermatology			Lima Filho, Jose Hermenio C	0D
MARX,GROUCHO	10/02/2017 14:07		ER	31Y	F	E000002026	EMERGENCY				2Y
[illegible]	30/11/2018 13:55	30/11/2018 13:55	RCR	31Y	M	0000002403	HYPERBARIC TREATMENT CLINIC			Gregor, Paul	0D
[illegible]KEY,RENUKA			CLI	49Y	F	0000002355	NEUROPSYCHOLOGY ASSESSMENT				

From the Census list, you can hover over the New Results indicators to see a tool tip that shows the name of the module and the number of new results that are in the patient's record for that encounter.

New results are identified with colour coded visual indicators that display in various census lists, within the patient's record in the Clinical Modules menu, and in the New Results module list view. These flags serve as quick alerts showing that new results exist for the selected patient encounter.

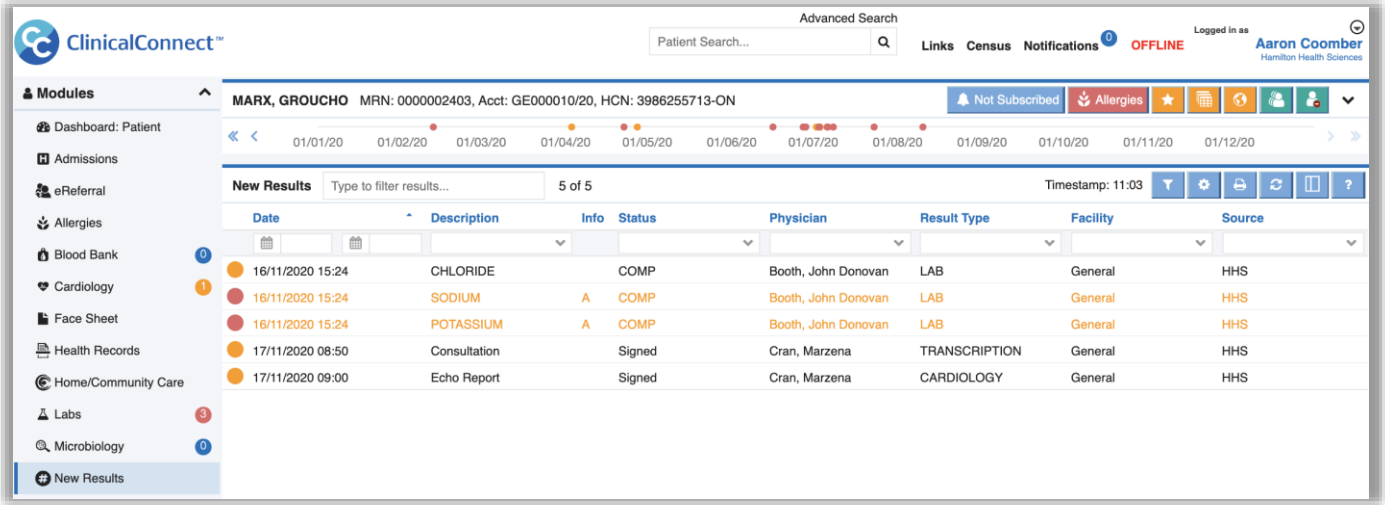


The new result flags are colour coded as follows:

- Red – New abnormal results available
- Orange –New results available
- Blue – No new results available

The indicators also have a number in each coloured indicator which tells you how many new results are available in each module for the selected patient encounter.

To access the New Results module, click the **New Results** option from the Clinical Modules menu.



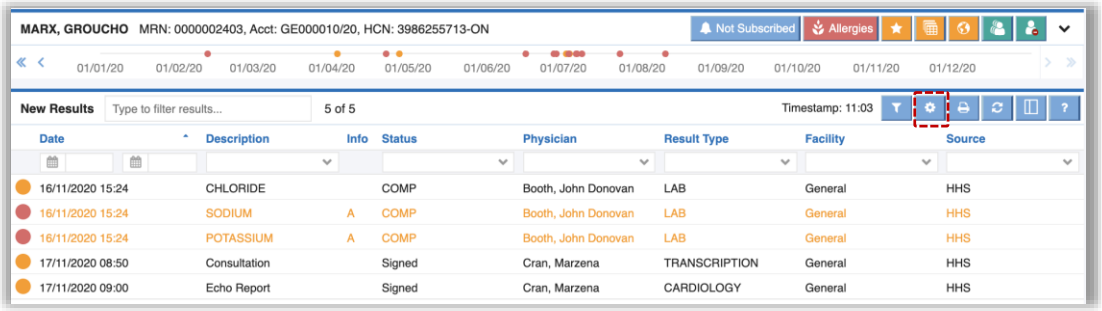
Clicking a result from the list will display the result details. Once a result is viewed, the new results flag is removed and is no longer considered a new result. The result will then no longer appear in the New Results module but can be accessed from the associated module.

New Results Module Preference Settings

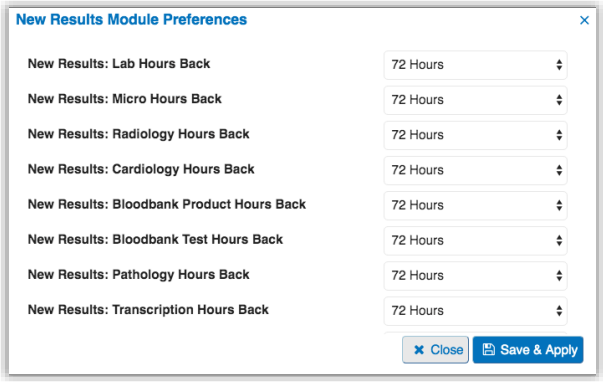
You can customize which modules you would like flagged for new results and the number of **Hours Back** for each module to display New Results. For new users the New Results module will be automatically set to default to 72 hours back for all available modules. The results are considered new based on your New Results module preference settings.

To set the amount of time that determines if a result is flagged as new:

1. Click the **Preferences** button in the New Results header.



2. From the New Results Module Preferences window, select how many hours you want to go back for a result to be flagged as new. You can go back 24, 48, and 72 hours from the current date.



If you select **Disabled** in a dropdown, the corresponding module will never flag a result as new and New Results badges will not appear. If you find that you're not seeing new result flags for the patient's record, make sure the Hours Back is not set to Disabled. You also have the option of customizing how the New Results display in the module by defining the **Sort By** and the **Sort Direction**.

3. Click the **Save & Apply** button once you have selected the number of hours back for flagging new results.

Notification Subscriptions for New Results

Show Me Ask a Question

Authorized users with full web access to ClinicalConnect 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 at select organizations who are set up to launch ClinicalConnect only from their clinical information system (called Contextual Launch Only/Restricted Contextual Launch).

Notifications can be set up for each patient individually, at the module level and for a preferred frequency. The Lab module notifications can be further customized to send emails only if the results are abnormal. You can add your preferred email address where you'll receive new result notifications for the patients that you have subscribed to.

These real-time email notifications may be useful in various clinical settings, supporting clinical workflows where clinicians may be waiting for hospital-based results for their patients in order to make a clinical decision or to provide follow-up care.

Important Notes: Understanding How New Result Notifications Work

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 as described in the New Results section of this guide 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.

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.

It is also important to be aware that 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".

Note: In some cases, Hospitals may not flag new results for all modules. 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).

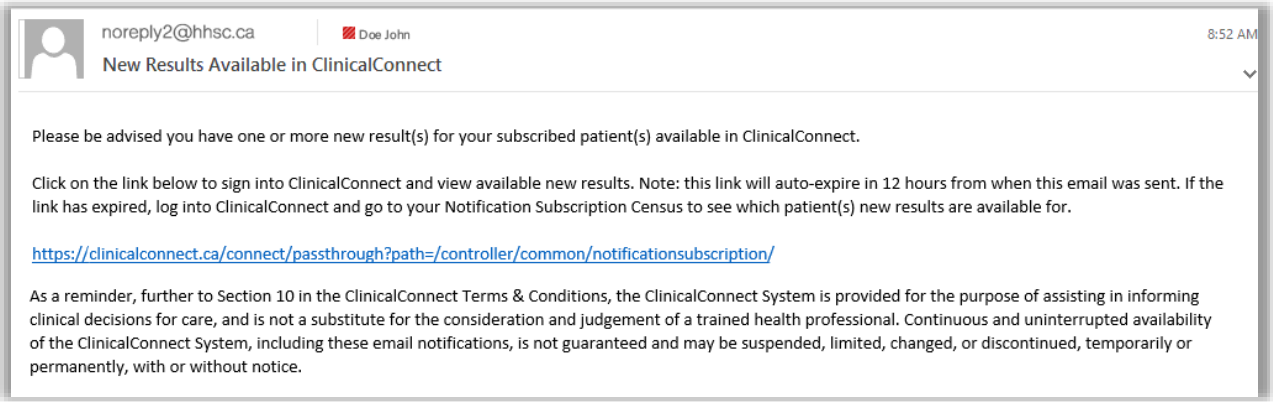
Notification Subscription Email

You will receive email notifications from ClinicalConnect alerting you of new results for the patients that you have subscribed for and based on your defined frequency and the modules you selected for each patient.

The email notification details will not contain any Personal Health Information (PHI) for the patients you've subscribed but will include a generic link that will launch the ClinicalConnect log in page, requiring you to log into ClinicalConnect first before accessing your Subscription Notification list of patients to view the available new results.

ClinicalConnect will aggregate any new results available for each subscribed patient and will send one email notification for all patients based on your defined frequency value, rather than sending multiple emails for each new result.

This is an example of the email notification you'll receive.


noreply2@hhsc.ca Doe John 8:52 AM

New Results Available in ClinicalConnect

Please be advised you have one or more new result(s) for your subscribed patient(s) available in ClinicalConnect.

Click on the link below to sign into ClinicalConnect and view available new results. Note: this link will auto-expire in 12 hours from when this email was sent. If the link has expired, log into ClinicalConnect and go to your Notification Subscription Census to see which patient(s) new results are available for.

https://clinicalconnect.ca/connect/passthrough?path=/controller/common/notificationsubscription/

As a reminder, further to Section 10 in the ClinicalConnect Terms & Conditions, the ClinicalConnect System is provided for the purpose of assisting in informing clinical decisions for care, and is not a substitute for the consideration and judgement of a trained health professional. Continuous and uninterrupted availability of the ClinicalConnect System, including these email notifications, is not guaranteed and may be suspended, limited, changed, or discontinued, temporarily or permanently, with or without notice.

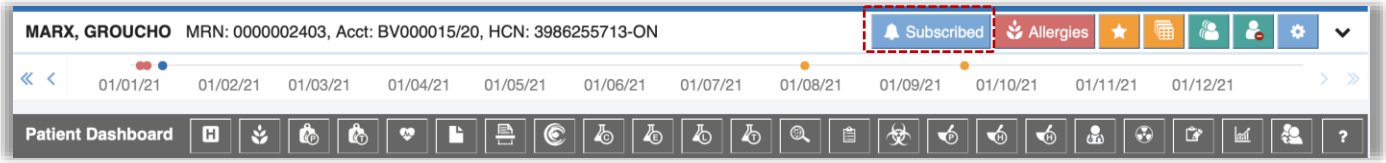
The link will auto-expire in 12 hours from when the email was sent. The following message will display in the header if the link is expired:

The New Results notification link has expired. Please select Notifications Subscriptions census to view patient new results or reinitiate the email verification process if applicable.

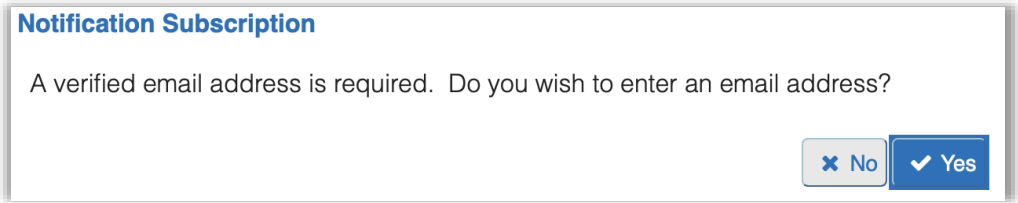
You can still review your patients New Results by accessing their record.

How to Set Up a Notification Subscription

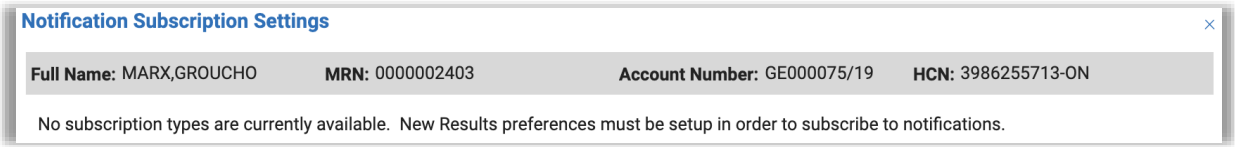
1. Patients who you have not yet subscribed to receive notifications will display the **Not Subscribed** button located in the patient header.
   To subscribe to this patient, click the **Not Subscribed** button.



2. When setting up a Notification Subscription for the first time, you will be prompted to add and verify your email address before you can continue to set up your notification preferences for the patient you selected and ClinicalConnect will prompt you to complete this as shown below.
   Click **Yes** to setup your notification subscription preferences.



You must have at least one module enabled for New Results flags to be able to complete the next step in your Notification Subscriptions. If you have no modules enabled for New Results then the message shown below will display when clicking the **Not Subscribed** button, reminding you to enable this in the **New Results module** preference settings.

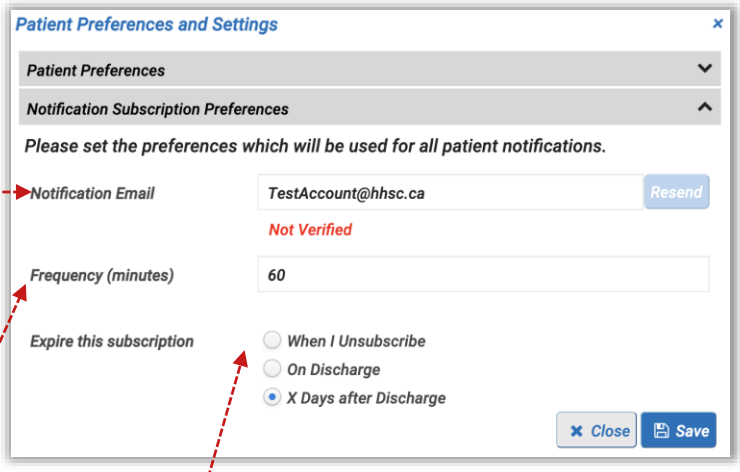


To enable your New Results click the **Preferences** button in the New Results module and modify your preferences or change your New Results preferences using **Step 8 of the** Preference Setup Wizard.

3. If this is your first subscription, you will need to define your general **Notification Subscription Preferences**, such as your email, your notification frequency and expiry. These general preference settings will apply to all notifications for all patients that you subscribe to.
   If you have previously already set your notification preferences, you will not need to complete this step.

Notification Email - Add your preferred email address where you would like to receive the New Result notifications. Ensure you enter your email address correctly so that the notifications can be delivered. If your email address has not be verified, it will be labelled as **Not Verified** under the email address field and you must verify your email first before you can set up your notifications. A verification email will be sent to the email address that you entered. If you have not received a verification email at your expected email address, click the **Resend** button.

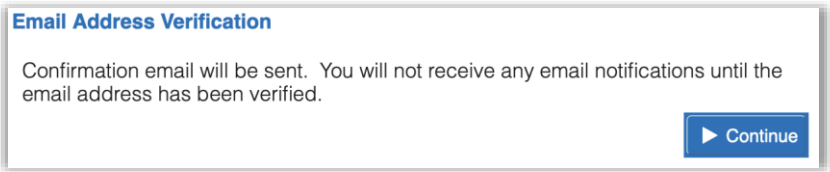
Frequency (minutes) - Define how often you wish to receive New Result notifications. Based on the minute value added in this field, ClinicalConnect will aggregate any new results available for all subscribed patients and will send you one email notification.



Expire This Subscription - 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.

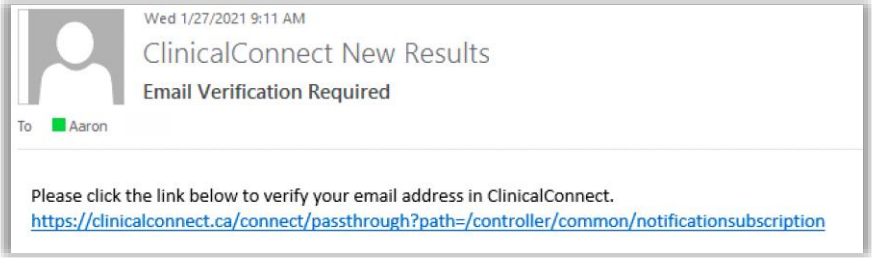
4. After completing this step, which will apply to all notifications for all patients that you have subscribed to, click the **Save** button to move to the next step.

5. A confirmation email will be sent to the email address that you submitted. Click **Continue** to have the email sent to you.



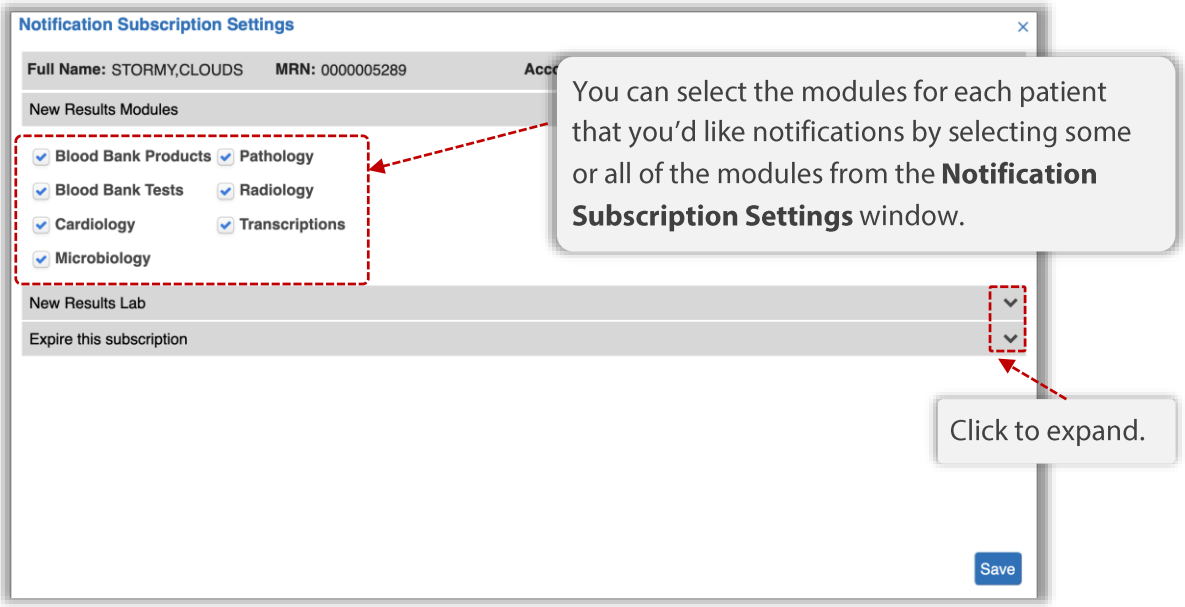
6. A verification email will be sent to the email address that you entered. The link will auto-expire in 12 hours from when the email was sent. To verify your email, click the link provided in the email and log into ClinicalConnect. This will bring you to your default census view and will display the message **Email address is verified.**

You must make sure your email address is verified before you can continue to customize your Notification Subscription settings for any selected patient.



If you did not receive the verification email, please check your email spam filters.

7. You are now ready to select the modules that will apply to the New Result notifications for this patient. Click the **Not Subscribed** Not Subscribed button located in the patient header. This screen allows you to select the notification modules for each individual patient by selecting some or all of the modules from the Notification Subscription Settings window as shown below.

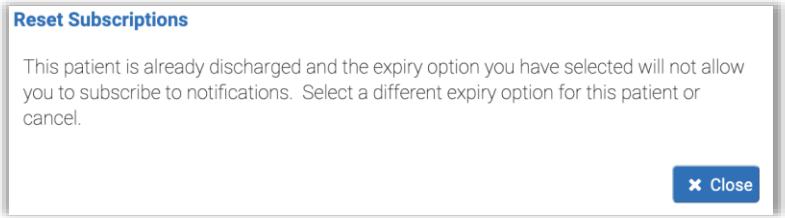


8. The next section is specifically related to Lab notifications. To set up Lab notifications, expand the option for **New Results Lab** then select whether you want to receive an email notification for **ALL** new Lab results or just new **Abnormal** Lab results for this patient.

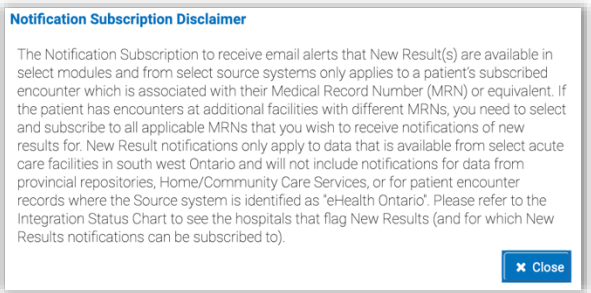
Please review the section called **Important Notes: Understanding How New Result Notifications Work** provided in this guide to ensure you understand the limitations of the new result notifications.

9. The next section is called **Expire this Subscription** and it is used to define when you want this subscription to expired for this specific patient. These are the same expiry values as shown earlier in step 2 and will default to what you selected when you first completed your notification preferences. You have the option to change your subscription expiry by expanding this section and make the changes as needed.

You cannot select **On Discharge** or number of **Days after Discharge** if the patient is already discharged and the following notification will display. You must close the message window and leave the expiry selection to '**When I Unsubscribe**'.



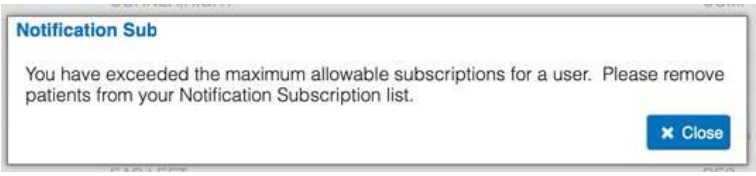
10. Once you're finished setting up the subscription, click the Save button to create the notification subscription.



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

Once you have 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.

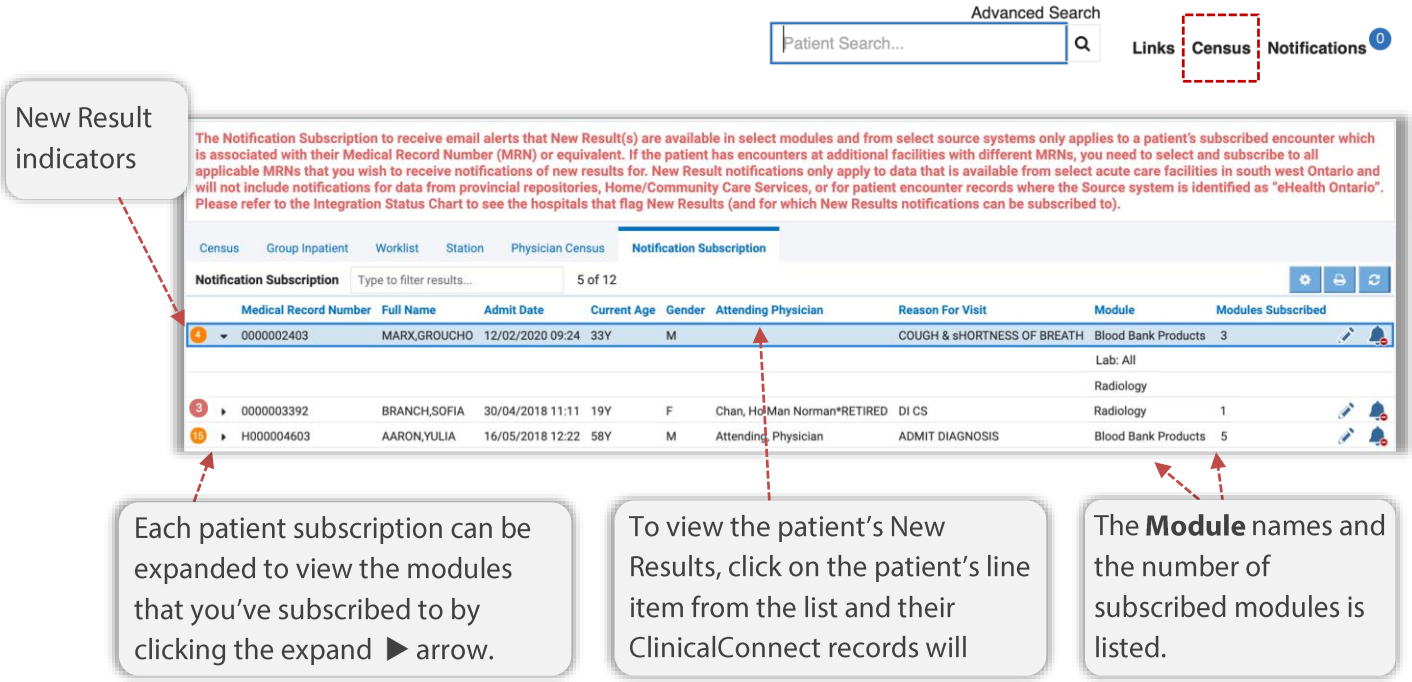
You can only be subscribed to **a maximum of 75 different patient MRNs**. If you try to exceed the maximum number of notification subscriptions, you will receive this message:



Accessing your Notification Subscription List of Patients

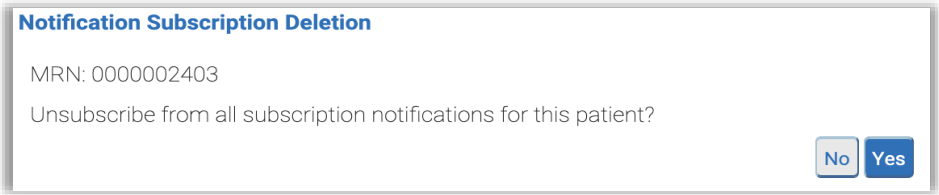
After subscribing to receive notifications for at least one patient, you will be able to access the **Notification Subscription** tab where all of your patients' subscriptions will be listed as shown below. You can easily manage all of these subscriptions from this view or select the patient's record to view their New Results. From this list you can easily select the patient's record to view their New Results or edit/remove the subscriptions as needed.

1. To access the Notification Subscription list when in a patient's record, select the **Census** link from the top of the screen.



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

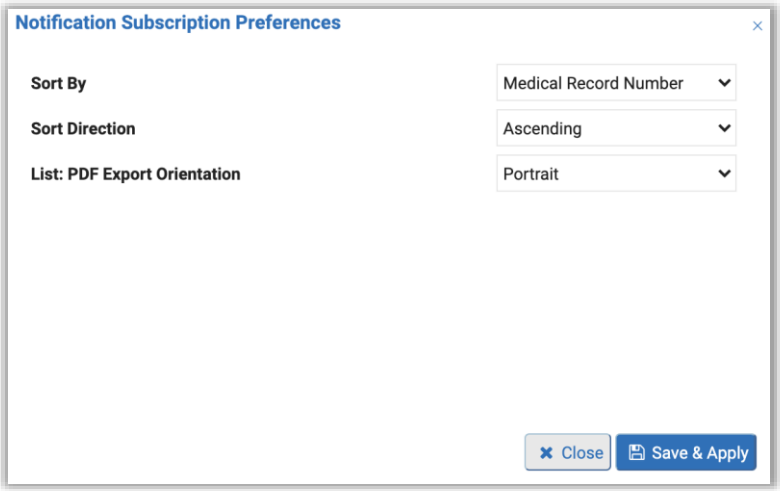
The **Unsubscribe** button will unsubscribe you from receiving email notifications for the selected patient and will display a confirmation message when deleting the subscription as shown below. Verify that you want to unsubscribe from notifications for the selected patient by clicking **Yes.** By clicking **No** you will return to your Notification Subscription list.



After unsubscribing a patient, you will no longer see them listed in your Notification Subscription list and you'll have to click the **Not Subscribed** Not Subscribed button in the patient header to subscribe again.

Notification Subscriptions Tab Preferences

The **Notification Subscriptions** tab has its own set of preferences that can be accessed and configured by clicking the Preferences button in the module header.



After updating your preference settings, click the **Save & Apply** button to save your changes.

To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

Census Lists

Show Me

Ask a Question

ClinicalConnect provides up to five different real-time Census lists (based on the user's privileges) that can be used to easy access patient records and view details related to patients' hospital encounters from acute care facilities in south west Ontario. An additional tab called **'Notification Subscriptions'** is also available in the Census module and provides a list of patients that the user has subscribed to receive email notifications when new results become in the patient's records. Users with census privileges can set their default preferences to the Census list of their choice. Census lists can be used to easily access patient records and view details related to patients' hospital encounters as shown in the example below.

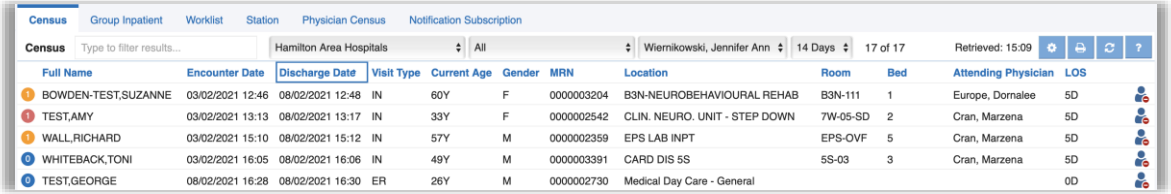
The six different Census lists that present in tabs include:

- Census
- Group Inpatient
- Station
- Worklist
- Physician Census
- Notification Subscriptions

To learn more about each Census list, click on the links above.

The following table provides an overview of the key features of each Census list.

Tab	Description
Census	The first **Census** tab is a combined census list that displays Inpatients, Outpatients, ED patients, and Discharged patients who have had activity in acute care facilities within a defined number of days back (maximum of 14 days back) and also includes patients that have been added to your Worklist. For physician users, this census list will list patients that have a hospital registration and are associated with the physician, based on the physician's CPSO number. Other users with census privileges (e.g. nurse practitioners) may also have a list of patients from select hospitals depending on whether the hospital has the necessary ClinicalConnect compatible mechanisms and processes in place to link those users to specific patients. For non-physician users, if the user is associated with multiple physicians' CPSO numbers, this census list includes patients that are on your selected Physician Census list and anyone that you have added to your Worklist.

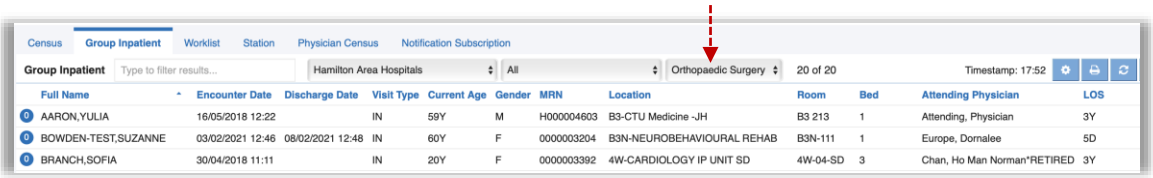


Group Inpatient

Group Inpatient census is used for select physician groups and displays all inpatients associated with the group of physicians based on the physician's CPSO number. These physician groups are defined within the source Health Information System (HIS) and are available for select source hospitals systems. This list is useful for physicians that are covering for a specific physician group within that source hospital system. If the user is not associated with Group Inpatients, this census list will not display.

User's accounts that are configured to support multiple physicians (such as physician's administrative support) will have an additional Physician field and will be able to filter this list by selecting the physician's name, to see only the patient's associated with the selected physician.

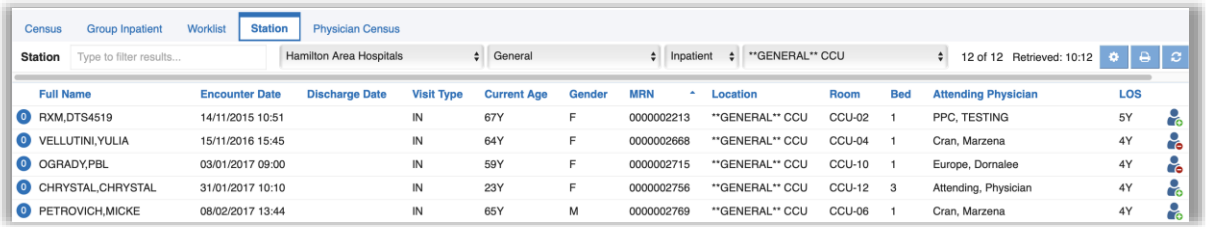
Physician groups are defined within the source HIS and may be available only for select source hospitals. This list is useful for physicians that are covering for a specific physician group within that source hospital system.



Station Census

The Station census, or Unit/Ward census, displays all inpatients and outpatients associated with the selected hospital facility and location type. The list of patients will display for the selected location for the current date.

Note: Not all facilities have Station Census lists available. In these cases, use the Advanced Search function to find the patient in ClinicalConnect.



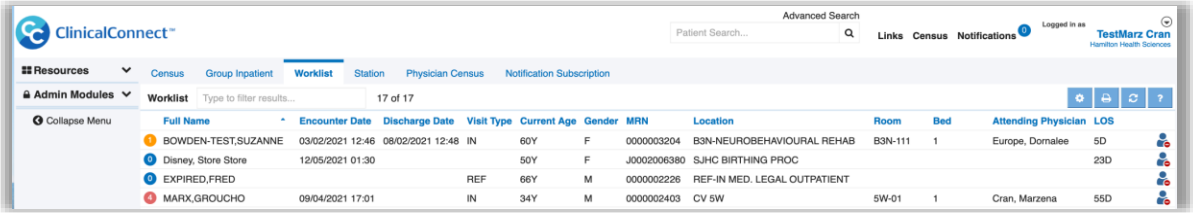
Worklist

A Worklist is useful if you want to create your own patient list. This eliminates the need to always search for a patient each time you want to access their record. The Worklist will

display a list of patients that the user has manually added by clicking the **Add button** . Click the **Remove button** to remove patients from your Worklist as needed.

The Worklist census is limited to 75 patients.

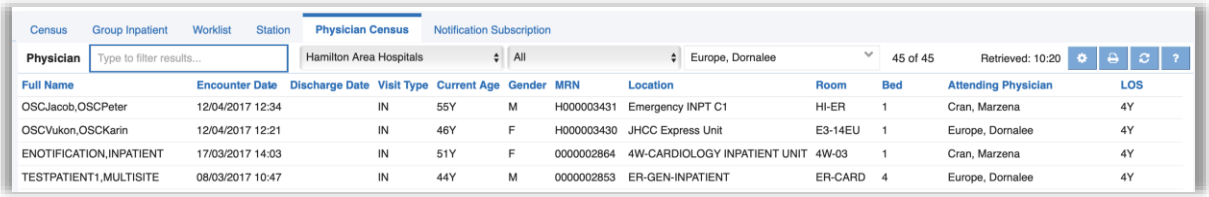
Note: Patients who've been matched only against PCR cannot be added to a Worklist (i.e. the "Add Pt to Worklist" icon will not be available. These patients' records will need to be searched each time if they haven't had a SWO hospital/HCC visit. The most efficient way to search for these records is by using the HCN.) Please refer to the section called 'ClinicalConnect's Integration with Provincial Client Registry (PCR)' for more information.



Physician Census

Displays a list of all inpatients associated with the physician's CPSO number. Other users with census privileges (e.g. nurse practitioners) may also have a list of patients from select hospitals depending on whether the hospital has the necessary ClinicalConnect compatible mechanisms and processes in place to link those users to specific patients. For non-physician users, this census will display the selected physician's patients. If the user is associated with multiple physicians, use the dropdown to select a different physician and display a new patient list.

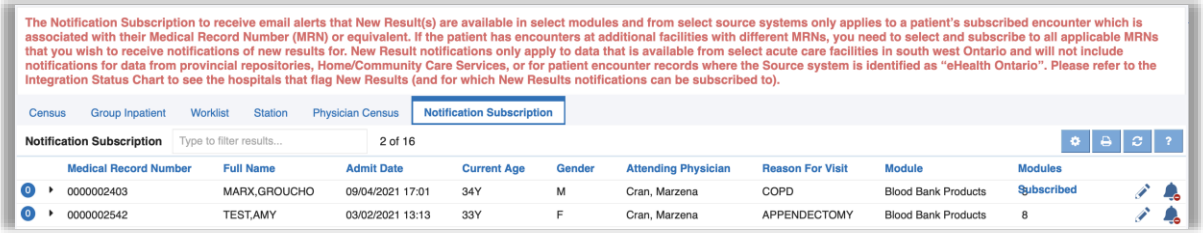
Physician's Census lists may not be available from all hospitals. In these cases, use the Search function to find the patient's record in ClinicalConnect.
Note: In some cases, NPs with hospital privileges may be listed in the physician's list and if selected, will see their associated patients listed.



Notification Subscription

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. You can easily manage all of these subscriptions from this view or select the patient's record to view their New Results. See the Notification Subscription and Accessing your Notification Subscription List of Patients section of the guide to learn more.

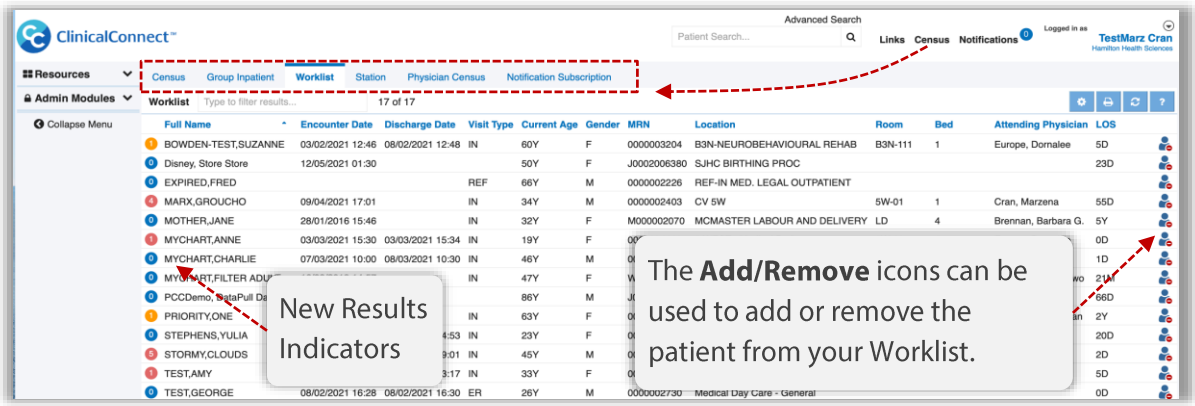
NOTE: The Subscription Notification list cannot be set as your default Census view. Instead, click on the Subscription Notification tab to view the list.



Common Census List Functionality

A default Census list is set to display for users with census privileges when first logging into ClinicalConnect. Once in a patient's record, users can access their default Census list by clicking the **Census** link located at the top of the screen.

To access a patient's record from a Census list, click the row of the patient whose record you want to view.



The following table provides a summary of key features of Census lists in ClinicalConnect.

Feature	Summary
Smart Filter	Text typed in the Smart Filter **Search** box narrows the list of results to display only those related to text you entered. Example: Worklist Type to filter results...
Source and Facility	Select Census lists can be sorted/filtered by selecting the **Source** hospital system from the dropdown list and then selecting the associated facilities. After selecting the Source, use the **Facility** dropdown list to drill down on a specific facility you want to use to filter your census list.

	The All option is available in the Facilities dropdown to search all facilities in the selected source hospital. Example: Hamilton Area Hospitals / Juravinski Cancer Center
Days Back	In the Census lists, the **Days Back** filter refers to the number of days back from the current date and is set to the maximum of 14 days as the default. This will display a cumulative list of patients who have had activity in acute care settings for the selected number of days. Days Back options include; Today, 1, 3, 7, 14
Print	All Census lists can be printed using the print icon
Preferences	All Census tab have preferences that can be accessed and configured by clicking the Preferences button in the census header.
New Results Flags	Coloured flag indicators display in census lists (as well as beside the modules in a patient's record) alerting you when New Results exist for a patient. Hovering your cursor over the indicator will display a tooltip showing which modules have new results. Example: Groucho Marx has three new lab results to view. 3 W000002017 MARX,GROUCHO Lab 3 0 000000000 PATAKY, KEITH See the New Results section of the guide to learn more about New Results flags.
Add/Remove Patients to Worklist	Patients can be added or removed from a Census list by using the Add and Remove buttons.

Provincial Client Registry (PCR) Patient Matches and Census Lists

Provider Census lists – Patients who've been matched only against PCR (e.g. showing **eHealth Ontario** in the Facility and Source columns) will not be included in the Provider Census Lists (i.e. these patients' records will need to be searched each time if they haven't had a SWO hospital/HCC visit. The most efficient way to search for these records is by using the HCN.

Simple Search is valid for the following formats. Name (last, first - or partial first), HCN, MRN

Search | Type to filter results... | 2 of 2 | Timestamp: 16:08

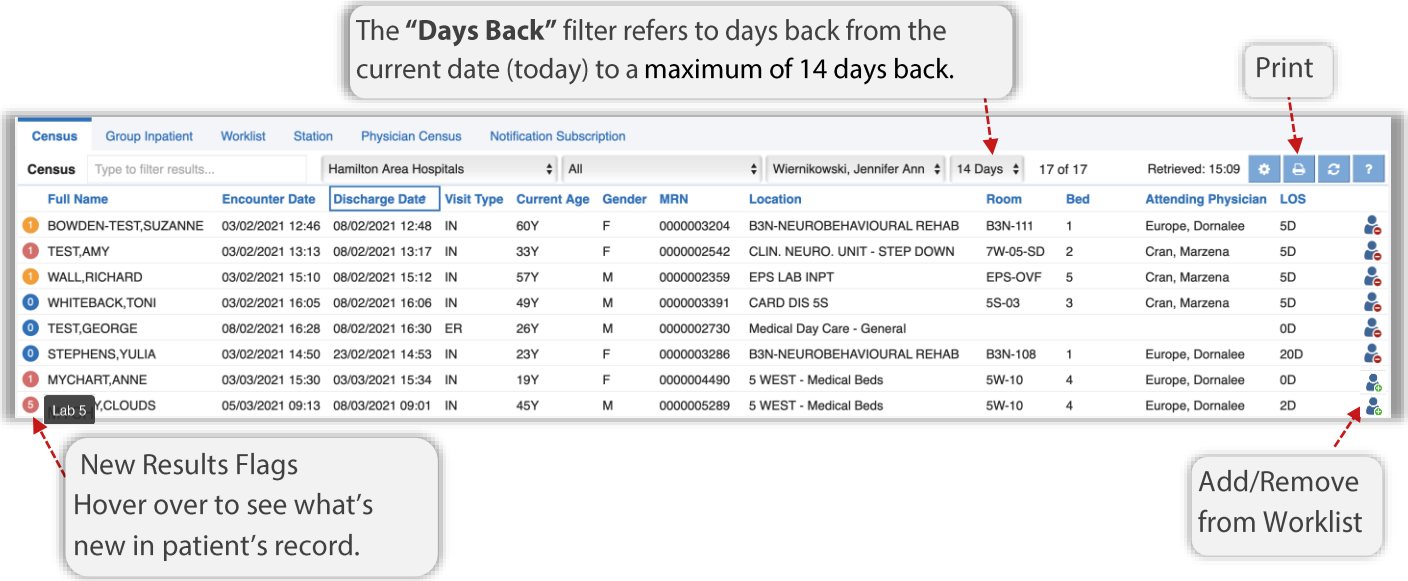
Search criteria: 9708718987

MRN	Full Name	Encounter Date	Account Number	DOB	HCN	Location	Room	Bed	Attending Physician	Facility	Source
	LIVSEY,ELLENOR			23/12/1922	9708718987					eHealth Ontario	eHealth Ontario

Patients whose records are only viewable due to PCR integration (with no hospital/HCC visit in south west Ontario) cannot be added to Census List or Worklist, and will not display the "Add Pt to Worklist" icon. These patients' records will need to be searched each time they need to be viewed. The most efficient way to search for these records is by using the HCN.

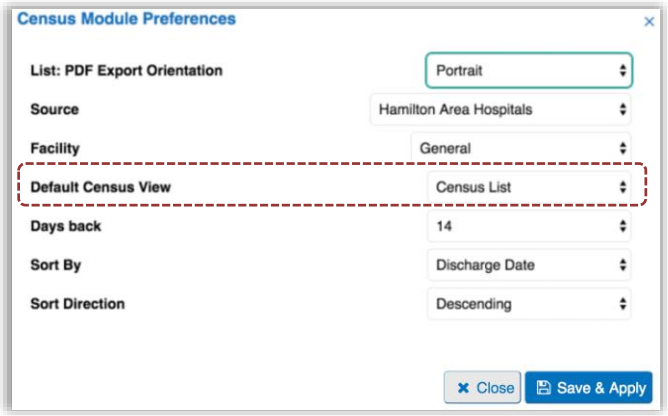
Census List

The Census tab displays a list of patients that have acute care activity, based on the selected source hospital system and the number of days back from the current date. Clicking any of the column headings will re-sort the list in ascending or descending order (alphabetically or numerically).



Census Tab Preferences

The Census tab has its own set of preferences that can be accessed and configured by clicking the Preferences button in the census header. You can also change your **Default Census View** by selecting the options from the dropdown list.



After updating your preference settings, click the **Save & Apply** button to save your changes.

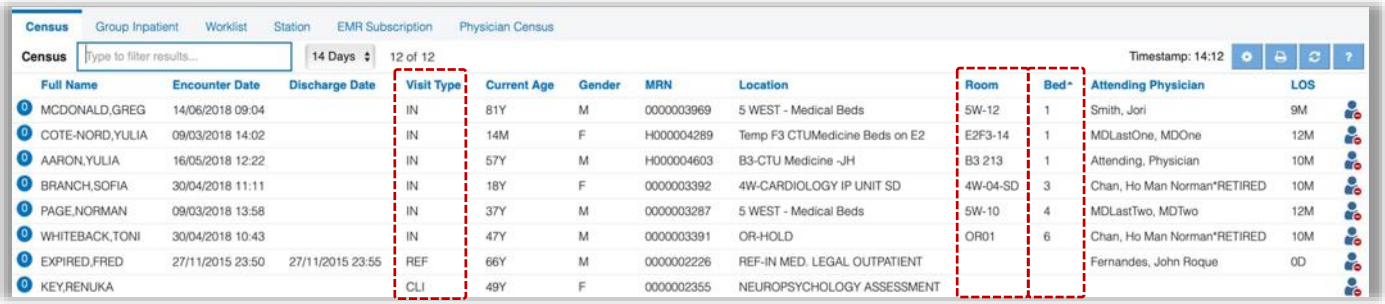
To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

How to generate an Inpatient Census from the Census tab

Sorting your Census by Column

You can sort the Census list by the Visit type column to group together all inpatient visits.
To sort your list by Visit Type:

1. Click the **Visit Type** column header.
2. Scroll through your list and look for any patients that have **I** or **IN** listed in the Visit Type column. This would indicate they had an inpatient visit and my still be in hospital if there is no discharge date showing in the column.



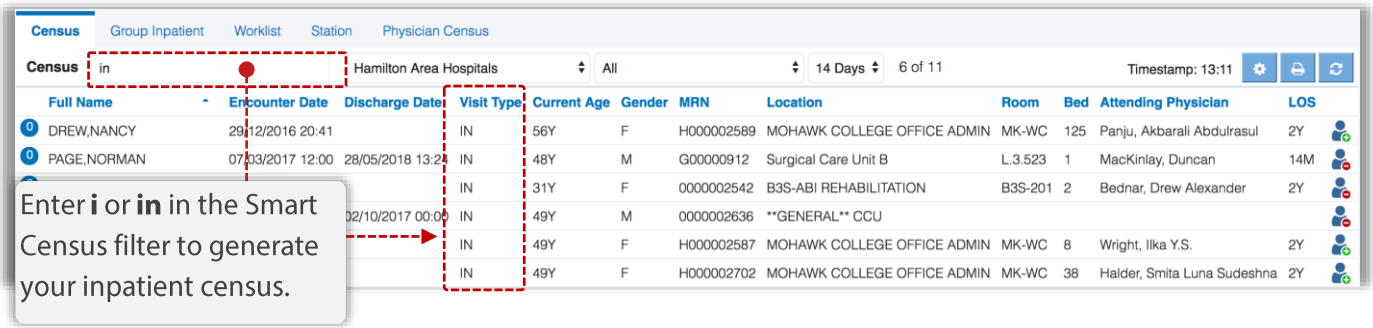
Full Name	Encounter Date	Discharge Date	Visit Type	Current Age	Gender	MRN	Location	Room	Bed	Attending Physician	LOS
MCDONALD,GREG	14/06/2018 09:04		IN	81Y	M	0000003969	5 WEST - Medical Beds	5W-12	1	Smith, Jori	9M
COTE-NORD,YULIA	09/03/2018 14:02		IN	14M	F	H000004289	Temp F3 CTUMedicine Beds on E2	E2F3-14	1	MDLastOne, MDOne	12M
AARON,YULIA	16/05/2018 12:22		IN	57Y	M	H000004603	B3-CTU Medicine -JH	B3 213	1	Attending, Physician	10M
BRANCH,SOFIA	30/04/2018 11:11		IN	18Y	F	0000003392	4W-CARDIOLOGY IP UNIT SD	4W-04-SD	3	Chan, Ho Man Norman*RETIRED	10M
PAGE,NORMAN	09/03/2018 13:58		IN	37Y	M	0000003287	5 WEST - Medical Beds	5W-10	4	MDLastTwo, MDTwo	12M
WHITEBACK,TONI	30/04/2018 10:43		IN	47Y	M	0000003391	OR-HOLD	OR01	6	Chan, Ho Man Norman*RETIRED	10M
EXPIRED,FRED	27/11/2015 23:50	27/11/2015 23:55	REF	66Y	M	0000002226	REF-IN MED. LEGAL OUTPATIENT			Fernandes, John Roque	0D
KEY,RENUKA			CLI	49Y	F	0000002355	NEUROPSYCHOLOGY ASSESSMENT				

Smart Census Filter

You can also use the Smart Census filter to only list inpatient encounters.

To filter using the Smart Census:

1. Enter **in** or **i** in the Smart Census filter.
2. Scroll through your list and look for any patients that have **I** or **IN** listed in the Visit Type column. This would indicate they had an inpatient visit.



Full Name	Encounter Date	Discharge Date	Visit Type	Current Age	Gender	MRN	Location	Room	Bed	Attending Physician	LOS
DREW,NANCY	29/12/2016 20:41		IN	56Y	F	H000002589	MOHAWK COLLEGE OFFICE ADMIN	MK-WC	125	Panju, Akbarali Abdulrasul	2Y
PAGE,NORMAN	07/03/2017 12:00	28/05/2018 13:24	IN	48Y	M	G00000912	Surgical Care Unit B	L.3.523	1	MacKinlay, Duncan	14M
			IN	31Y	F	0000002542	B3S-ABI REHABILITATION	B3S-201	2	Bednar, Drew Alexander	2Y
		02/10/2017 00:00	IN	49Y	M	0000002636	**GENERAL** CCU				
			IN	49Y	F	H000002587	MOHAWK COLLEGE OFFICE ADMIN	MK-WC	8	Wright, Ilka Y.S.	2Y
			IN	49Y	F	H000002702	MOHAWK COLLEGE OFFICE ADMIN	MK-WC	38	Halder, Smita Luna Sudeshna	2Y

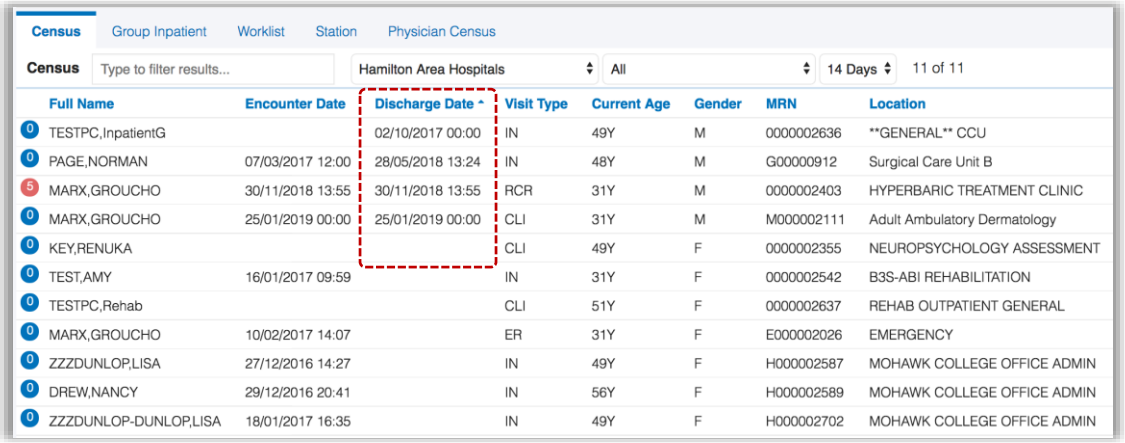
If any other entry in the Census grid starts with in or i, you will see those results also, even if they're actually inpatient encounters. Always make sure you verify your filtered results by looking at the contents of the Visit Type column.

How to generate a Discharged Patient Census list

Discharge Census lists are helpful for family health teams where there is a need to review when patients were discharged from source hospital systems. The lists displays discharged patients associated with the assigned physician to a maximum of 14 days back.

To create your Discharge Census list:

1. Click the **Discharge Date** column header.
2. Your patient list is now sorted by discharge date with the most recently discharged patient showing at the top of the list.



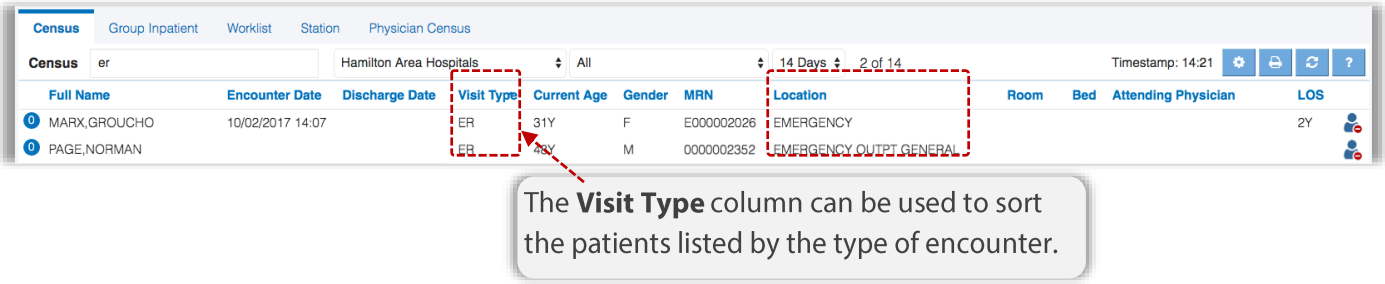
Full Name	Encounter Date	Discharge Date	Visit Type	Current Age	Gender	MRN	Location
TESTPC,InpatientG		02/10/2017 00:00	IN	49Y	M	0000002636	**GENERAL** CCU
PAGE,NORMAN	07/03/2017 12:00	28/05/2018 13:24	IN	48Y	M	G00000912	Surgical Care Unit B
MARX,GROUCHO	30/11/2018 13:55	30/11/2018 13:55	RCR	31Y	M	0000002403	HYPERBARIC TREATMENT CLINIC
MARX,GROUCHO	25/01/2019 00:00	25/01/2019 00:00	CLI	31Y	M	M000002111	Adult Ambulatory Dermatology
KEY,RENUKA			CLI	49Y	F	0000002355	NEUROPSYCHOLOGY ASSESSMENT
TEST,AMY	16/01/2017 09:59		IN	31Y	F	0000002542	B3S-ABI REHABILITATION
TESTPC,Rehab			CLI	51Y	F	0000002637	REHAB OUTPATIENT GENERAL
MARX,GROUCHO	10/02/2017 14:07		ER	31Y	F	E000002026	EMERGENCY
ZZZDUNLOP,LISA	27/12/2016 14:27		IN	49Y	F	H000002587	MOHAWK COLLEGE OFFICE ADMIN
DREW,NANCY	29/12/2016 20:41		IN	56Y	F	H000002589	MOHAWK COLLEGE OFFICE ADMIN
ZZZDUNLOP-DUNLOP,LISA	18/01/2017 16:35		IN	49Y	F	H000002702	MOHAWK COLLEGE OFFICE ADMIN

How to sort the Census List by Emergency Department (ED) Visits

An ED Census list can be created to display a list of patients in the Emergency Department associated with the selected source and facility. List displays for a maximum of 14 days back.

Not all facilities listed may have an Emergency Department.

Click on the **Visit Type** column to sort the Census list by the type of encounter. Any patients that have **E** or **ED** listed in the Visit Type column indicates they have an Emergency Department encounter. You can also check the **Location** column for more information as shown below.



Full Name	Encounter Date	Discharge Date	Visit Type	Current Age	Gender	MRN	Location	Room	Bed	Attending Physician	LOS
MARX,GROUCHO	10/02/2017 14:07		ER	31Y	F	E000002026	EMERGENCY				2Y
PAGE,NORMAN			ER	48Y	M	0000002352	EMERGENCY OUTPT GENERAL				

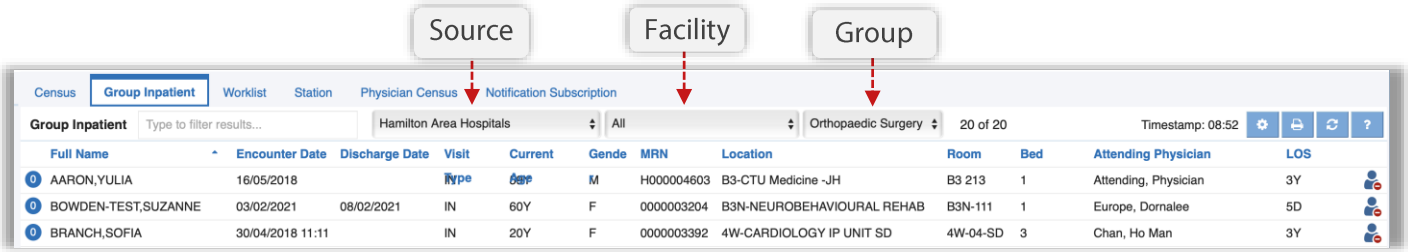
If any other entry in the Census grid starts with **ed** or **e**, you will see those results when you enter **ed** or **e** in the Smart Census filter, even if they're not actually ED encounters. Always make sure you verify your filtered results by looking at the contents of the Visit Type column.

Group Inpatient List

Clicking the **Group Inpatient** tab brings you to the Group Inpatient list.

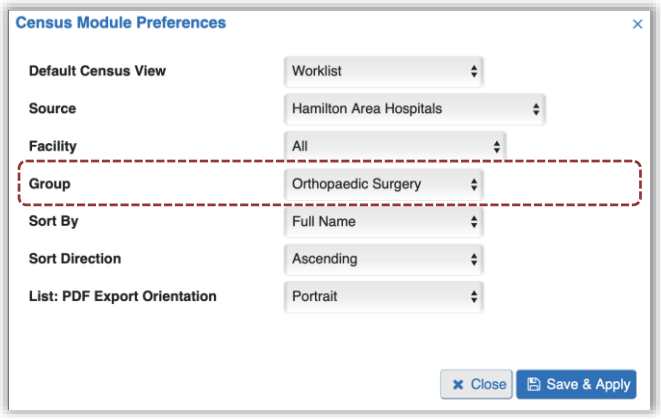
Patients are displayed in a sortable list. Clicking any of the column headings will re-sort the list in ascending or descending order (alphabetically or numerically).

Physician groups are defined within the source Health Information System (HIS) and may be available only for select source hospitals. This list is useful for physicians that are covering for a specific physician group within that source hospital system.



Group Inpatient Tab Preferences

The Group Inpatient tab has its own set of preferences that can be accessed and configured by clicking the Preferences button in the module header. You can also change your **Default Census View** by selecting the options from the dropdown list.



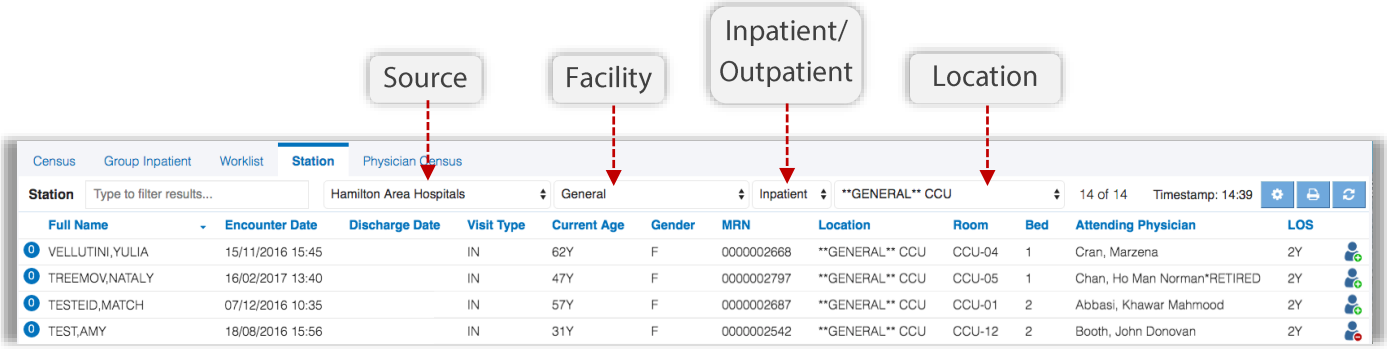
After updating your preference settings, click the **Save & Apply** button to save your changes.

To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

Station Census

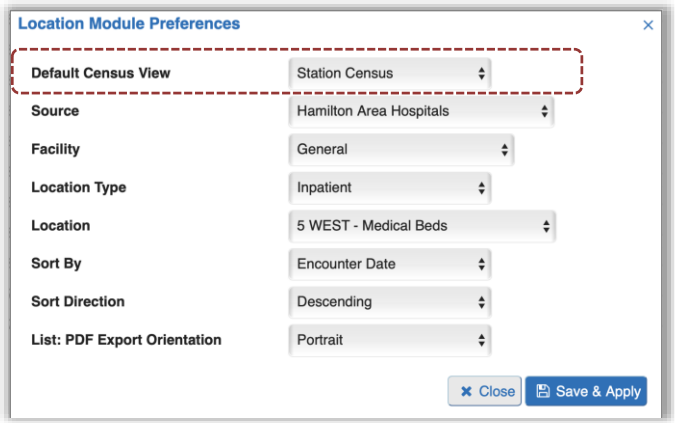
The Station census, or Unit/Ward census, displays all inpatients and outpatients associated with the selected hospital facility and location type. Not all facilities have Station census lists available. In these cases, use the Search functions to find the patient in ClinicalConnect.

Clicking the **Station** tab brings you to the Station census and lists a current list of patients in that location. The list can be sorted by clicking any of the column headings to re-sort the list in ascending or descending order (alphabetically or numerically).



Station Tab Preferences

The Station tab has its own set of preferences that can be accessed and configured by clicking the Preferences button in the module header. You can also change your **Default Census View** by selecting the options from the dropdown list.

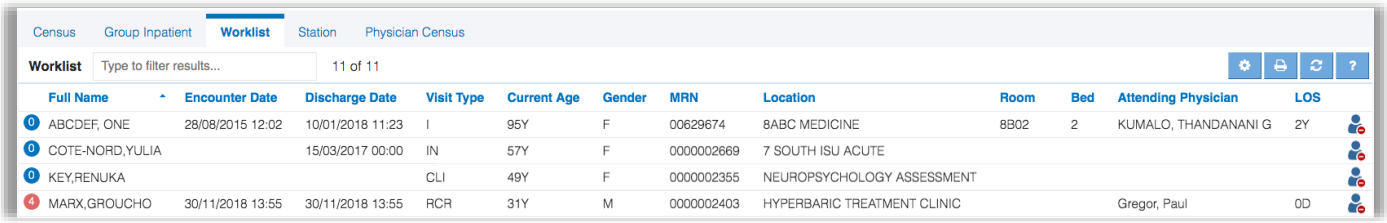


After updating your preference settings, click the **Save & Apply** button to save your changes.

To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

Worklist

The Worklist tab displays a list of patients added manually using the Worklist feature. A Worklist is useful if you want to create your own patient list. This eliminates the need to always search for a patient each time you want to access their record.



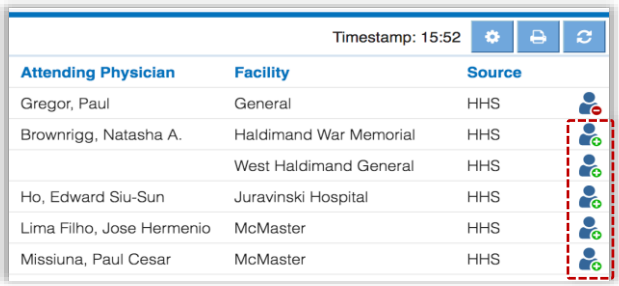
Full Name	Encounter Date	Discharge Date	Visit Type	Current Age	Gender	MRN	Location	Room	Bed	Attending Physician	LOS
ABCDEF, ONE	28/08/2015 12:02	10/01/2018 11:23	I	95Y	F	00629674	8ABC MEDICINE	8B02	2	KUMALO, THANDANANI G	2Y
COTE-NORD,YULIA		15/03/2017 00:00	IN	57Y	F	0000002669	7 SOUTH ISU ACUTE				
KEY,RENUKA			CLI	49Y	F	0000002355	NEUROPSYCHOLOGY ASSESSMENT				
MARX,GROUCHO	30/11/2018 13:55	30/11/2018 13:55	RCR	31Y	M	0000002403	HYPERBARIC TREATMENT CLINIC			Gregor, Paul	0D

Adding a Patient to your Worklist from Patient Search Results or Census Lists

There are a couple ways to can add a patient to your Worklist. You can add a patient to your Worklist from your list of patient search results or from a Census list.

To add a patient to your Worklist:

1. Perform a Simple or Advanced Search, or access one of your Census lists.
2. The **Add Patient icon** appears in the last column of all patient search result or census lists. Click the **Add Patient** icon.

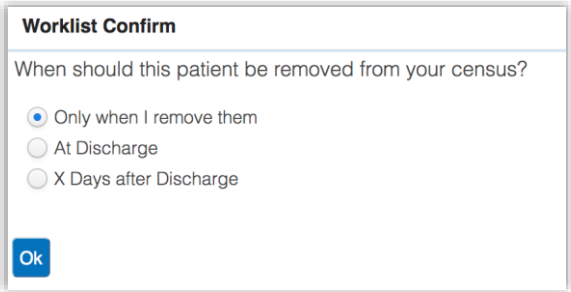


Attending Physician	Facility	Source
Gregor, Paul	General	HHS
Brownrigg, Natasha A.	Haldimand War Memorial	HHS
	West Haldimand General	HHS
Ho, Edward Siu-Sun	Juravinski Hospital	HHS
Lima Filho, Jose Hermenio	McMaster	HHS
Missiuna, Paul Cesar	McMaster	HHS

Make sure you scroll your patient list as far to the right as possible if you are having trouble seeing the **Add Patient** icon.

3. If you are not the provider of record for the patient you're trying to add, you will receive an override message first before you can add the patient to your Worklist. See the Provider of Record Override section of this guide to learn more about patient overrides.

4. From the Worklist Confirm window, select one of the three options to set how long the patient will remain on your Worklist then click the **OK** button.



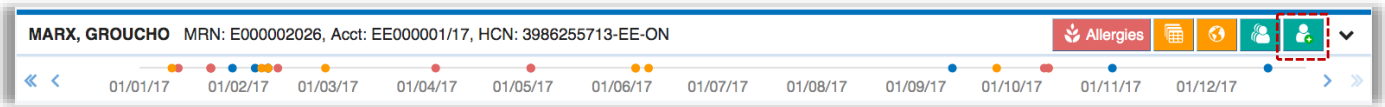
Options include:

- **Only when I remove them** – The patient remains on your Worklist until you manually remove them from the Worklist.
- **At Discharge** – The patient remains on your Worklist until they are discharged.
- **X Days after Discharge** – You stipulate the number of days the patient remains on your Worklist after they are discharged.

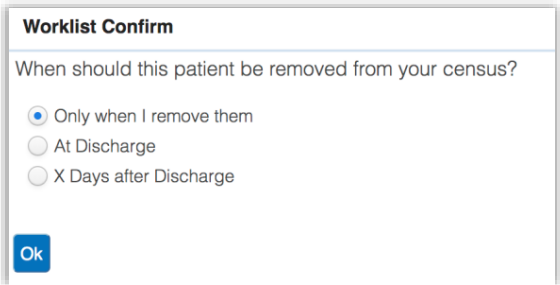
Adding a Patient to your Worklist from the Patient's Record

A second way to add a patient to your Worklist is from the patient's record.

1. To add the patient to your worklist, click the **Add Patient to Worklist** icon in displayed in the patient header.



2. From the Worklist Confirm window, select one of the three options to set how long the patient will remain on your Worklist as described previously, then click the **OK** button.

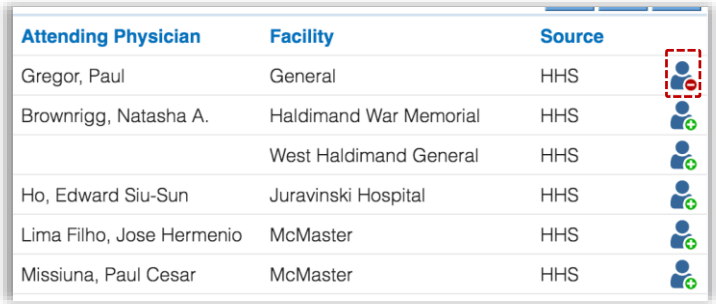


Removing a Patient to your Worklist

You can manually remove patients from your Worklist at any time.

To remove a patient from your Worklist:

1. Access your Worklist from your Census view by clicking Census at the top of your screen then clicking the Worklist tab.
2. The Remove Patient icon is displayed in the last column of the Worklist. Click the **Remove Patient** icon to remove the patient from your Worklist.



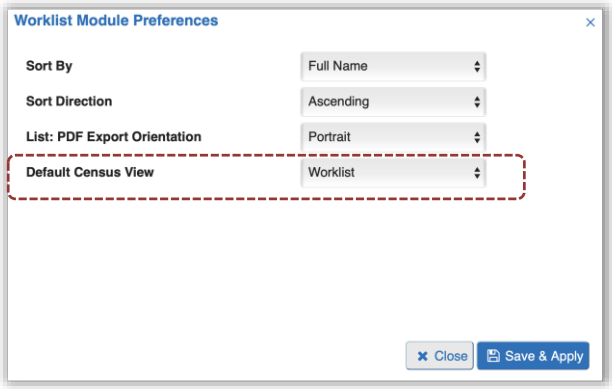
Attending Physician	Facility	Source
Gregor, Paul	General	HHS
Brownrigg, Natasha A.	Haldimand War Memorial	HHS
	West Haldimand General	HHS
Ho, Edward Siu-Sun	Juravinski Hospital	HHS
Lima Filho, Jose Hermenio	McMaster	HHS
Missiuna, Paul Cesar	McMaster	HHS

3. The icon will change to the Add Patient icon indicating the patient is now removed from your Worklist. The next time you refresh your Worklist that patient will no longer appear.

You can also remove the patient from your Worklist if you are in the patient's record by clicking the same **Remove Patient icon** in the header.

Worklist Preferences

The Worklist tab has its own set of preferences that can be accessed and configured by clicking the Preferences button in the module header. You can also change your **Default Census View** by selecting the options from the dropdown list.

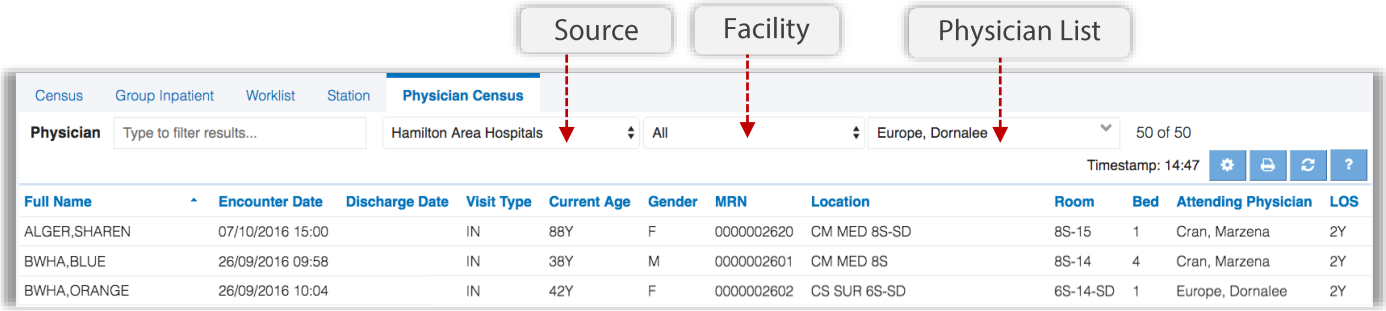


After updating your preference settings, click the **Save & Apply** button to save your changes.

To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

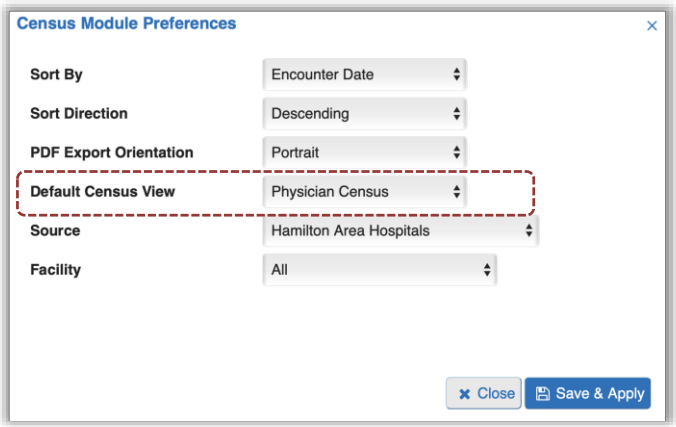
Physician Census List

Users who have configured accounts to support multiple physicians (such as physician's administrative support) will have an additional Physician field in the Physician Census. This census displays a list of inpatients in the selected hospital Source and Facility for the selected physician/user with associated patient lists as shown below. The default physician/user showing in the **Physician List** field is the one associated with your ClinicalConnect profile. You can select a different physician/user from the Physician list to view their specific inpatient list.



Physician Census Tab Preferences

The Physician Census tab has its own set of preferences that can be accessed and configured by clicking the Preferences button in the module header. You can also change your **Default Census View** by selecting the options from the dropdown list.



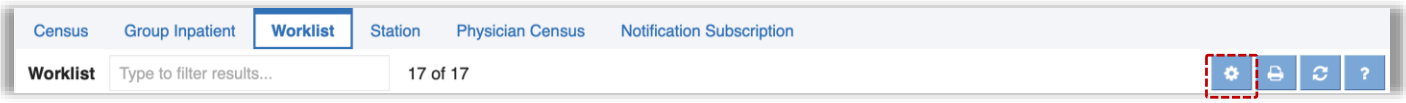
After updating your preference settings, click the **Save & Apply** button to save your changes.

To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

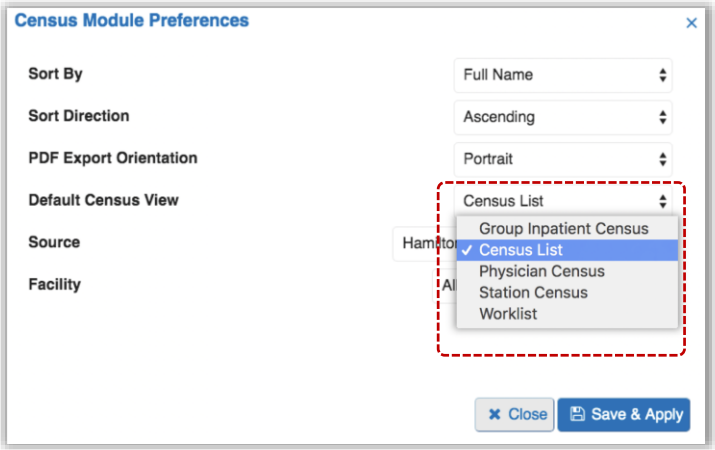
Setting Your Default Census View

This section reviews how to set your default Census view to open to the location that is most appropriate for your workflow when you first log into ClinicalConnect.

1. To quickly configure your default census view, click the **Preferences** button in any of the Census banners.



2. In the **Default Census View**, click the dropdown arrow to display the options then select the Census view you want opened first each time you log into ClinicalConnect.



Examples:

- A physician/authorized user may want to default to the main **Census list tab**, which shows patient lists based on their CPSO number, in addition to any other patients that they've added to their worklist.
- A non-physician user who does not have a CPSO number associated with their account, may want to default to their **Worklist.**

You can change your census default to whichever view you prefer at any time.

3. Click the **Save & Apply** button.

Patient Visit Timeline

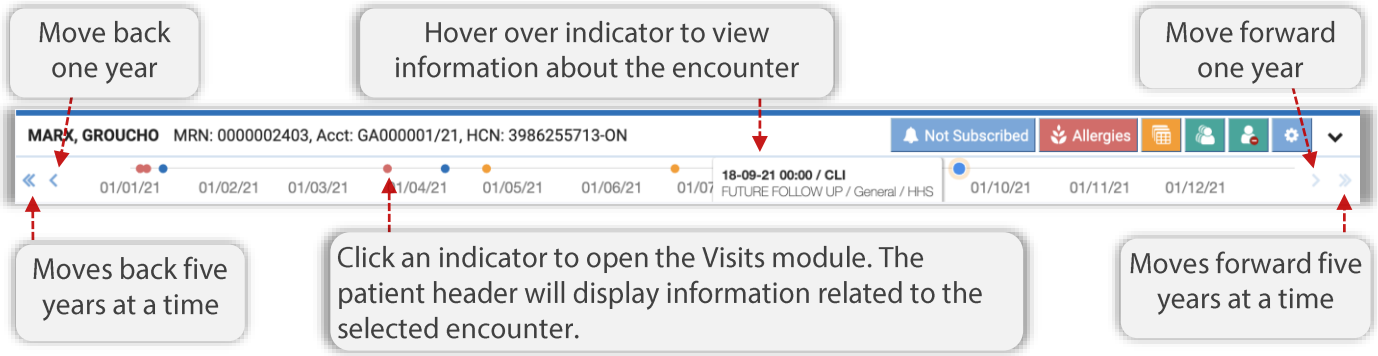
Show Me

Ask a Question

The Patient Visits Timeline is an interactive timeline that provides a visual display of a patient's past and future visit history available from acute care facilities and matches the encounter information listed in the Visits module.

Navigating the Timeline

The timeline defaults to the year associated with the encounter you are currently viewing. The navigation buttons on the timeline allows you to jump back and forth in the timeline.



Coloured indicators on the timeline show the frequency and type of encounter:

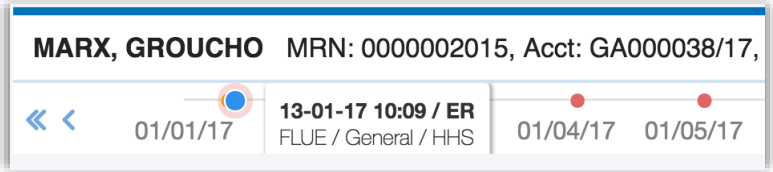
- Red - Emergency Encounters
- Blue - Inpatient Admissions
- Orange - Outpatient Visits (Includes future visits if available from the source systems)

Visit Information

Hovering over a timeline indicator displays a tooltip with the following encounter information:

- Encounter date
- Type of encounter
- Reason for visit
- Facility
- Source

Example: This patient encounter was on Jan 13th, 2017 at 10:09 AM as an ER encounter. FLUE was the reason for the visit at the General facility in HHS.

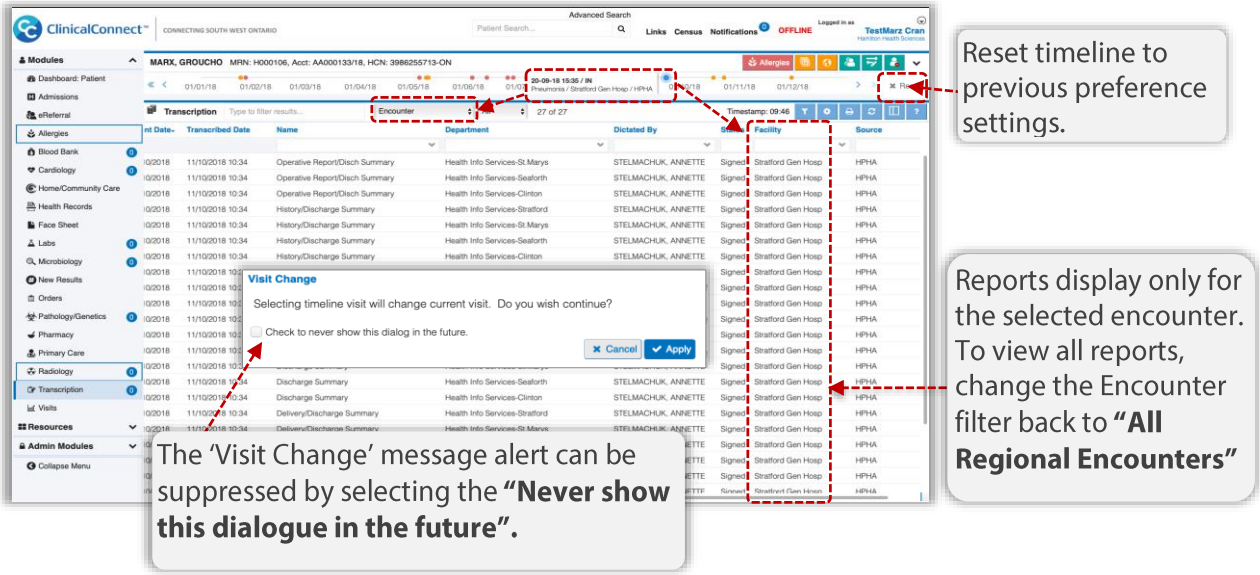


Clicking the indicator will load the Visits module and change the patient header information to display the selected encounter information.

Visits Timeline Interaction

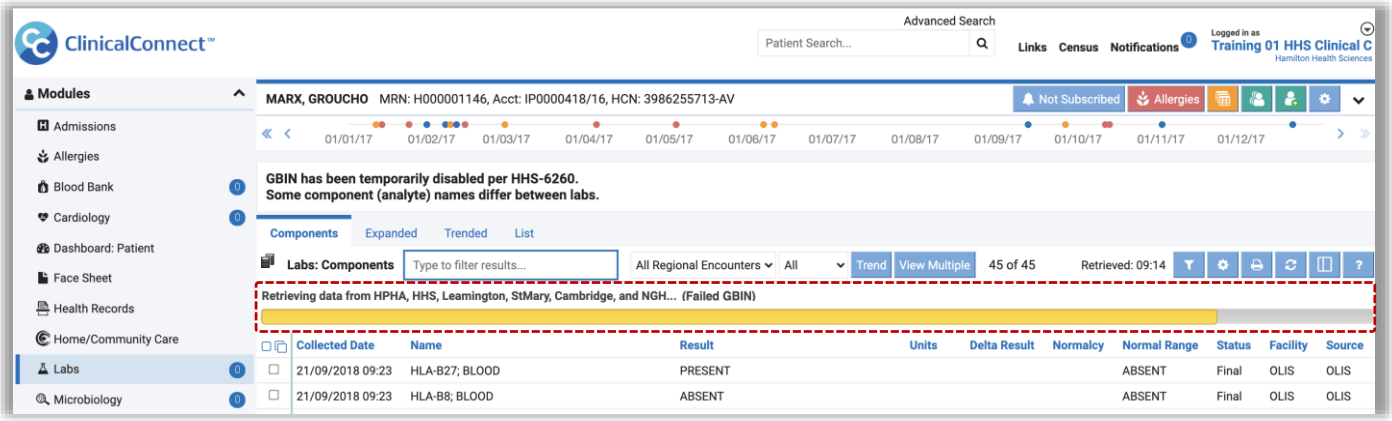
Selecting a visit from the timeline will present with a "Visit Change" alert and if 'Applied', will refresh the module view and only show results for the selected visit/encounter.

Select 'Reset' to reload data to previous preference settings.



Retrieving Data Progress Bar

The retrieving data progress bar shows the progression of data being displayed in the view from the source systems. As data becomes available it is presented in the view and the remaining data being retrieved is shown in the example, along with any failed attempts as shown in the example below for the source GBIN **(Failed GBIN)** .



The **Refresh** button can be clicked at any time to perform the retrieval again and refresh the view with new data if available.

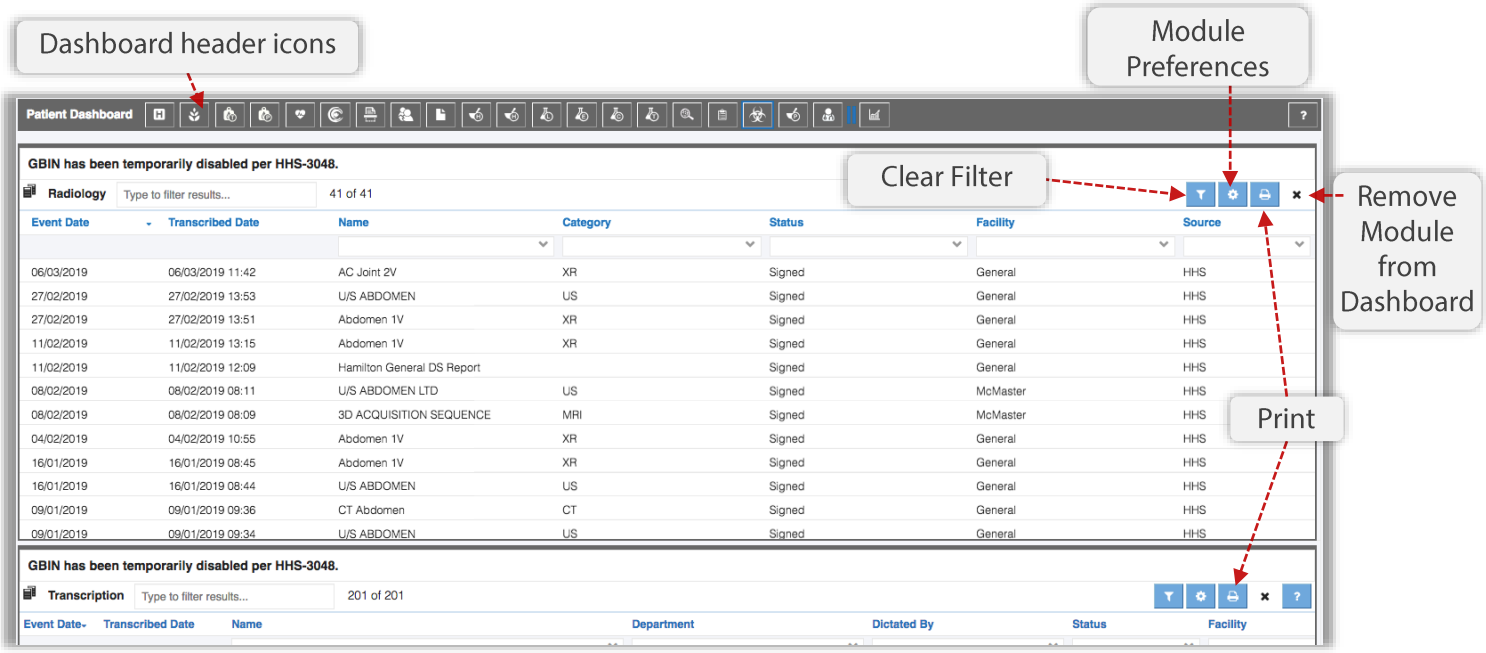
Patient Dashboard

Show Me

Ask a Question

The Patient Dashboard is the first screen that displays when you access a patient's record and is a great tool for creating a single location for displaying data you view on a regular basis.

If you are a first-time ClinicalConnect user, the Dashboard will be empty. You will need to populate the dashboard with clinical modules according to your clinical needs. Drag and drop the module icons found in the Patient Dashboard Header to add modules to your dashboard. The Patient Dashboard can also be accessed at any time by clicking the Dashboard: Patient option from the Clinical Modules menu.



The following table provides a summary of some of the key Dashboard features.

Feature	Summary
Dashboard header icons	Each icon in the Dashboard header represents a clinical module. Dragging a module icon and releasing it below the Dashboard header adds that module to the dashboard view.
Smart Filter	Text typed in the Smart Filter **Search** box narrows the list of results to display only those related to text you entered. Type to filter results...

Feature	Summary
Module Preferences	Used to access to the module's preferences.
Remove Module from Dashboard	Used to remove the module from the Dashboard view.
Column Filter bar	Contains column filters (date and keyword filters) used to filter data to narrow down the information presented in the module's list view. The Clear Filters button is used to reset all Column Filters in the view. See the Column Filter section to learn more about this feature.
Print	Clicking the Print button allows you to print the contents of the selected module.

The buttons that appear in the module headers in the Dashboard do not always match the buttons you will see if you launch the full module from the navigation bar on the left.

Each icon in the Dashboard header represents a clinical module or a specific module tab within a module:

Dashboard Icon	Related Module or Module Tab
	Admissions module
	Allergies module
	Blood Bank: Tests module
	Blood Bank: Products module
	Cardiology module
	Home and Community Care module
	Health Records module
	Face Sheet module
	Pharmacy: Home Meds modules
	Labs: List module
	Labs: Expanded module
	Labs: Components module
	Labs: Trended module
	Microbiology module
	Orders module
	Pathology and Genetics module
	Pharmacy module
	Radiology module
	Visits module

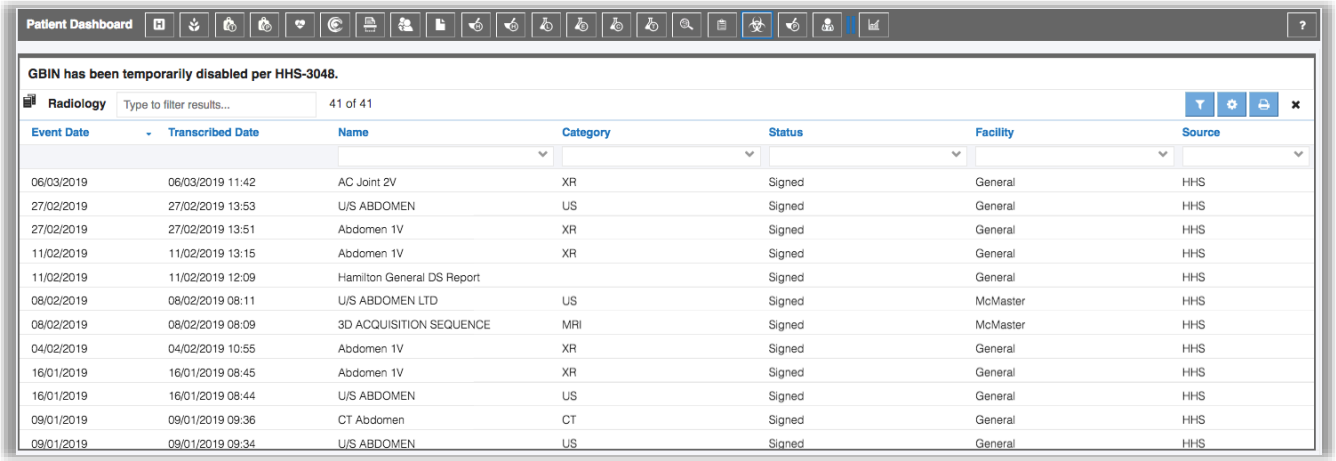
Adding Modules to Your Dashboard

The first time you access the dashboard it'll appear somewhat empty with the exception of the Patient Dashboard header.

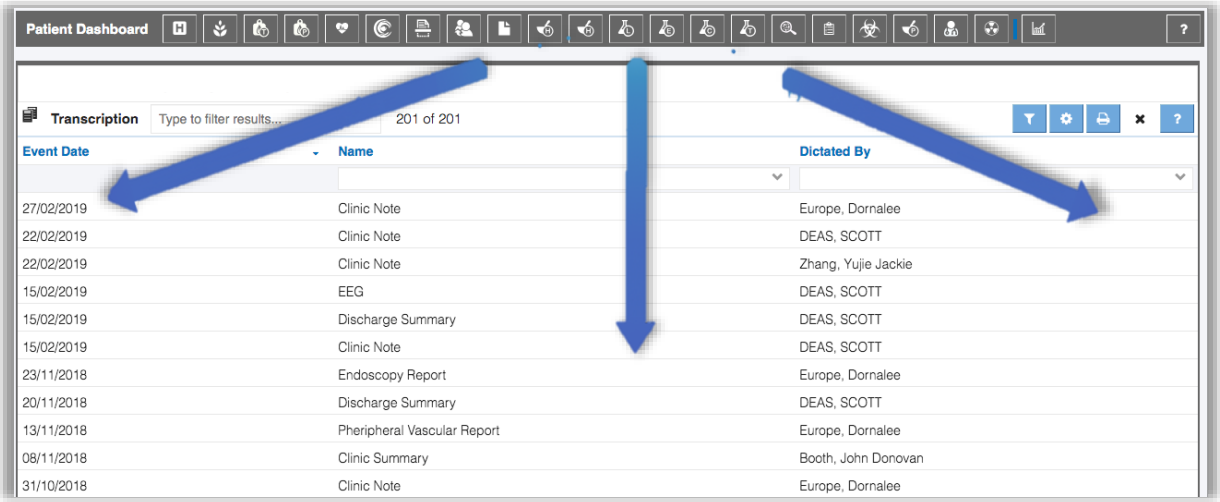
To add modules to your dashboard:

1. Click and drag the icon of the module you want to add to your dashboard and drop it into the space below the Patient Dashboard header.

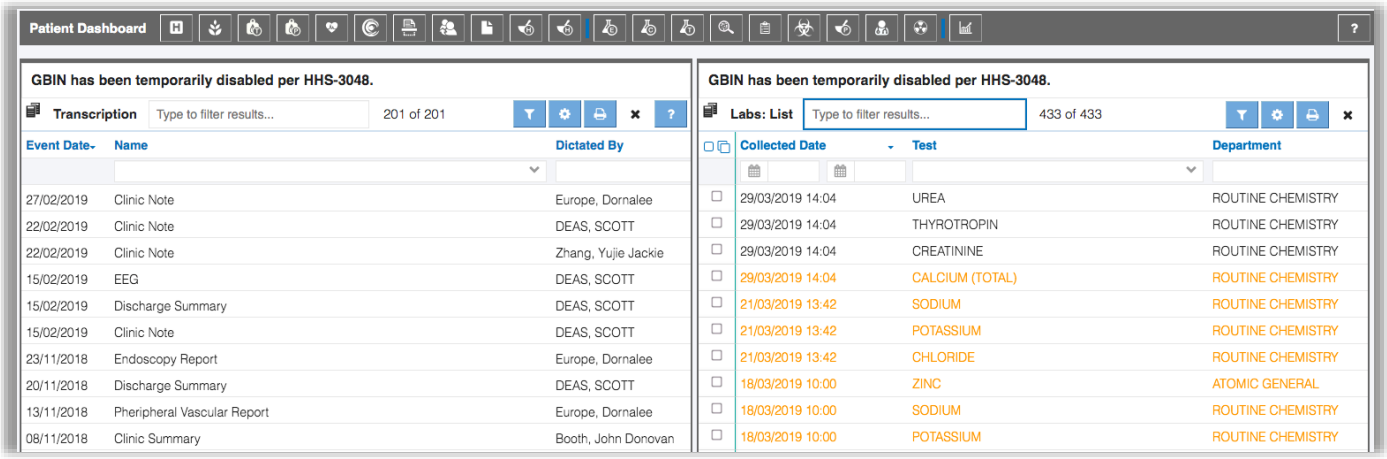
2. The module will display its results based on the module's preferences.



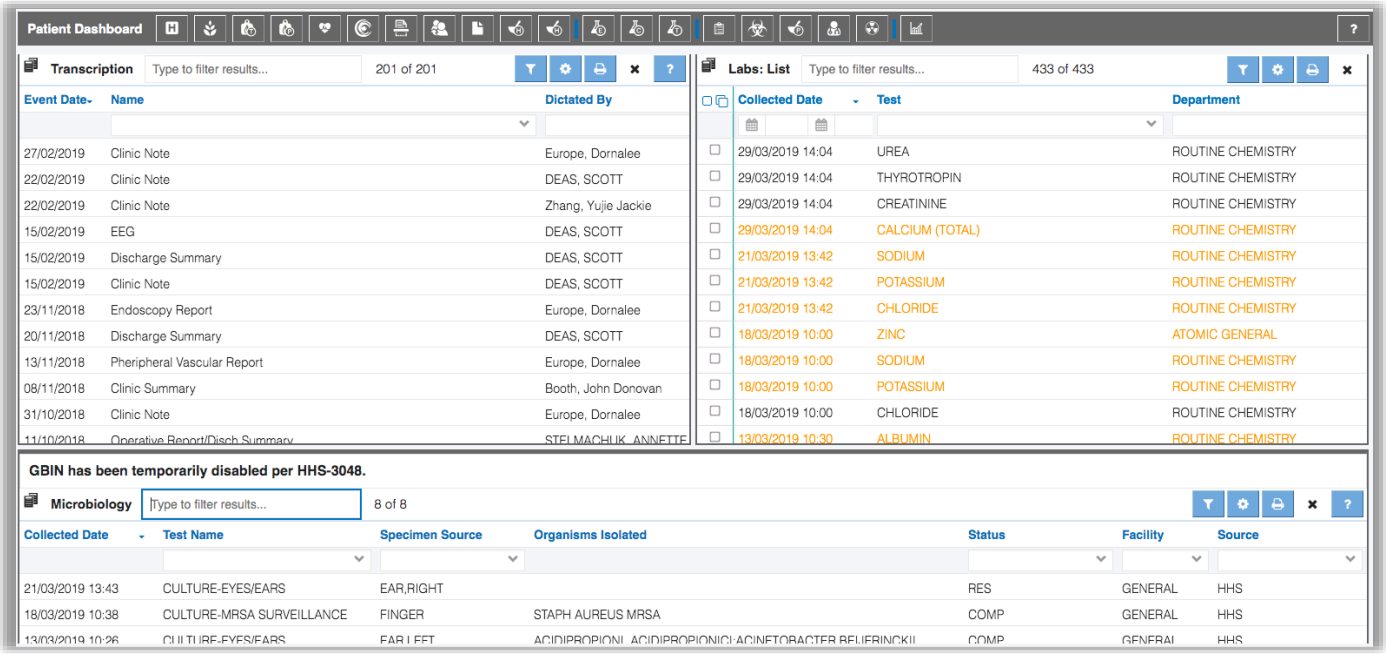
3. To add another module, click and drag the icon of the module you want to add and drop it beside, below or above an existing module in the dashboard.



This example shows the Labs: List module placed beside the Transcription module. Both modules appear in a side-by-side view:



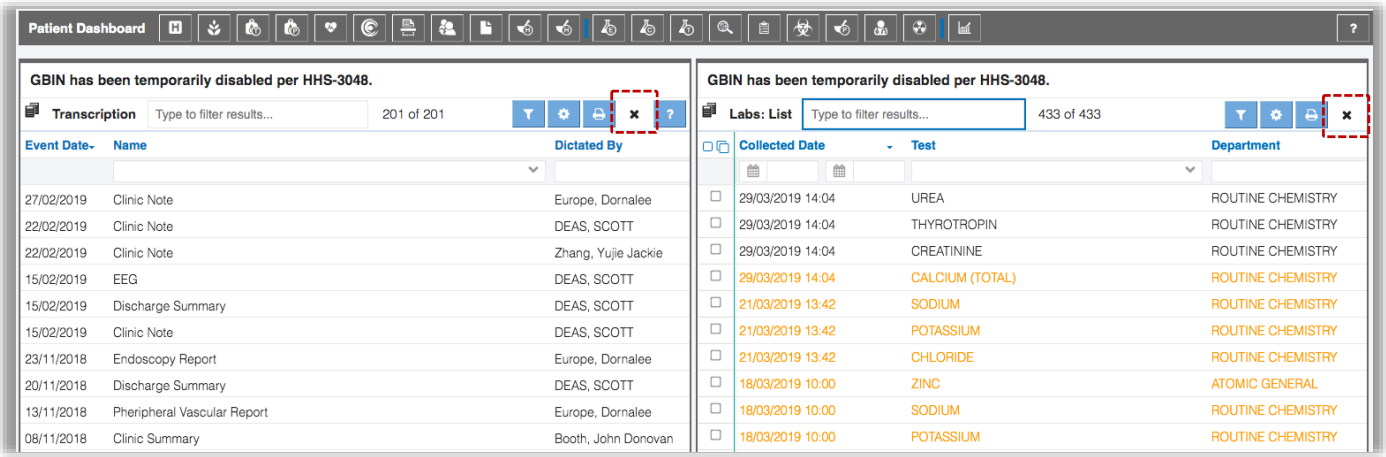
This example shows the Microbiology module placed below the Labs and Transcription modules:



The Transcription module will take up the entire width of the dashboard until another module is added beside it.

Removing Modules from Your Dashboard

To remove a module from your dashboard, click the **Close** button in the header of the module you want removed.

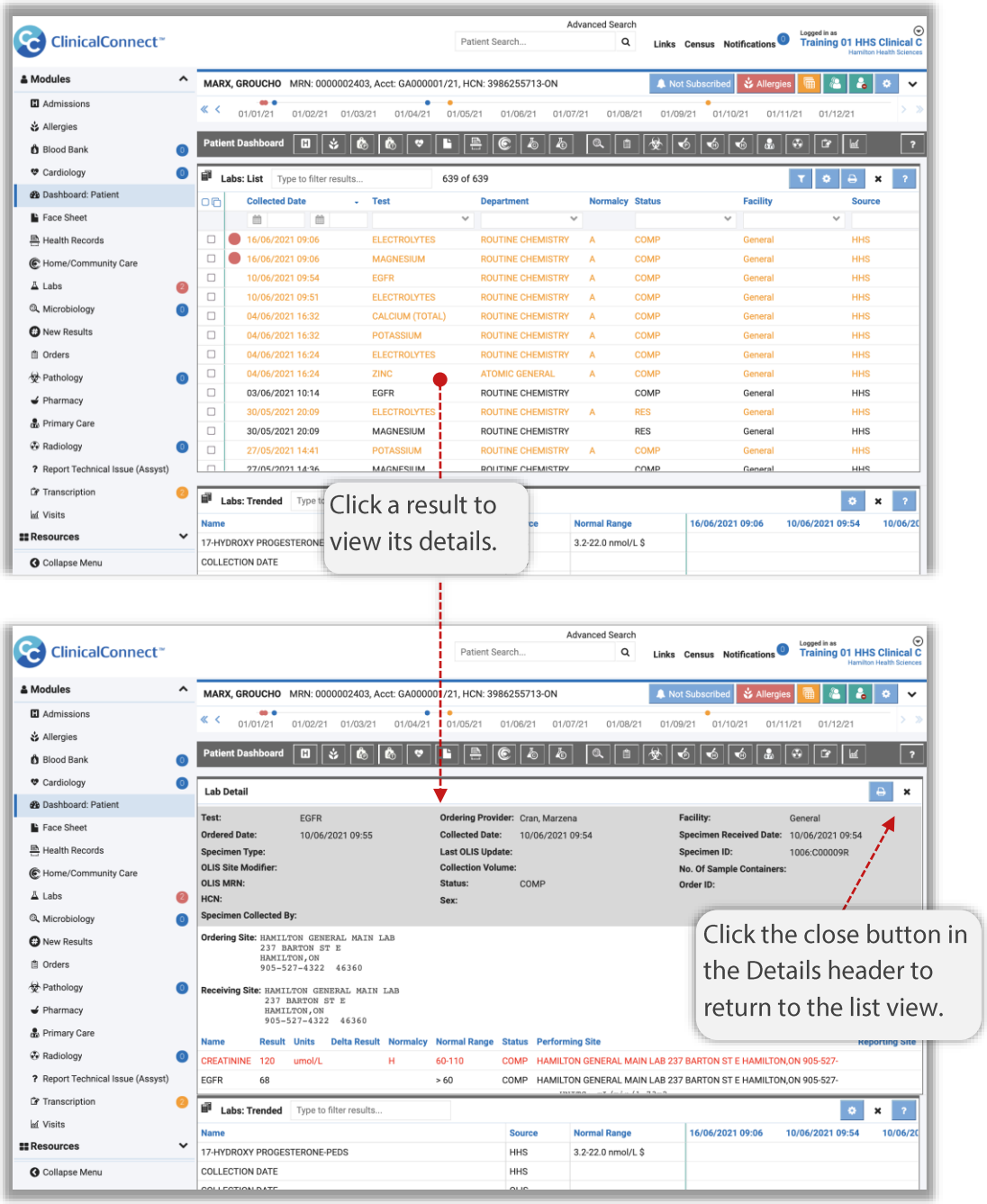


Once a module is removed from the dashboard its module icon returns to the dashboard header. You can add the module back into the dashboard at any time.

Viewing Result Details in the Dashboard

The details of a selected report or test, when accessed from the Dashboard view, will display in the module window as shown below.

Click the close button in the Details header to return to the module's list view in the dashboard.

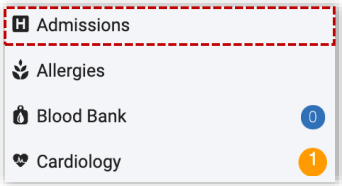


Admissions Module

Show Me

Ask a Question

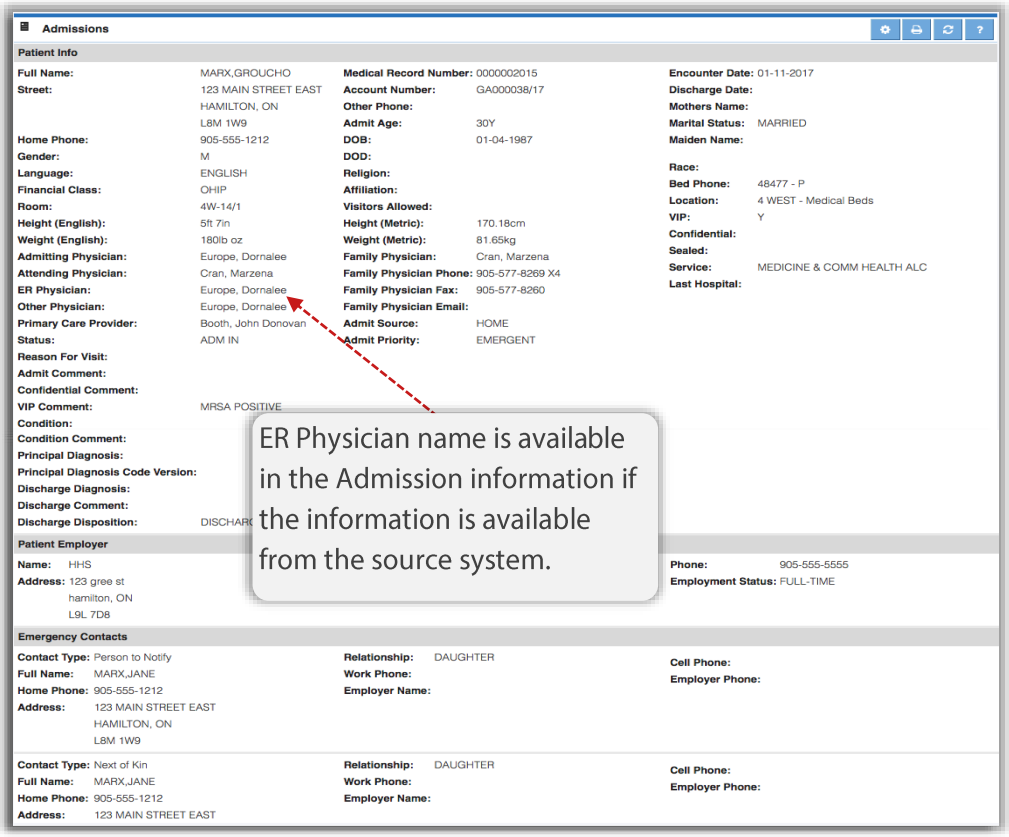
The Admissions module displays patient demographic and encounter registration information from the source hospital information system (HIS). This module displays information from the selected visit only and contains the following sections:



- Patient Info
- Patient Employer
- Emergency Contacts
- Guarantors
- Insurances
- Doctors
- Additional Information

The Admissions module is not applicable and will not display when viewing Home and Community Care (HCC) patient visits.

To access the Admissions module, click the **Admissions** option in the Clinical Modules menu.

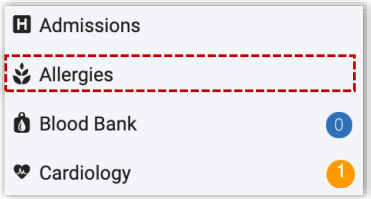


Allergies Module

Show Me

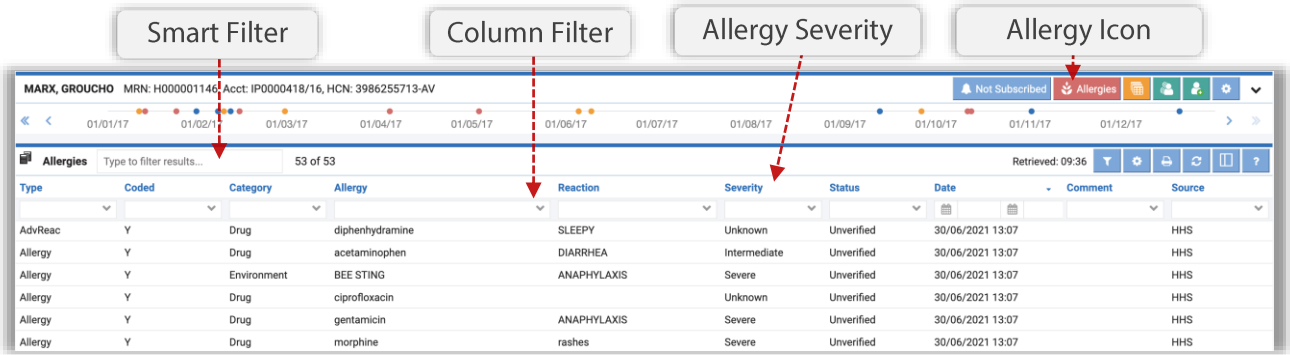
Ask a Question

The Allergies module displays patient allergy information from contributing facilities. Allergies are also flagged with icons in the patient header. To access the Allergies module, click the Allergies option in the Clinical Modules menu or click the Allergies icon Allergies in the patient header.



Allergies are only available from facilities integrating allergy information into ClinicalConnect. To view the list of contributing facilities, please visit this page: https://info.clinicalconnect.ca/CC/healthcare/data-integrations

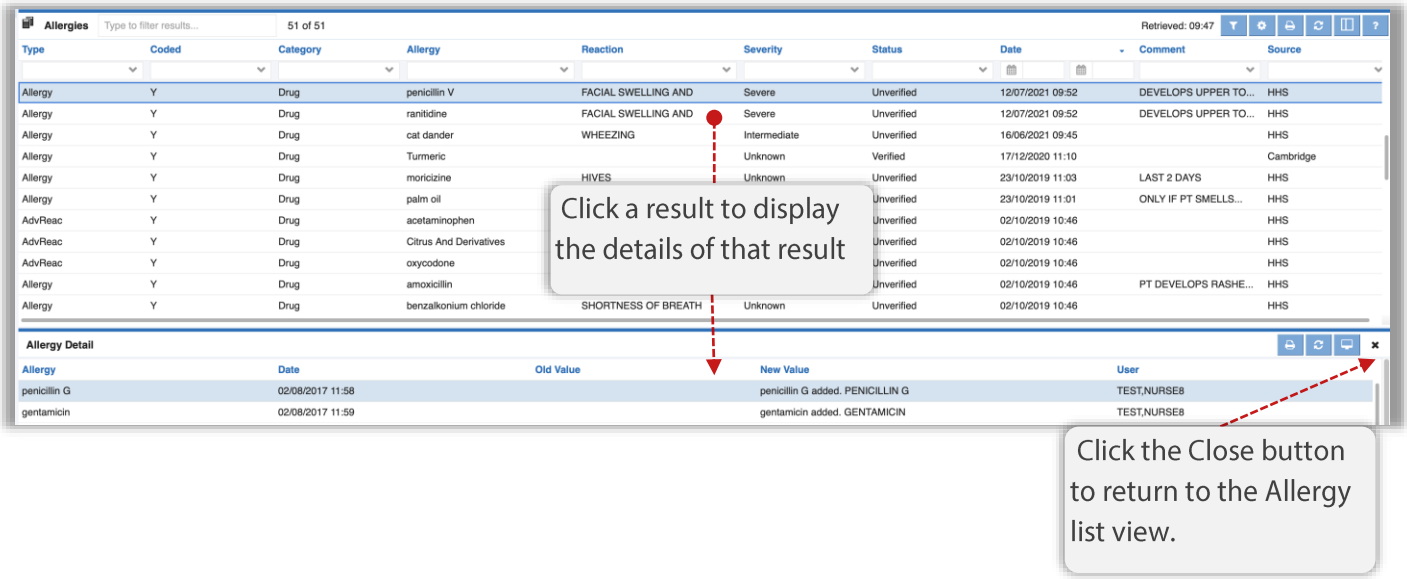
The following table provides a summary of some of the key features of the Allergies module.



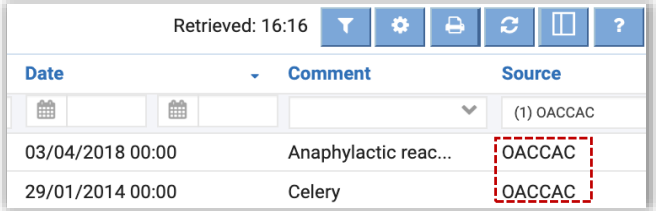
Feature	Summary
Allergies Icon Allergies No known allergies Allergies Not Documented/Collected	An Allergies icon displays in the patient header based on the information made available from the contributing source systems. The following Allergy icons may display in the patient's record: • **Allergies icon (red)** - Specific allergies have been added to the patient's record • **No known allergies icon (blue)** - No known allergies have been added to the patient's record. • **Allergies Not Documented/Collected icon (orange)** - No allergies have been added to the patient's record, or allergy information is currently not available.
Coded	This column displays Coded Allergies as Yes or No. **Coded allergies** are those contained within the allergen dictionary look up from the contributing sources system and will display **Y** (Yes) in the column. Allergy information that is "uncoded" is any free text additions made available from the contributing sources system and will display **N** (No) in the column.
Smart Filter	Text typed in the Smart Filter Search box narrows the list of results to display only those related to text you entered. In the example below, the Smart Filter Search box was used to narrow the list of allergies to display only Morphine or Codeine. The user entered morph, cod which will search the allergies list grid for any text that included morph OR cod. **Allergies** morph,cod All other results were filtered out and do not display in the products list view until the contents of the Smart Filter are cleared. See the Smart Filter section to learn more about filtering results and lists with the Smart Filter tool.
Allergy Severity	Displays the full allergy severity: • Mild • Intermediate • Severe • Unknown

Viewing Allergy Details

Allergy results are displayed in a sortable list. In some cases, there may be additional allergy details available from the contributing source system. Click the row of the allergy you want to view to see additional details.



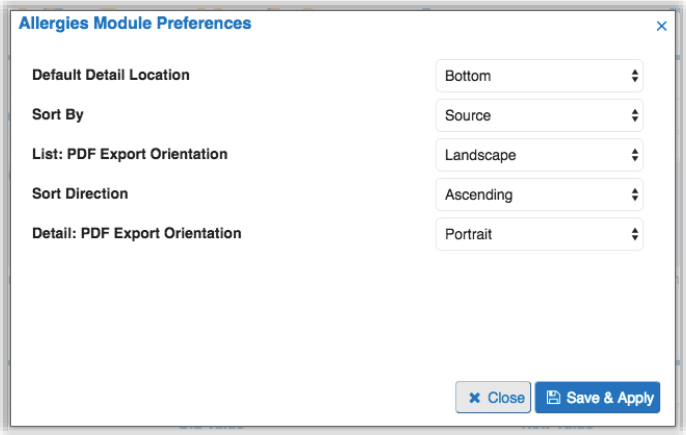
Home and Community Care allergy information is integrated in the Allergies module using OACCAC as the Source.



Allergies Preferences

Module Preferences are used to customize how you want to view information presented in the Allergies module to suit your clinical viewing needs. Preferences need to only be set once, and can easily be updated anytime as your clinical needs change.

The Allergies module has its own set of preferences that can be accessed and configured by clicking the Preferences button in the module header or by using the Preference Setup Wizard.



After updating your preference settings, click the **Save & Apply** button to save your changes.

To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

Blood Bank Module

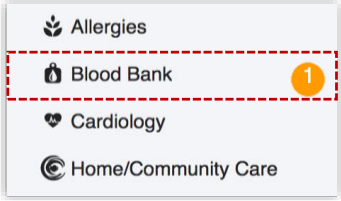
Show Me

Ask a Question

The Blood Bank module displays Blood Bank products and tests contributed from source systems. The Blood Bank module also displays the available Group and Screen information for the patient in the banner below each Blood Bank header.

To access the Blood Bank module, click the **Blood Bank** option in the Clinical Modules menu.

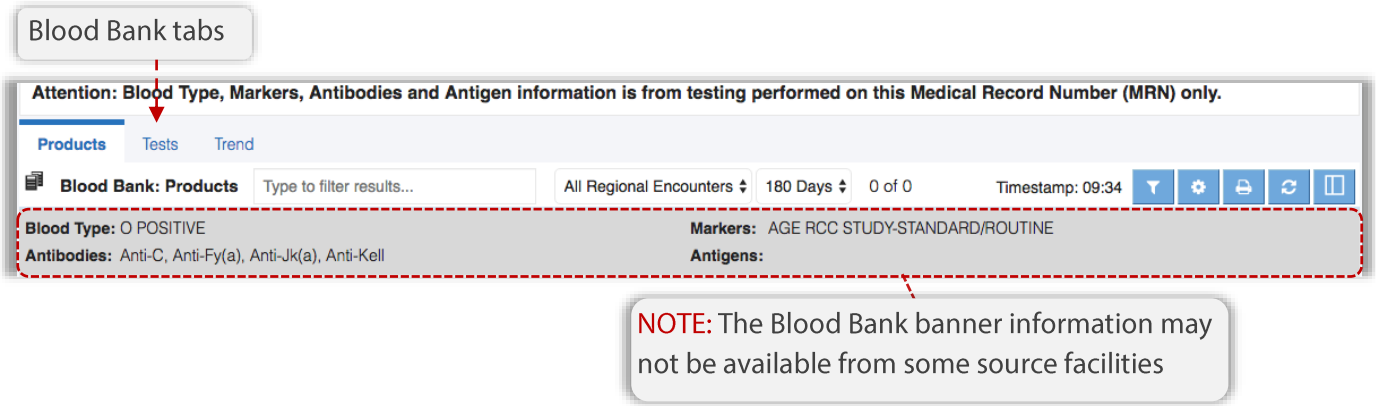
The Blood Bank module includes three tabs:



- **Products** – Lists blood bank products including product details when selected
- **Tests** – Trends Blood Bank test results
- **Trend** – Displays multiple test results in a timeline

If new Blood Bank results or products are available for the selected visit, the module will be flagged with the orange **New Result** indicator and a number showing how many new results are available. See the New Results section to learn more about how new results are flagged.

OLIS data is currently not available in the Blood Bank Module and will not display any product or test information in these views.



Group and Screen Information Banner

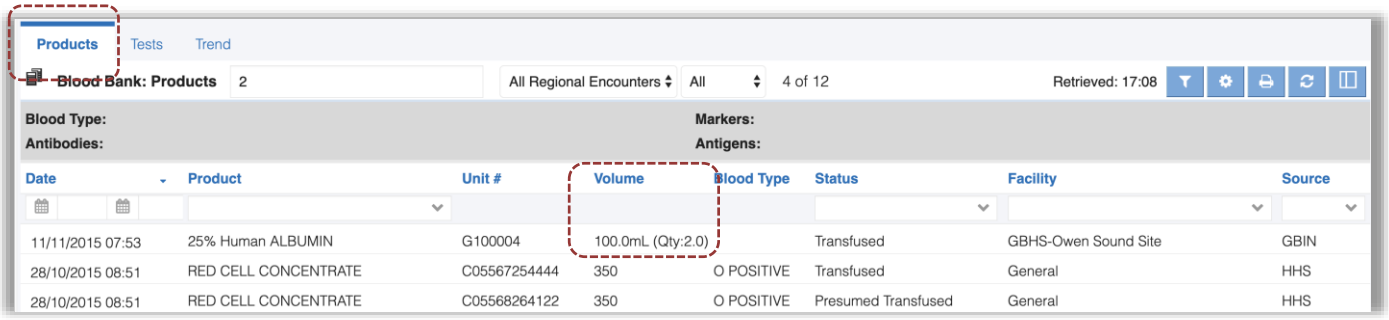
The grey information banner shown above provides a quick view of Blood Type, Markers, Antibodies, and Antigen test results based on the selected patient's Medical Record Number (MRN).

NOTE: The Blood Bank banner information may not be available from some source facilities.

Products Tab

The Blood Bank: Products module displays blood bank product information from source hospital systems.

1. To access the Blood Bank module, click the **Products** tab.



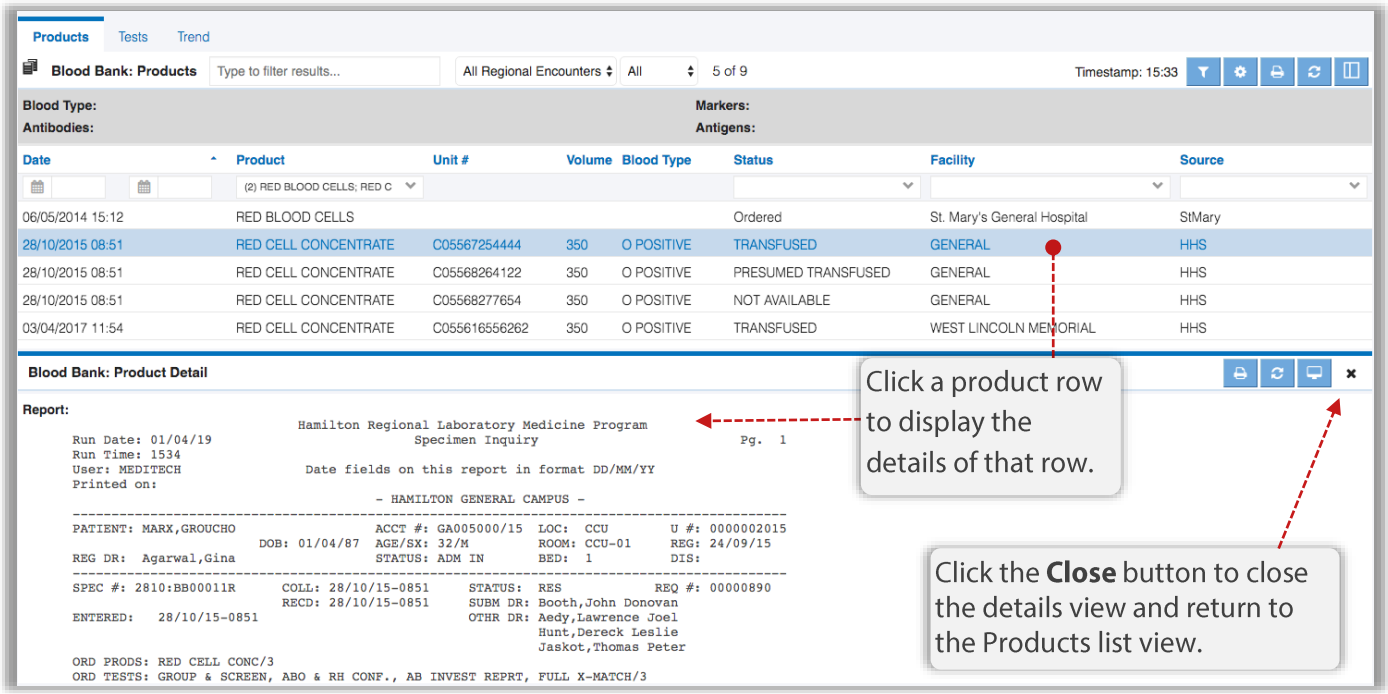
Blood Bank product information from select contributing facilities, may include a single unit volume in the Volume column, followed by a quantity in parenthesis as shown in the example above.

In such cases, the total product volume would be defined by the quantity indicator.
For Example: 100 mL (Qty:2.0) would indicate a total volume of 200 mL.
In addition, some blood product data line items will not display any product details if selected from the list view from select facilities.

Viewing Blood Bank: Products Details

To view the details of a listed blood product, click the row of the product to view additional details if available.

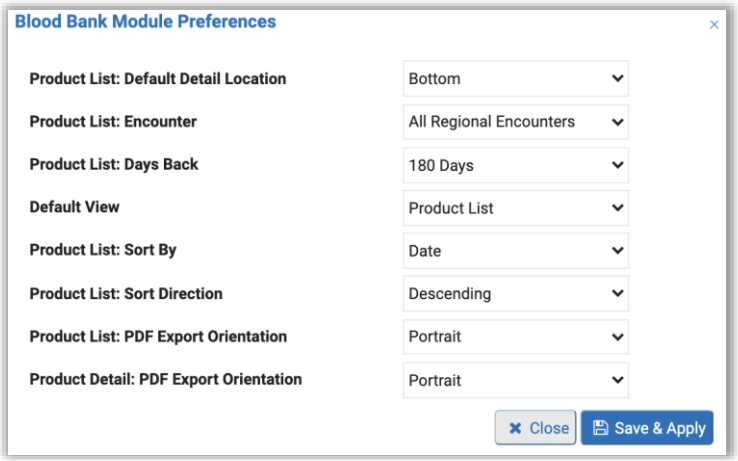
Some blood product data line items from some facilities will not display any additional product details if selected from the list view.



Depending on your preference settings, Product Detail will either show up to the right of the results list or below the results list.

Blood Bank: Products Preferences

The Products view has its own set of preferences that can be accessed and configured by clicking the Preferences button in the module header or by using the Preference Setup Wizard.

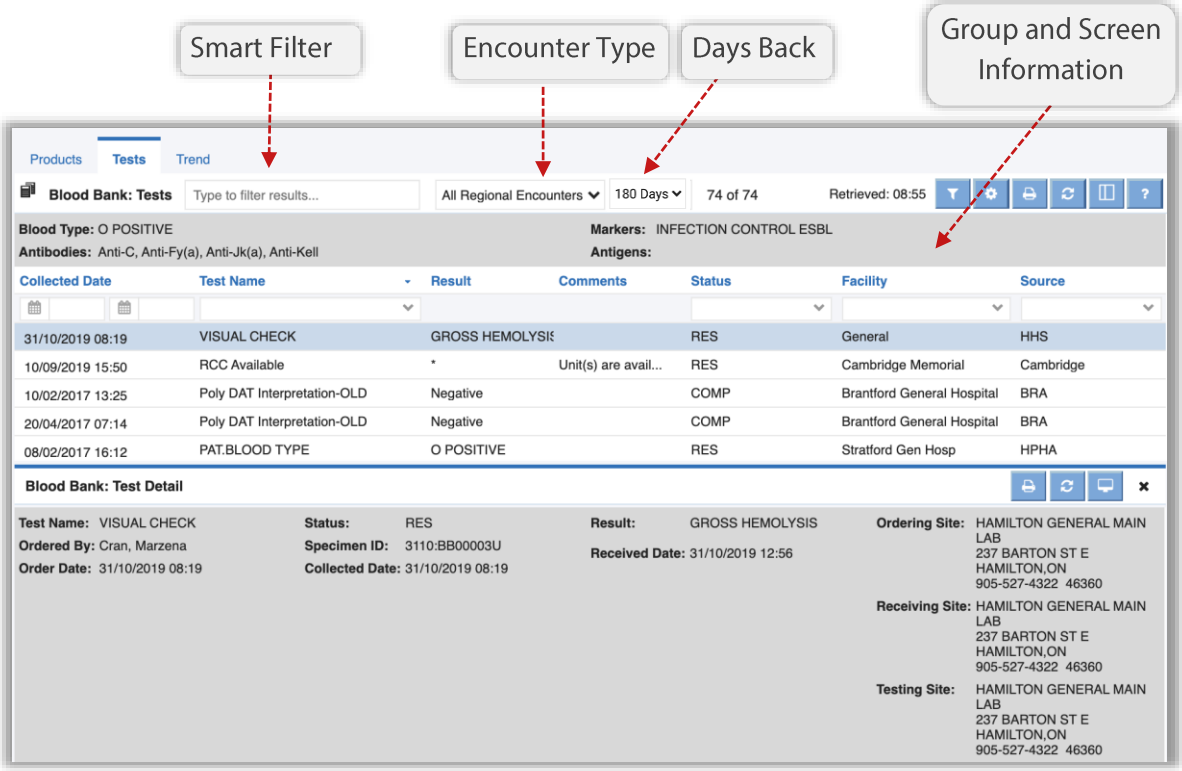


After updating your preference settings, click the **Save & Apply** button to save your changes.

To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

Tests Tab

To access the Blood Bank Tests view, click the **Tests** tab located above the Blood Bank header.



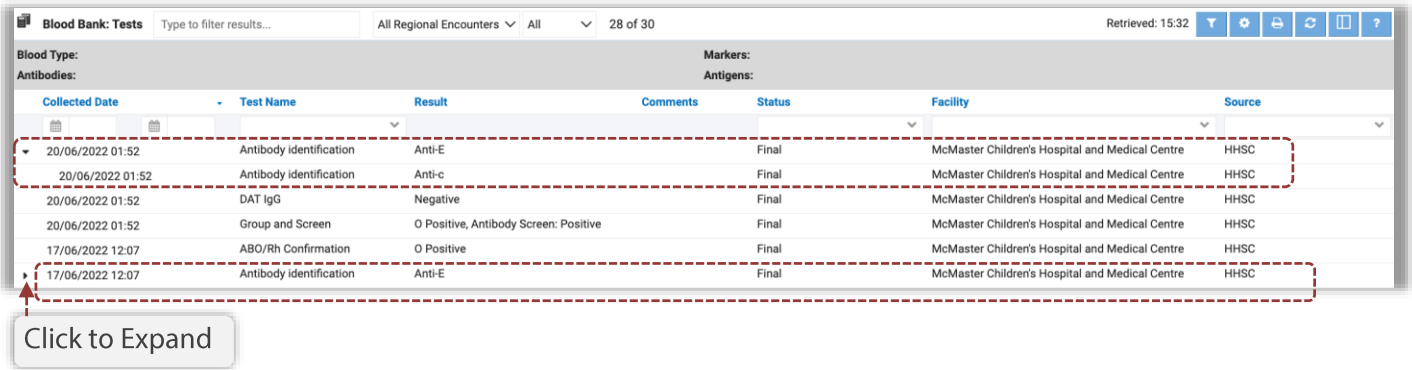
Some blood test data line items from some facilities will not display any additional blood test details if selected from the list view.

The following table provides a summary of some of the key features of the Tests view.

Feature	Summary
Smart Filter	Text typed in the Smart Filter Search box narrows the list of results to display only those related to text you entered. In the example above, the user wanted to narrow the list of results to display only antibody tests with a positive result. This was done by entering anti pos in the Smart Filter search box, which means you only want see information that include both anti AND neg. **Blood Bank: Tests** anti pos All other results were filtered out and do not display in the Results List view until the contents of the Smart Filter are cleared. See the Smart Filter section to learn more about filtering results and lists with the Smart Filter tool.

Antibody Identification test results from Hamilton Health Sciences with the **source of HHSC** and where multiple antibodies are identified for the **same collection** date, will present in a rolled-up list and will display the Expand ▶ icon to the left of the line item.

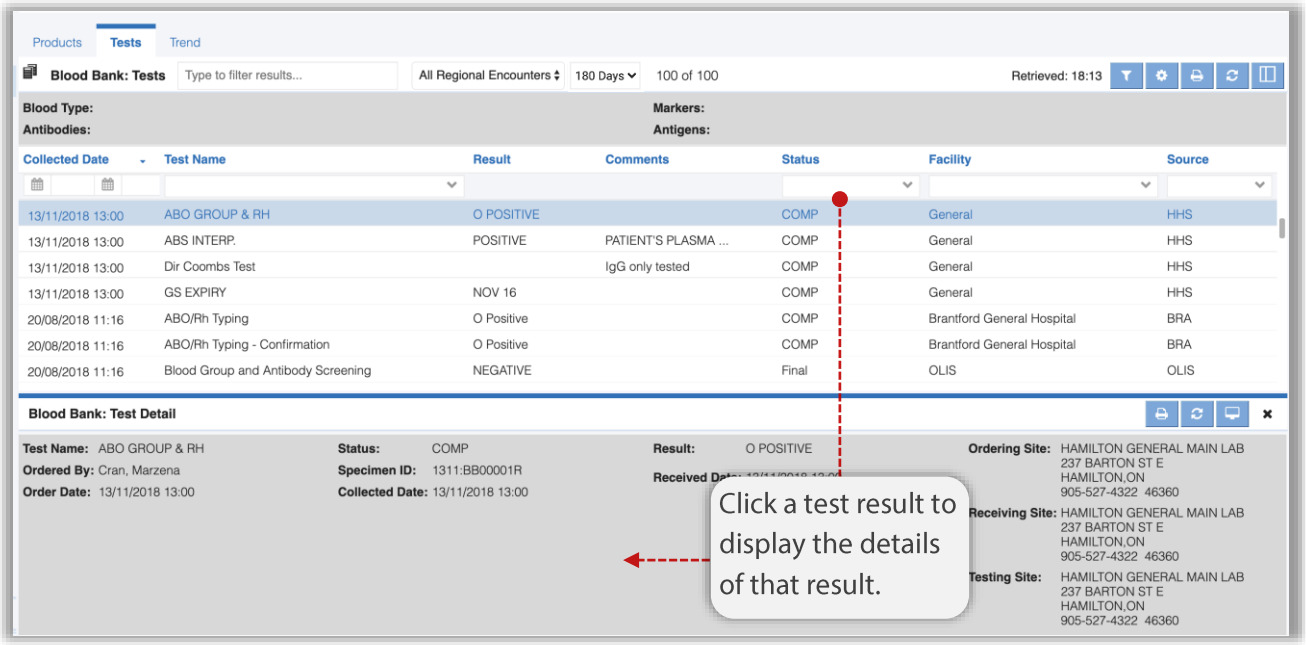
To view the associating antibody results, click the Expand ▶ icon.



Viewing Blood Bank: Test Detail

To view blood bank test details, click the row of the result you want to display the details view.

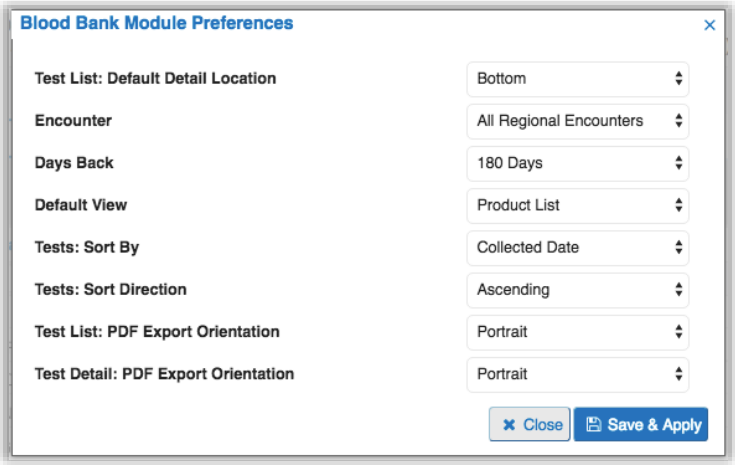
Some blood test data line items from some facilities will not display any additional blood test details if selected from the list view.



Click the **Close** button to close the details view and return to the Test Results List.

Blood Bank: Test Preferences

The Test view has its own set of preferences that can be accessed and configured by clicking the Preferences button in the module header or by using the Preference Setup Wizard.

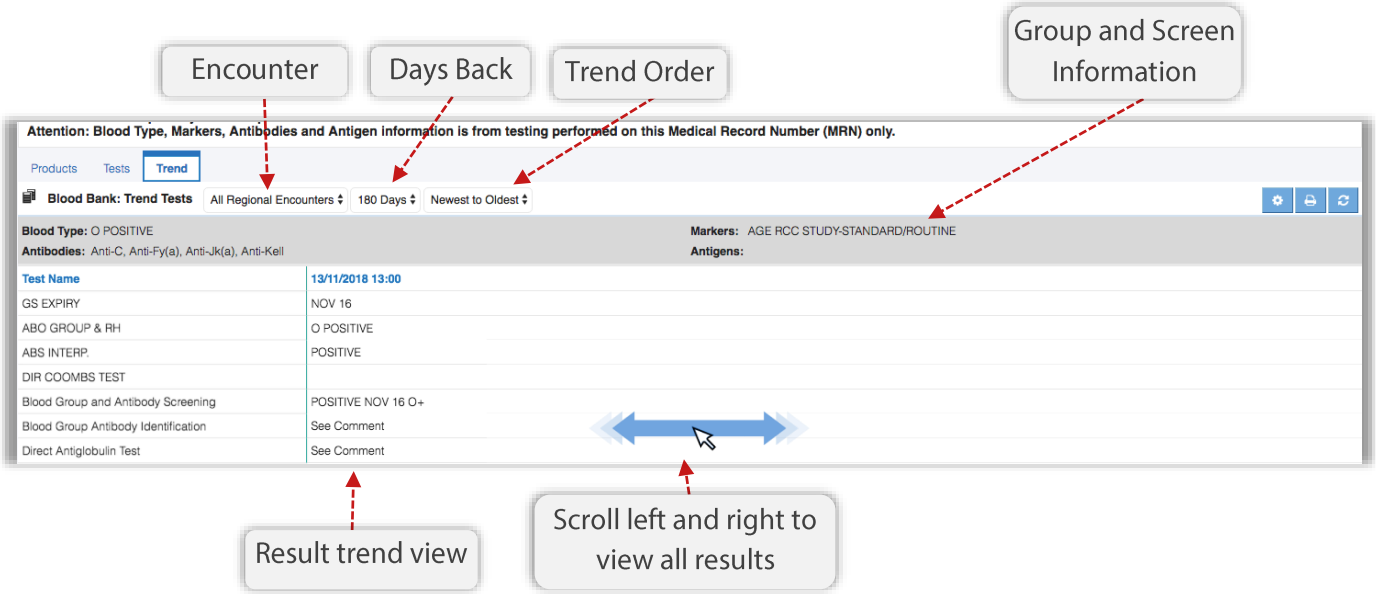


After updating your preference settings, click the **Save & Apply** button to save your changes.

To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

Trend Tab

To access the Blood Bank Trend view, click the **Trend** tab located above the Blood Bank header.

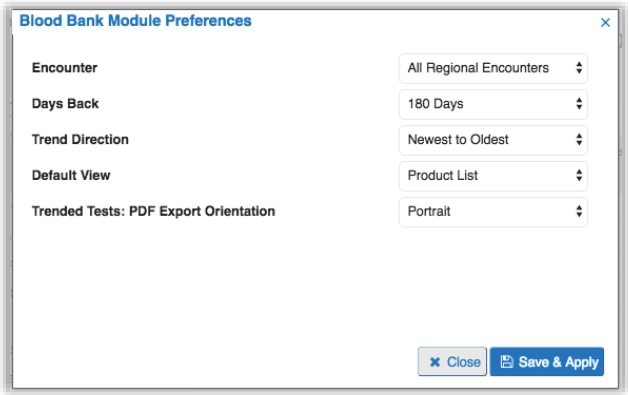


The following table provides a summary of some of the key features of the Trend view.

Feature	Summary
Trend Order ✓ Newest to Oldest Oldest to Newest	Lists test result trends from oldest to newest or newest to oldest.
Result Trend View	All test results are displayed in date stamped column. Scrolling left and right allows you to see the progression of test results based on the date the test occurred.

Blood Bank: Trend Preferences

The Trend view has its own set of preferences that can be accessed and configured by clicking the Preferences button in the module header or by using the Preference Setup Wizard.



After updating your preference settings, click the **Save & Apply** button to save your changes.

The following table provides a summary of a specific preference setting for this module:

Preference	Description
Trend Direction	Sorts the date columns by Newest to Oldest or Oldest to Newest.

To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

Cardiology Module

Show Me

Ask a Question

The Cardiology module provides streamlined access to cardiology-type reports and images, such as Echocardiograms and Holter reports, which previously would have been found in either the Radiology or Transcriptions modules.

This module aggregates Cardiology-related radiology and transcribed reports from select acute care hospitals into the Cardiology module. Please review the ClinicalConnect Data Integration Chart to see the organizations that are contributing their data into this module.

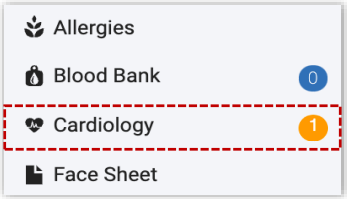
Reports from other contributing source systems, will continue to be available in the Radiology and Transcriptions modules and users should check these modules for additional cardiology–related reports.

Cardiology Images

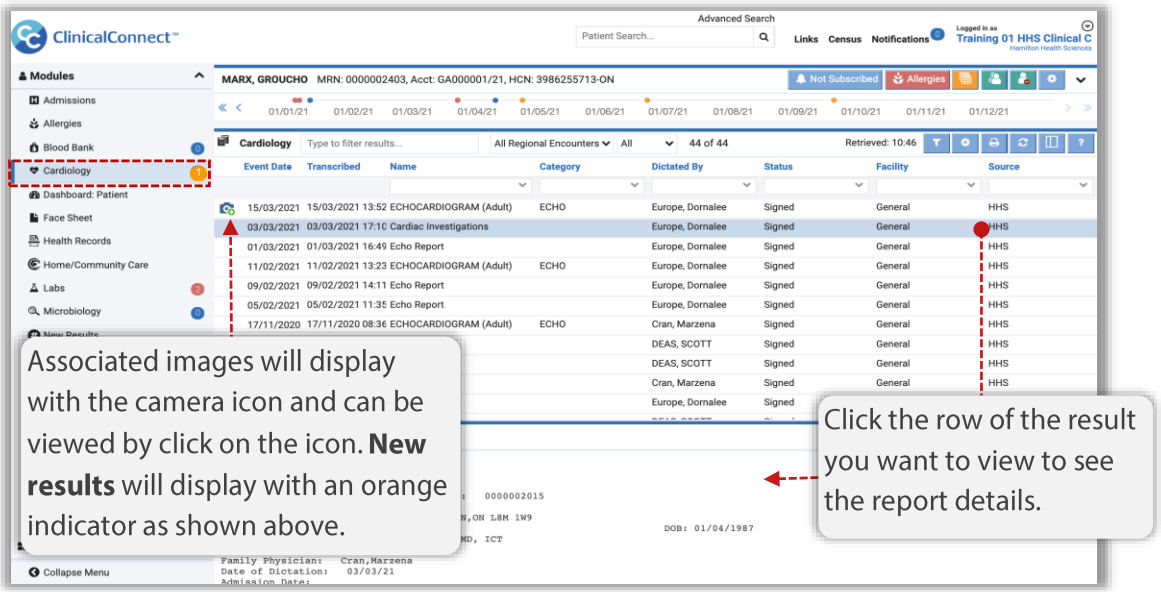
The Cardiology module may include the corresponding diagnostic images from South West Ontario only, if available from the source system, and will display the camera icon beside the report line item. These images will display using the GE Centricity Universal Zero Footprint (ZFP) Viewer. To learn more about using the viewer please refer to the section in this guide: **SWODIN Images - GE Centricity Universal Zero Footprint (ZFP) Viewer**.

New Result Indicators

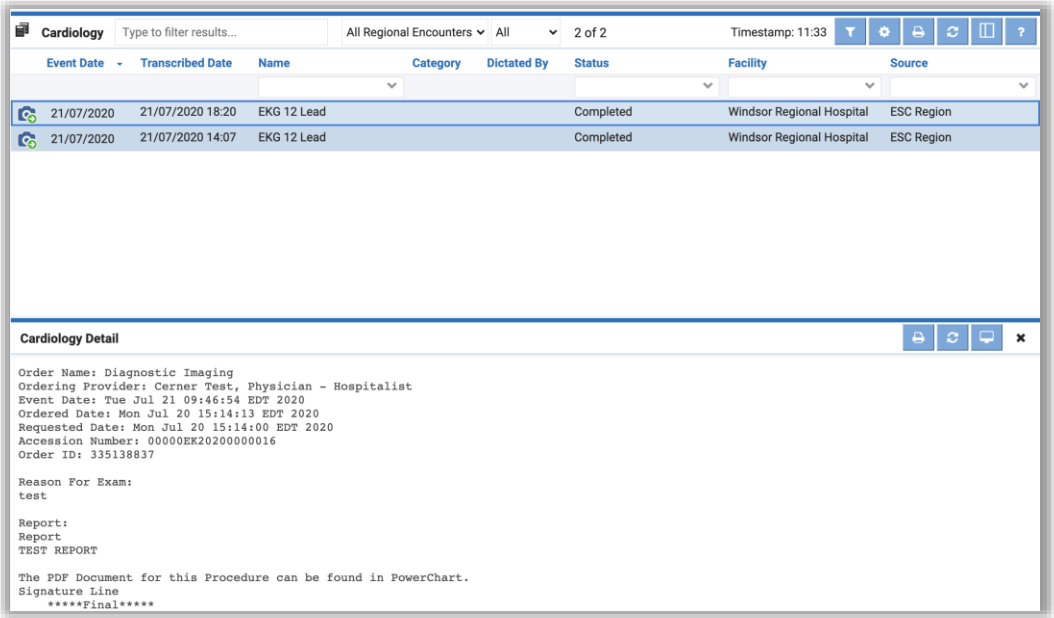
If new results are available in this module, the New Results indicator will display with an orange indicator as shown below.
(Refer to New Results & Preferences section in the user guide for additional details).



To access the Cardiology module, click the **Cardiology** option from the Clinical Modules menu.



Cardiology report details may not be available from select facilities as shown in this example and in these cases, users should contact the facility.



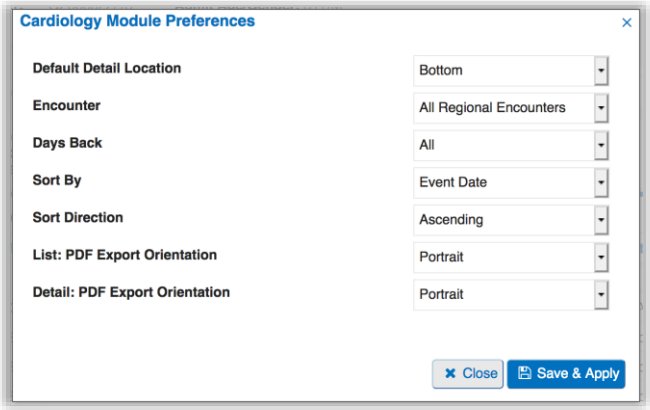
Viewing Reports in Original Format

Cardiology reports from select source systems, when selected, may open in their original format such as PDF or Word, rather than in the details view. These types of reports will display the following message in the details screen: **This document is only available in its original format.**

1. To view the report, first, click the download icon to download the transcription, then open the transcription which will display in its original format. Once the download is complete, you can open the transcription in PDF or Word viewer of your choice.

Cardiology Preferences

The Cardiology module has a set of preferences that can be accessed and configured by clicking the Preferences button in the header or by using the Preference Setup Wizard.



After updating your preference settings, click the **Save & Apply** button to save your changes.

To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

Home and Community Care Module

Show Me Ask a Question

The Home & Community Care (HCC) module includes data made available from the Client Health Related Information System (CHRIS) from the following south west Ontario Local Health Integration Networks (LHINs):

- Hamilton Niagara Haldimand Brant (HNHB)
- Waterloo Wellington (WW)
- Erie St.Clair (ESC)
- South West (SW)

This module also contains data from Home and Community Care Services from beyond south west Ontario LHINs, made available from the Acute and Community Clinical Data Repository (acCDR). ClinicalConnect™ users who currently have access to acCDR data through ClinicalConnect™ will be enabled to access the additional Home and Community Care data available through this integration enhancement.

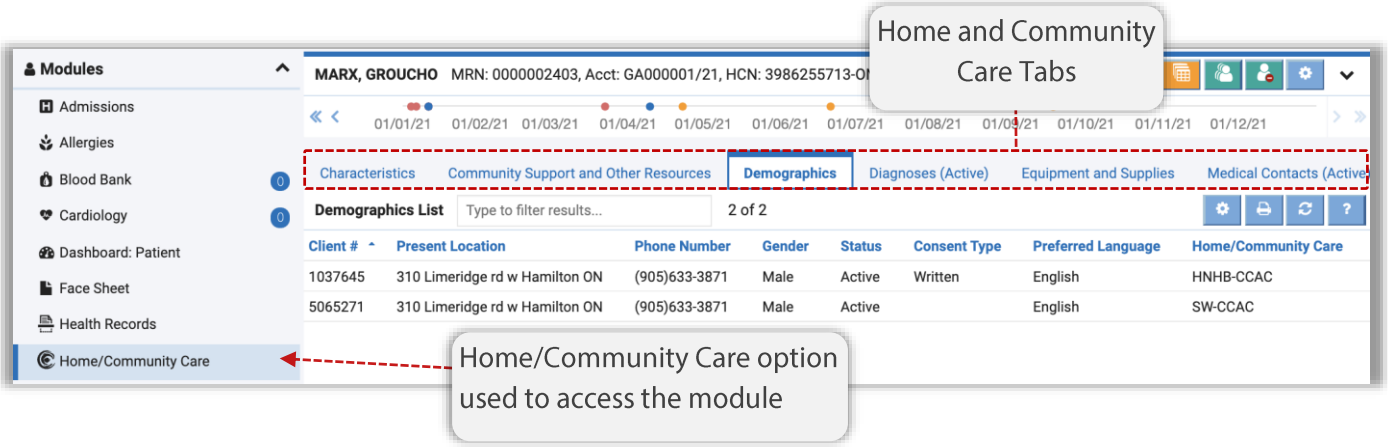
The HCC module displays information in tabs where information is available from home and community care providers. If there is no information from home and community care providers for a specific tab, that tab will not display in the Home and Community Care module. Tabs identified as **Active** include information that is current. Historical data is not available.

* Patient records with Home and Community Care information available in acCDR, will now display in ClinicalConnect in the select tabs as shown in blue below.

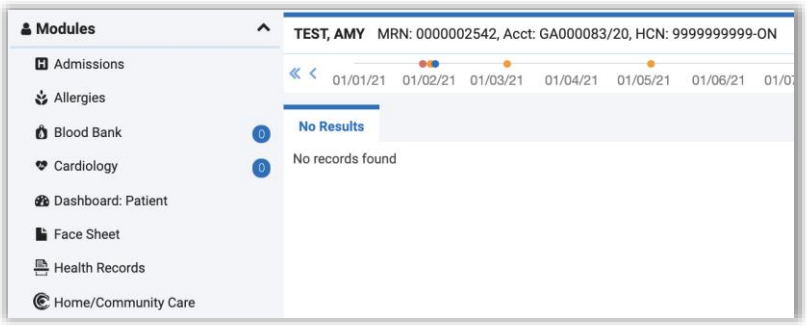
Tabs include:

- Demographics
- Characteristics
- Medical Contacts (Active)
- Personal Contacts (Active)
- Service List (Active) *
- LTCH Choices and Bookings
- Community Support and Other Resources (Active)
- Diagnosis (Active)
- Notes *
- Primary Care Group (Active)
- Risk List (Active) *
- Safety Issue List (Active) *
- Referrals *
- Equipment and Supplies *
- HCC Coordinated Care Plan *

To access the Home and Community Care module, click the **Home/Community Care** option in the Clinical Modules menu.



If a patient does not have a Home and Community Care record, the Home and Community Care Module will display a message indicating **No Items Found**. Home and Community Care patients which are deemed as confidential by Home and Community Care, will not have any Home and Community Care data displayed in ClinicalConnect.



Patient Search Results displaying Home and Community Care Encounters

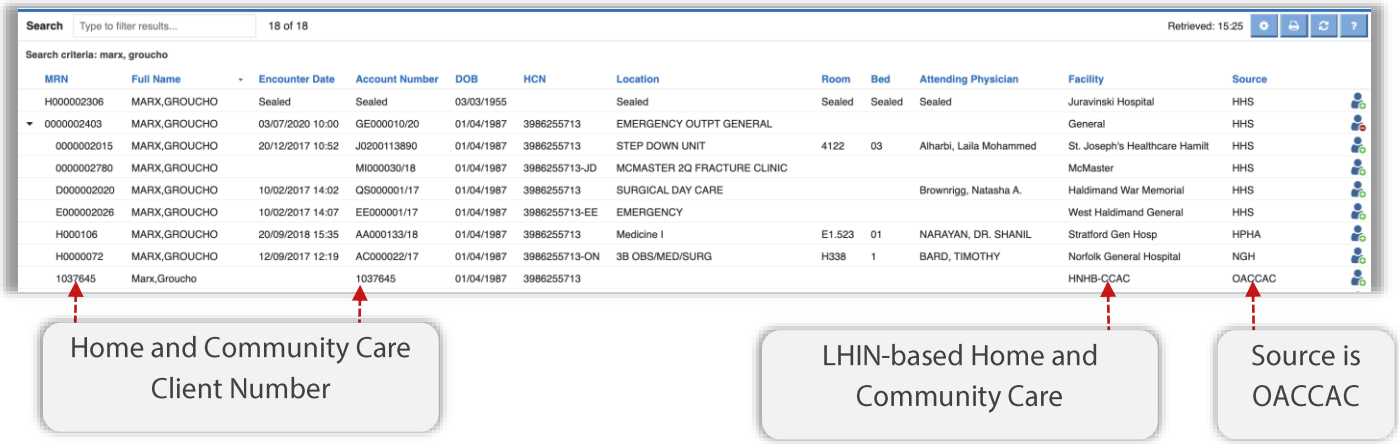
When searching for a patient in ClinicalConnect, the search results will include any Home and Community Care encounters. HCC encounters are identified with the specific LHIN-based Home and Community Care in the facility column and OACCAC in the source field. If the client has had HCC services across all four regions, each encounter will be identified in the facility field.

If the patient has HCC services from beyond south west Ontario and if there is data available in the acCDR. The facility will display the name of LHIN HCC and source column will display eHealth Ontario.

Selecting the Home and Community Care encounter from the search results list will open the Home and Community Care module for that patient.

For Home and Community Care encounters, the Medical Records Number (MRN) column will display the Home and Community Care client ID number. The MRN and Account Number for a Home and Community Care encounter is always the same number. This Home and Community Care client ID number can be used to search for a Home and Community Care-specific encounter in ClinicalConnect using the Simple Search.

The Client number search will not find patient record from the acCDR. When searching for acCDR patient records, user the Health Card Number (HCN) or name.

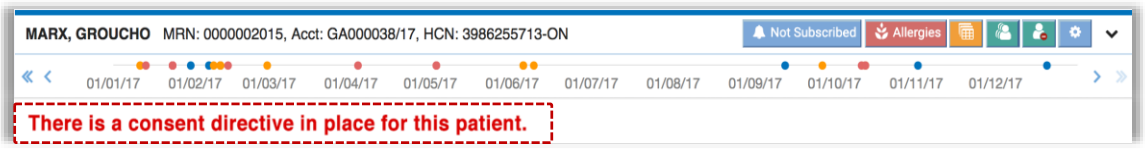


MRN	Full Name	Encounter Date	Account Number	DOB	HCN	Location	Room	Bed	Attending Physician	Facility	Source
H000002306	MARX,GROUCHO	Sealed	Sealed	03/03/1955		Sealed	Sealed	Sealed	Sealed	Juravinski Hospital	HHS
0000002403	MARX,GROUCHO	03/07/2020 10:00	GE000010/20	01/04/1987	3986255713	EMERGENCY OUTPT GENERAL				General	HHS
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
0000002780	MARX,GROUCHO		MI000030/18	01/04/1987	3986255713-JD	MCMASTER 2Q FRACTURE CLINIC				McMaster	HHS
D000002020	MARX,GROUCHO	10/02/2017 14:02	QS000001/17	01/04/1987	3986255713	SURGICAL DAY CARE			Brownrigg, Natasha A.	Haldimand War Memorial	HHS
E000002026	MARX,GROUCHO	10/02/2017 14:07	EE000001/17	01/04/1987	3986255713-EE	EMERGENCY				West Haldimand General	HHS
H000106	MARX,GROUCHO	20/09/2018 15:35	AA000133/18	01/04/1987	3986255713	Medicine I	E1.523	01	NARAYAN, DR. SHANIL	Stratford Gen Hosp	HPHA
H0000072	MARX,GROUCHO	12/09/2017 12:19	AC000022/17	01/04/1987	3986255713-ON	3B OBS/MED/SURG	H338	1	BARD, TIMOTHY	Norfolk General Hospital	NGH
1037645	Marx,Groucho		1037645	01/04/1987	3986255713					HNHB-CCAC	OACCAC

Acute and Community Clinical Data Repository (acCDR) Consent Directive

A patient has the right to withdraw consent to the access and use of their full or partial records from acCDR through the current Ontario Health process. ClinicalConnect honours any partial or full consent restriction and will display the following message in the Transcription and Visits modules:

There is a consent directive in place for the selected patient.

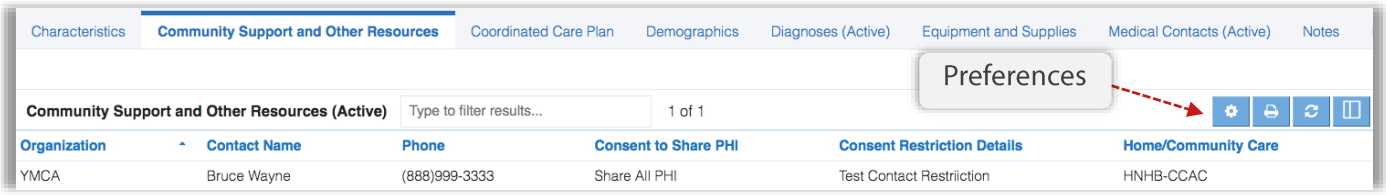


If access to a blocked record is required, you may contact Ontario Health Service Desk Support at 1-866-250-1554 or by email at OH-servicedesk@ontariohealth.ca.

Community Support and Other Resources (Active)

Community Support and Other Resources include a list of **Active** patient support services based on the information provided by Home and Community Care.

Click the **Community Support and Other Resources** tab (if available) to access Community Support and Other Resources.

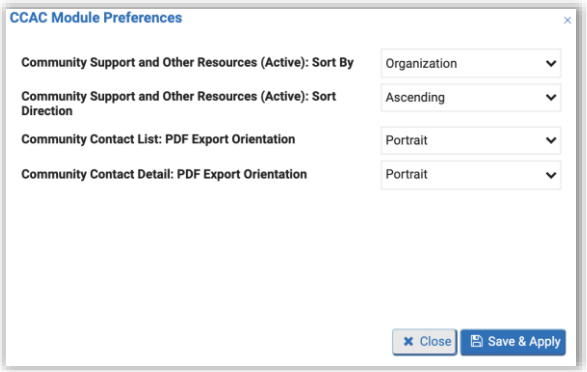


The following table provides a summary of a key feature of the Community Support and Other Resources tab.

Feature	Summary
Consent to Share Personal Health information (PHI)	Can include the following: • Share All PHI • Share Limited PHI (see consent restriction) • Share NO PHI

Community Support and Other Resources Preferences

The Community Support and Other Resources tab has its own set of preferences that can be accessed and configured by clicking the Preferences button in the header or by using the Preference Setup Wizard.

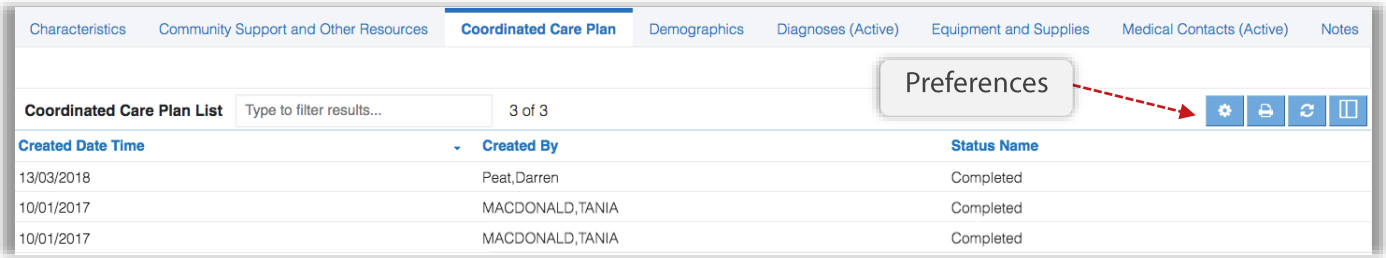


After updating your preference settings, click the **Save & Apply** button to save your changes.

To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

Coordinated Care Plan List

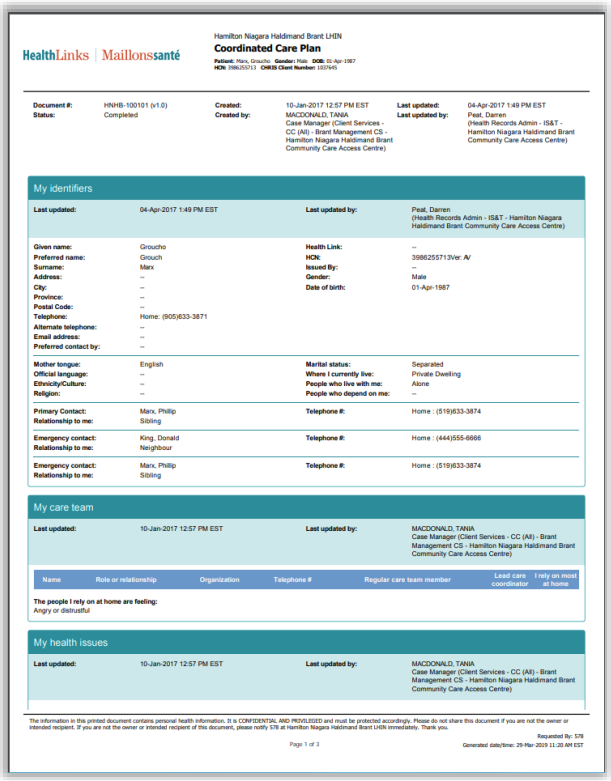
The Coordinated Care Plan List displays Coordinated Care Plans (CCP) developed by Home and Community Care for their clients if applicable. Click the **Coordinated Care Plan List** tab (if available) to access the Coordinated Care Plans List.



CCP data is currently only available from South West and Waterloo Wellington LHIN Home and Community Care Services and for clients that have a CCP available in acCDR. If there is no CCP information from home and community care providers, this tab will not display in the Home and Community Care module for the selected patient.

Viewing Coordinated Care Plan Details

Coordinated Care Plans are displayed in a sortable list. Click a line item in the list to see a detailed PDF view of the selected CCP.



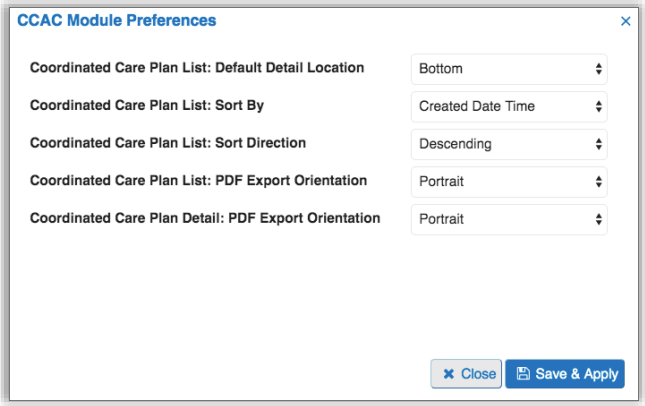
The CCP consists of several patient-specific sections and can span across multiple pages of the PDF document. Sections can include **My Identifiers**; **My Plan to achieve my goals; My Care Team; My Health Conditions; My Situation and Lifestyle; My Most Recent Hospital Visit** and **My Current Supports and Services**.

The following table provides a summary of a key feature of the Coordinated Care Plan List tab.

Feature	Summary
Status	The status will display as In Progress, Completed or Completed-Revised (as defined by Home and Community Care).

Coordinated Care Plan List Preferences

The Coordinated Care Plan List tab has its own set of preferences that can be accessed and configured by clicking the Preferences button in the header or by using the Preference Setup Wizard.

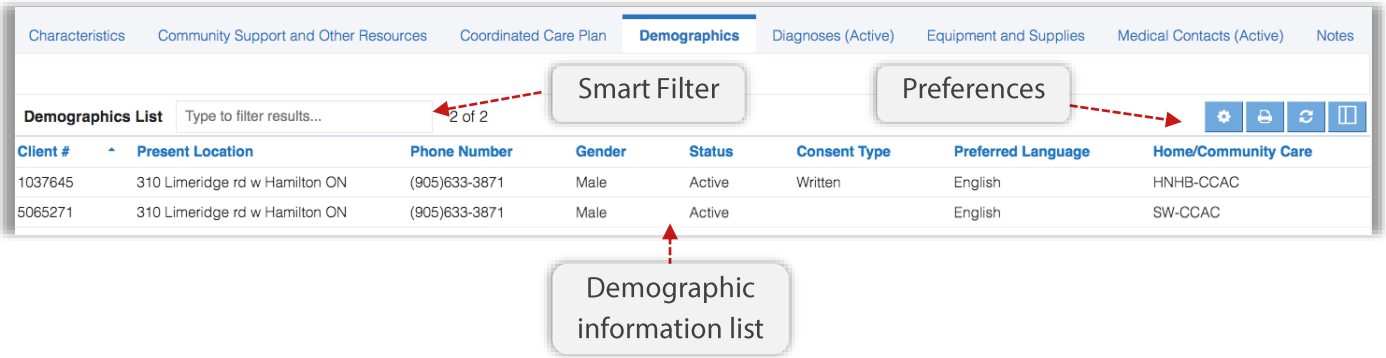


After updating your preference settings, click the **Save & Apply** button to save your changes.

To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

Demographics

Demographics contains available client information with the status indicators of Active, Inactive or On Hold. Click the **Demographics** tab (if available) to access Home and Community Care demographic information.

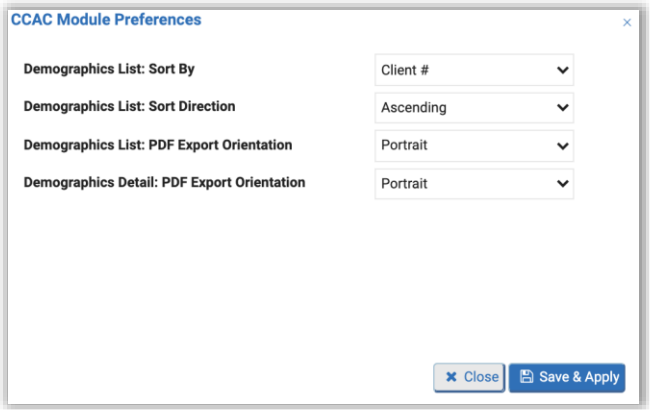


The following table provides a summary of key features of the Demographics tab.

Feature	Summary
Status	Demographics tab contains client information that is available with the status indicators of Active, Inactive or On Hold. • **Active** - Client currently receiving Home and Community Care service • **Inactive** - Client had a Home and Community Care referral in the past but is currently not an active client. • **On Hold -** Client is on hold due to hospital admission, vacation, or other reason
Demographic Information List	A list of demographic results based on the Smart Filter and preference settings.

Demographics Preferences

The Demographics tab has its own set of preferences that can be accessed and configured by clicking the Preferences button in the header or by using the Preference Setup Wizard.



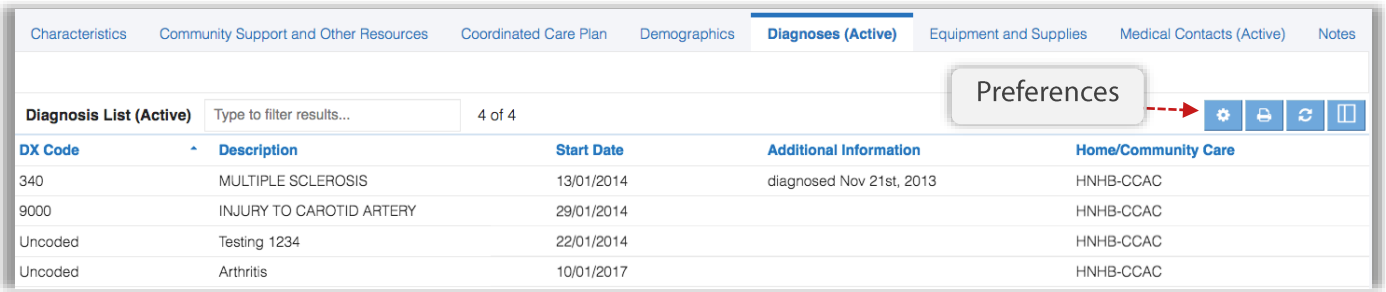
After updating your preference settings, click the **Save & Apply** button to save your changes.

To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

Diagnosis List (Active)

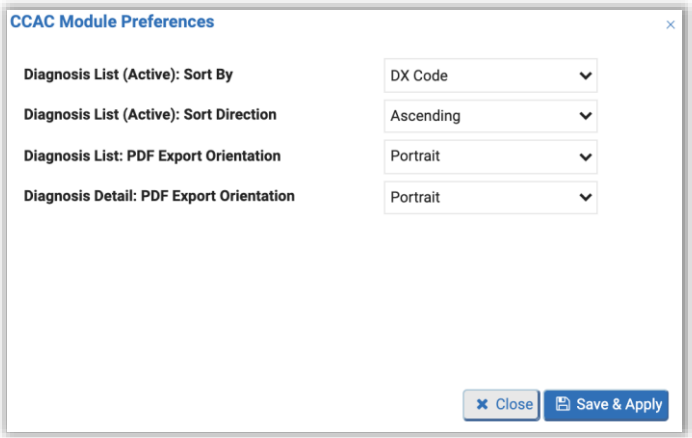
Home and Community Care Diagnosis List displays an **Active** diagnoses list and codes based on the International Classification of Diseases, 9th Revision (ICD-9) or the UNCODED description entered by the Case Manager (if no ICD-9 code is available).

Click the **Diagnoses (Active)** tab (if available) to access the Home and Community Care Diagnosis List.



Diagnosis List Preferences

The Diagnoses tab has its own set of preferences that can be accessed and configured by clicking the Preferences button in the header or by using the Preference Setup Wizard.



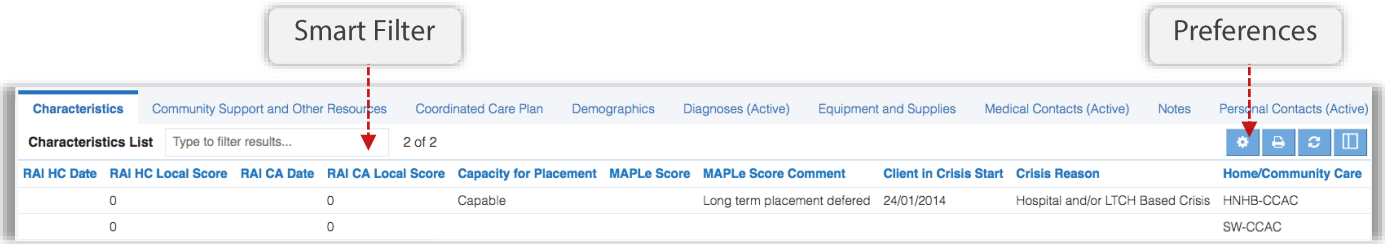
After updating your preference settings, click the **Save & Apply** button to save your changes.

To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

Characteristics

Characteristics displays information relating to the patient's ability to be placed. This includes assessment results used by Home and Community Care.

Click the **Characteristics** tab (if available) to access Characteristics information.

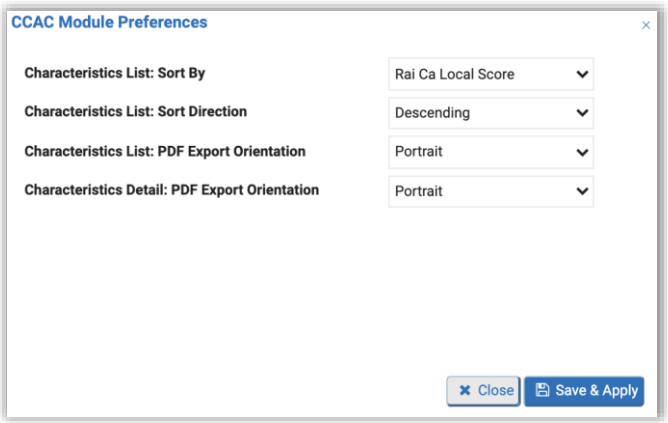


The following table provides a summary of some of the key features of the Characteristics tab.

Feature	Summary
Resident Assessment Instrument (RIA) Home Care (HC) Local Score	Displays score if available: • **Score 1 to 7** – Indicates low needs/low Alternate Level of Care (ALC) risk. • **Score 8 to 10** – Indicates moderate needs/low ALC risk. • **Score 11 to 15** – Indicates a high needs/ALC risk. • **Score 16+** – Indicates a very high needs/ALC risk.
Resident Assessment Instrument (RIA) Contact Assessment (CA) Local Score	Displays score if available.
Capacity for Placement	Will display as Capable, Incapable, Unknown, or blank (if not completed).
MAPLe Score	This is a method of assigning priority levels based on the measurement of functional, cognitive and environmental problems. (Example: Low –Very High).
MAPLe Score Comment	This is entered by the Home and Community Care Case Coordinator and provides further details related to the MAPLe Score.

Characteristics Preferences

The Characteristics tab has its own set of preferences that can be accessed and configured by clicking the Preferences button in the header or by using the Preference Setup Wizard.



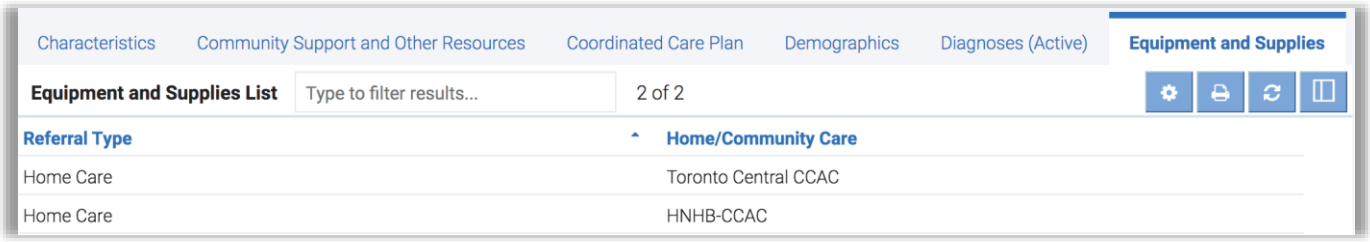
After updating your preference settings, click the **Save & Apply** button to save your changes.

To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

Equipment and Supplies List

The Equipment and Supplies List displays equipment and supplies purchased or rented by the client to assist with recovery, rehabilitation, or management of their conditions. This tab will contain any information available from the acCDR if the patient has HCC services from beyond south west Ontario. The Home/Community Care column will display the name of the regional HCC.

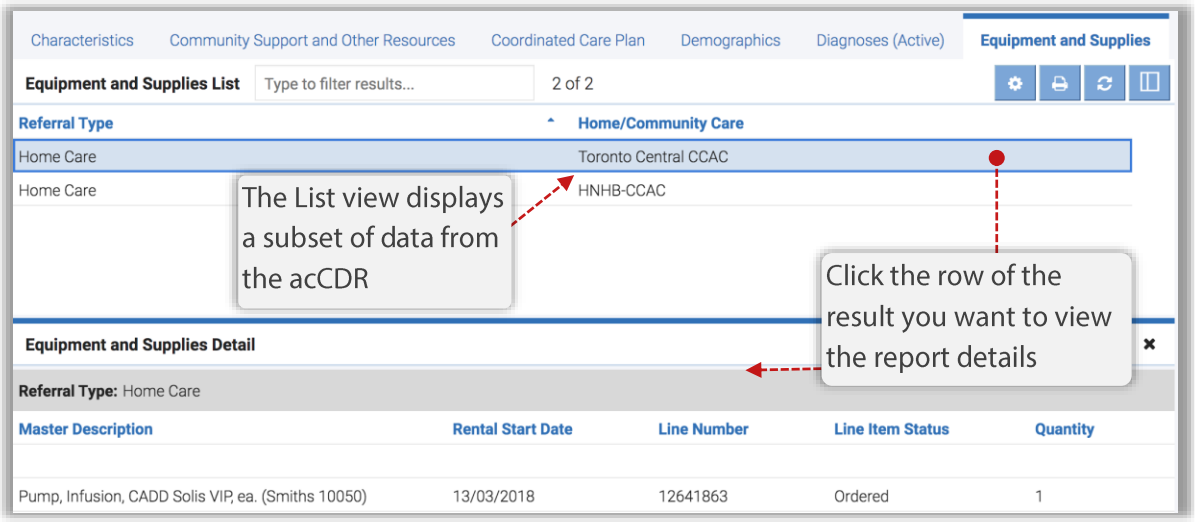
Click the **Equipment and Supplies List** tab (if available) to access the Equipment and Supplies List.



Viewing Equipment and Supplies Details

Click the row of the equipment or supply item you want to view more details.

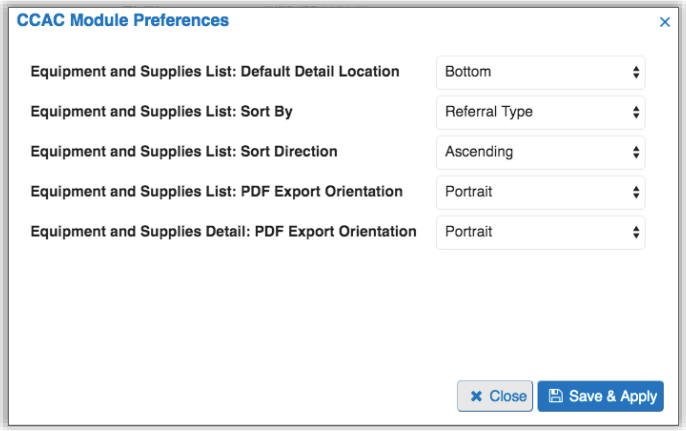
Depending on your preference settings, the Equipment and Supplies Detail window will display to the right of the orders list or below the orders list.



Click the **Close** button to close the Equipment and Supplies Detail screen.

Equipment and Supplies List Preferences

The Equipment and Supplies List tab has its own set of preferences that can be accessed and configured by clicking the Preferences button in the header or by using the Preference Setup Wizard.



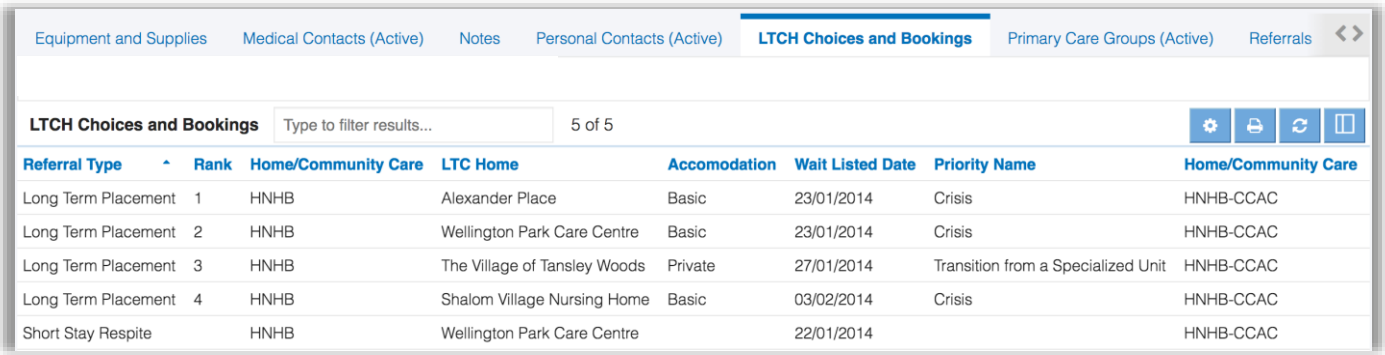
After updating your preference settings, click the **Save & Apply** button to save your changes.

To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

LTCH Choices and Bookings

The Long-Term Care (LTC) Choices and Bookings tab displays all long-term care placement referrals for the client as well as current waitlist placements for long-term care based on the client's preferred selection of LTC facilities.

Click the **LTCH Choices and Bookings** tab (if available) to access LTCH Choices and Bookings.



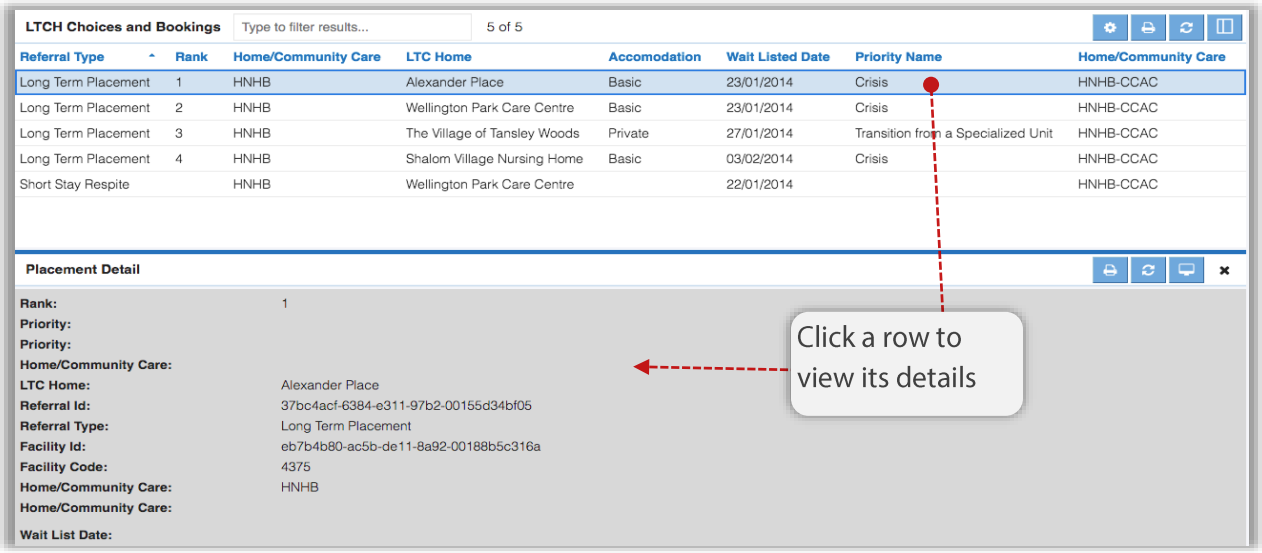
Referral Type	Rank	Home/Community Care	LTC Home	Accomodation	Wait Listed Date	Priority Name	Home/Community Care
Long Term Placement	1	HNHB	Alexander Place	Basic	23/01/2014	Crisis	HNHB-CCAC
Long Term Placement	2	HNHB	Wellington Park Care Centre	Basic	23/01/2014	Crisis	HNHB-CCAC
Long Term Placement	3	HNHB	The Village of Tansley Woods	Private	27/01/2014	Transition from a Specialized Unit	HNHB-CCAC
Long Term Placement	4	HNHB	Shalom Village Nursing Home	Basic	03/02/2014	Crisis	HNHB-CCAC
Short Stay Respite		HNHB	Wellington Park Care Centre		22/01/2014		HNHB-CCAC

The following table provides a summary of some of the key features of the LTCH Choices and Bookings tab.

Feature	Summary
Referral Type	Example of Referral Types include: Home Care School Other Reimbursement Programs Long Term Placement Short Stay – Interim Short Stay – Convalescent Care Short Stay Respite Complex Care Behavioural Health Complex Care End of Life Complex Care Medically Complex Complex Care Restorative
Rank	Indicates ranking as identified by the client and family.
Priority Name	Based on the Home and Community Care needs assessment. Entry can include: • **1 – Crisis -** People who need immediate admission to long-term care and cannot have their needs met at home, or who are in hospital, when hospital is in crisis. People in long-term care home that is closing within 12 weeks. • **2 – Spouse/Partner Reunification** – Transition from a Specialized Unit People who need to be reunified with their spouses/partners who are currently residing in a long-term care home, and who meet eligibility requirements (including care needs). • **3A - 4A + Ethno-Cultural/Religious choice** People waiting for a long-term care home serving those of a particular religion, ethnic origin or culture. People who have high care needs, but can still be supported at home until a bed becomes available. People in hospital waiting for long-term care. People in a long-term care home seeking transfer to their home of choice. • **3B – 4B + Ethno-Cultural/Religious choice** People waiting for a long-term care home serving those of a particular religion, ethnic origin or culture. People with care needs who are currently managing at home with supports. Wait times for clients in this category are much longer. • **4A – Comm High Needs/Hosp ALC/LTCH transfer to 1st choice** People who have high care needs, but can still be supported at home until a bed becomes available. People in hospital waiting for long-term care. People in a long-term care home seeking transfer to their home of choice. • **4B – Community/LTCH transfer to secondary choice** People with care needs who are currently managing at home with supports. Wait times for people in this category are much longer.

Viewing LTCH Choices and Bookings Details

Placements are displayed in a sortable list. Click the row item to see more details about the placement.

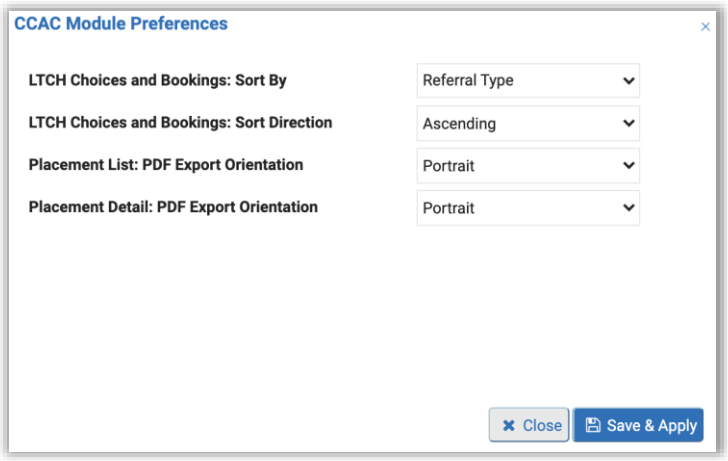


Depending on your preference settings, the Placement Detail window will either show up to the right of the LTCH Choices and Bookings list or below the LTCH Choices and Bookings list.

Click the **Close** button to close the Placement Detail screen.

LTCH Choices and Bookings Preferences

The LTCH Choices and Bookings tab has its own set of preferences that can be accessed and configured by clicking the Preferences button in the header or by using the Preference Setup Wizard.



After updating your preference settings, click the **Save & Apply** button to save your changes.

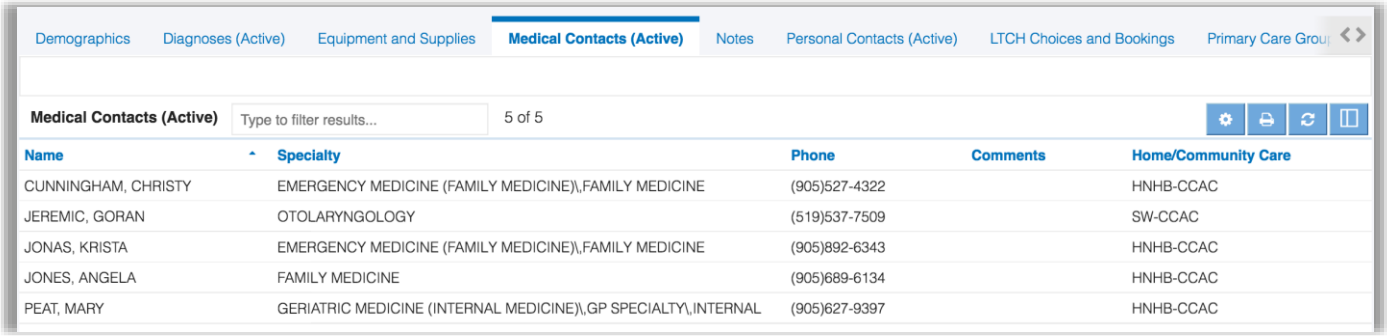
To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

Medical Contacts (Active)

Medical Contacts displays all provider contact information available from the source Home and Community Care group associated with the client. Medical contacts include a list of **Active** physicians and their specialty involved in the client's care based on the information provided by Home and Community Care.

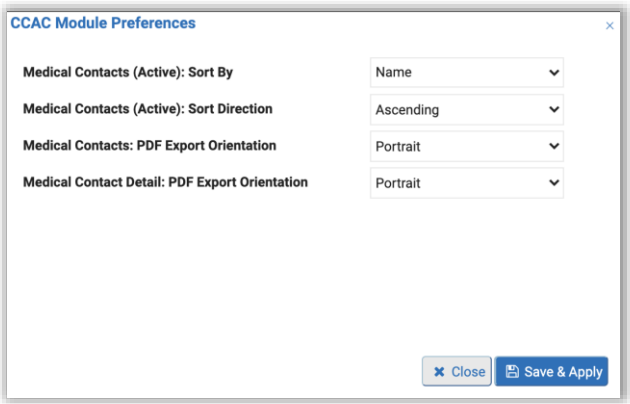
If there are no active medical contacts for the patient, the message **Inactive contacts have been filtered** is displayed.

Click the **Medical Contacts (Active)** tab (if available) to access Medical Contacts information.



Medical Contacts Preferences

The Medical Contacts tab has its own set of preferences that can be accessed and configured by clicking the Preferences button in the header or by using the Preference Setup Wizard.



After updating your preference settings, click the **Save & Apply** button to save your changes.

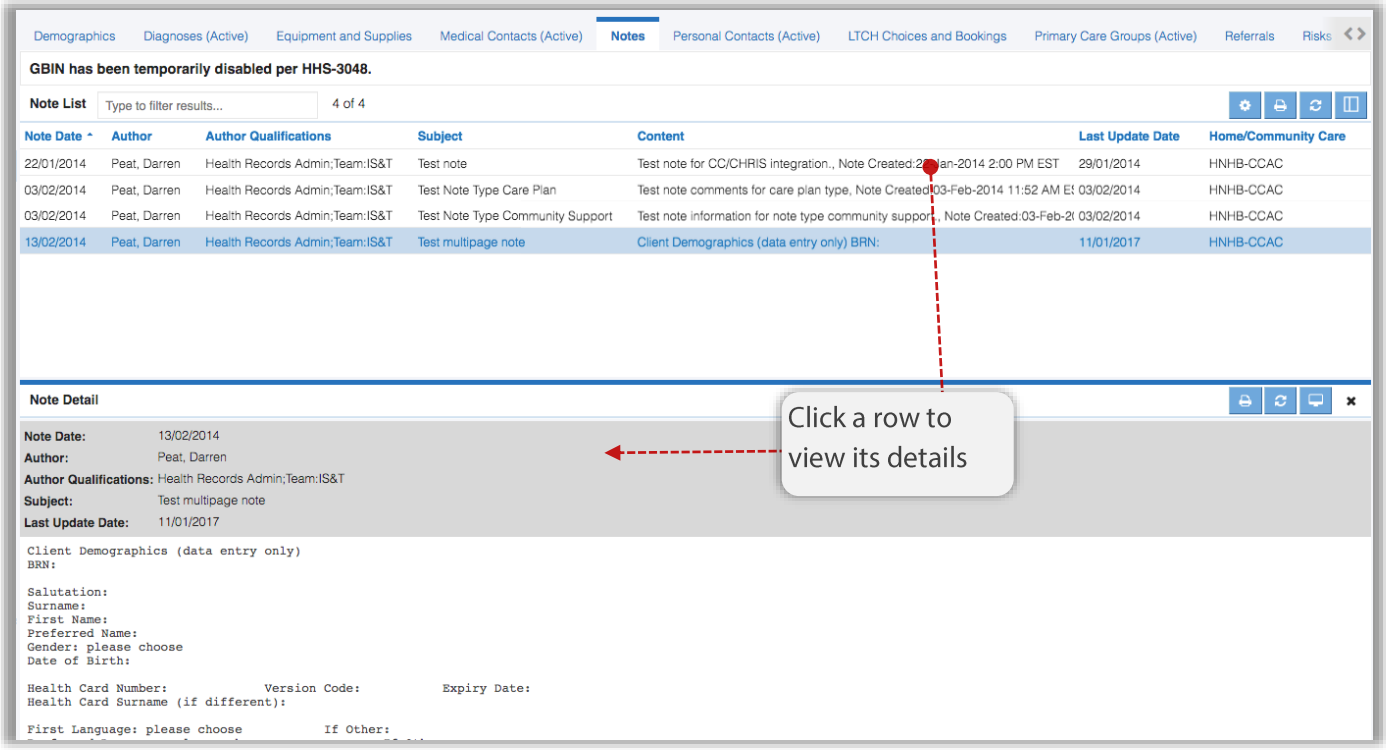
To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

Notes

Home and Community Care staff can include a care note in a client's record. If a note has been shared by Home and Community Care it will be available in ClinicalConnect. This tab contains any information available from the acCDR if the patient has HCC services from beyond south west Ontario. The Home/Community Care column will display the name of regional HCC.

Viewing Note Details

To view the note details, select click the note from the list.

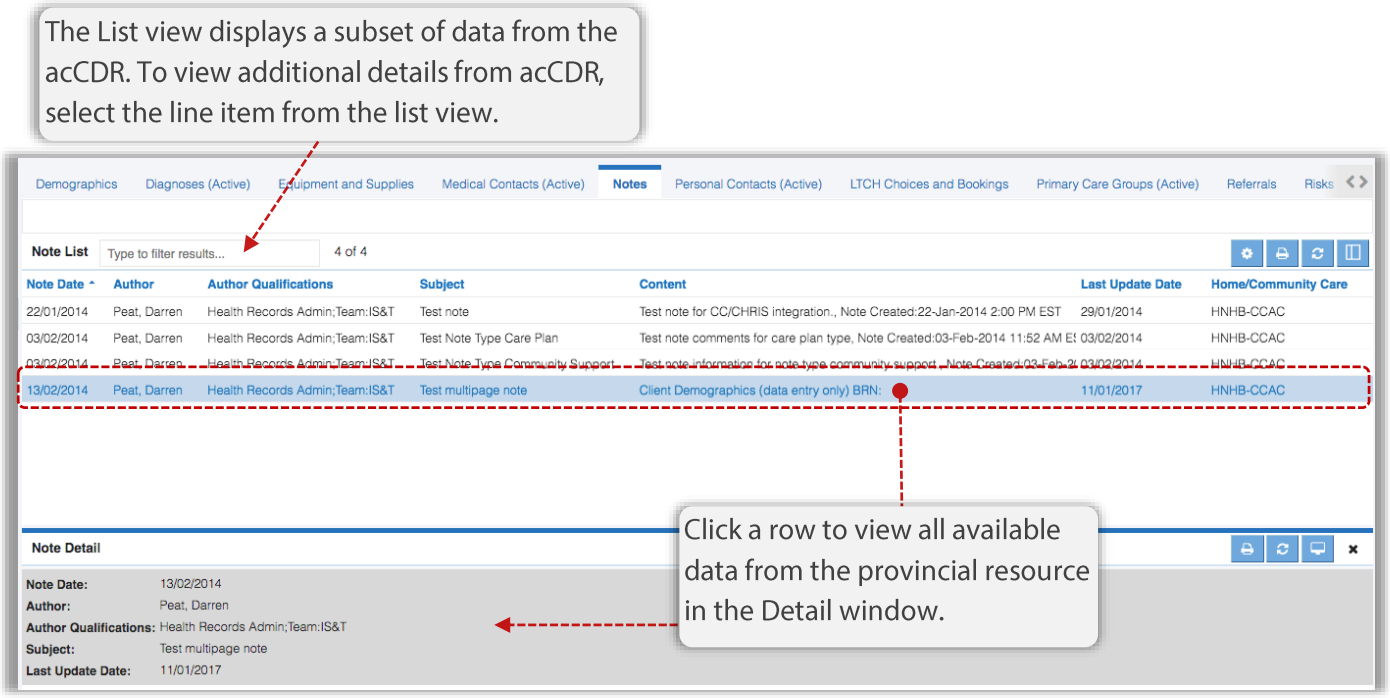


Depending on your preference settings, the Note Detail window will either show up to the right of the orders list or below the orders list.

Click the **Close** button to close the Note Detail screen.

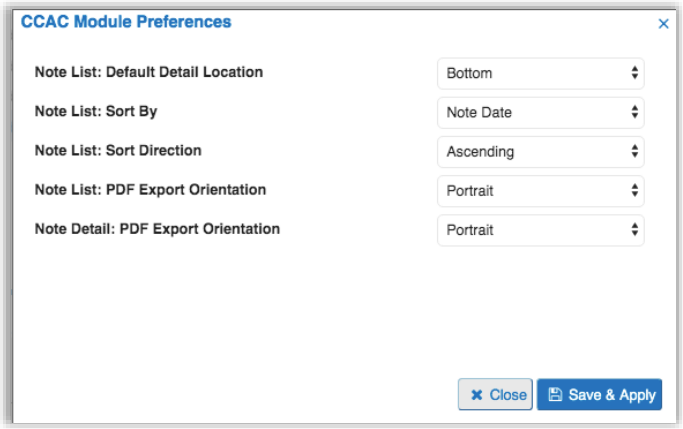
Note Details for HCC Services from Beyond South West Ontario (acCDR data)

The List view displays a subset of data from the acCDR in this module. To display additional Note details available from this provincial repository, click the line item to view the detail window.



Note Preferences

The Notes tab has its own set of preferences that can be accessed and configured by clicking the Preferences button in the header or by using the Preference Setup Wizard.



After updating your preference settings, click the **Save & Apply** button to save your changes.

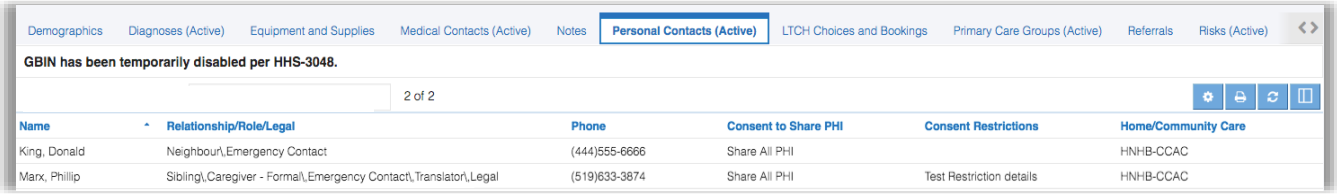
To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

Personal Contacts (Active)

Personal Contacts displays caregivers and other contacts associated with the client's care. The information in this tab displays personal contacts that are designated as **Active** primary personal contact by the contributing Home and Community Care.

Click the **Personal Contacts (Active)** tab (if available) to access Personal Contacts information.

If there are no active personal contacts for the patient, the message **Inactive contacts have been filtered** is displayed.

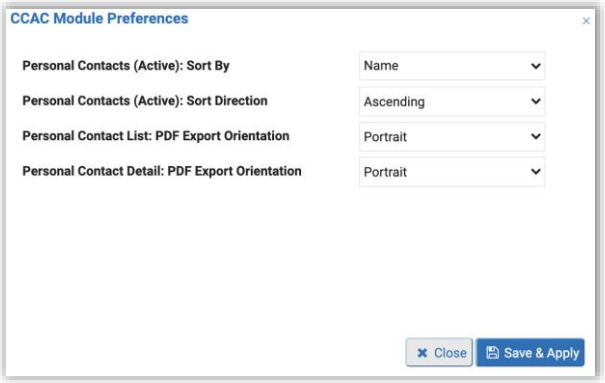


The following table provides a summary of some of the key features of the Personal Contacts tab.

Feature	Summary
Roles and Legal Contacts	The types of active roles, legal contacts, and relationship contacts may include: **Roles:** Caregiver – Formal Caregiver – Informal Children's Aid Society Correspondent Emergency Contact Land Lord / Land Lady ODSP Contact Parole Officer Superintendent Teacher Translator **Legal Roles:** Lawyer Legal Guardian Other Legal Oversight POA – Personal Care POA –Personal Care (Jointly & Severally) POA –Personal Care (Jointly) POA – Finances & Property POA – Finances & Property (Jointly & Severally) POA – Finances & Property (Jointly) Public Guardian Trustee – Finances Public Guardian Trustee – Personal Care Public Trustee Substitute Decision Maker **Relationship Contacts:** Aunt Brother Brother in Law Child Cousin Daughter Daughter in Law Father Father in Law Foster Parent Friend Grandchild Grandparent Mother Mother in Law Neighbour Niece/Nephew Other Other Relative Parent Sibling Sister Sister in Law Son Son in Law Spouse/Life Partner Step Daughter Step Parent Step Son Uncle
Consent to Share Personal Health Information (PHI)	Option include: • Share All PHI • Share Limited PHI • Share NO PHI

Personal Contacts Preferences

The Personal Contacts tab has its own set of preferences that can be accessed and configured by clicking the Preferences button in the header or by using the Preference Setup Wizard.

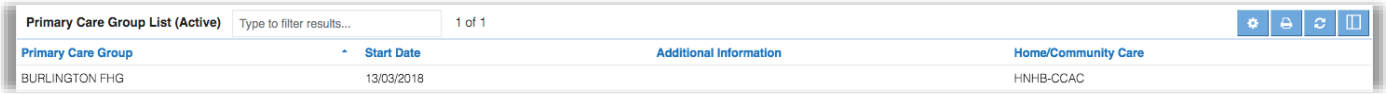


After updating your preference settings, click the **Save & Apply** button to save your changes.

To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

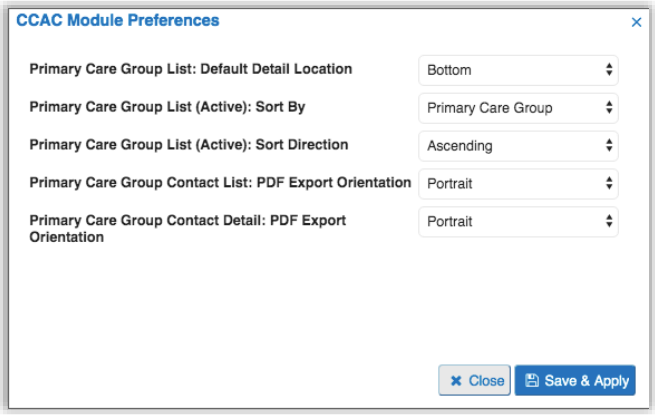
Primary Care Group (Active)

The Primary Care Group displays the Active primary care groups. Click the **Primary Care Group List (Active)** tab (if available) to access the Primary Care Group.



Primary Care Group Preferences

The Primary Care Group tab has its own set of preferences that can be accessed and configured by clicking the Preferences button in the header or by using the Preference Setup Wizard.



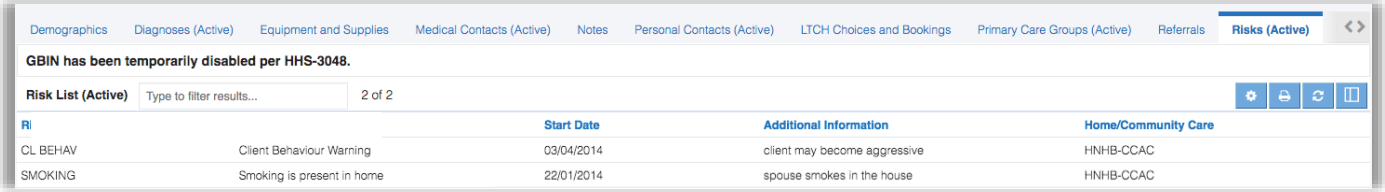
After updating your preference settings, click the **Save & Apply** button to save your changes. To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

Risks (Active)

The Risk List displays any Active behaviors or risks associated with the client or in the client's home that presents a risk to care management, Home and Community Care providers, or other service providers.

This tab will contain any information available from the acCDR if the patient has HCC services from beyond south west Ontario. The Home/Community Care column will display the name of LHIN HCC.

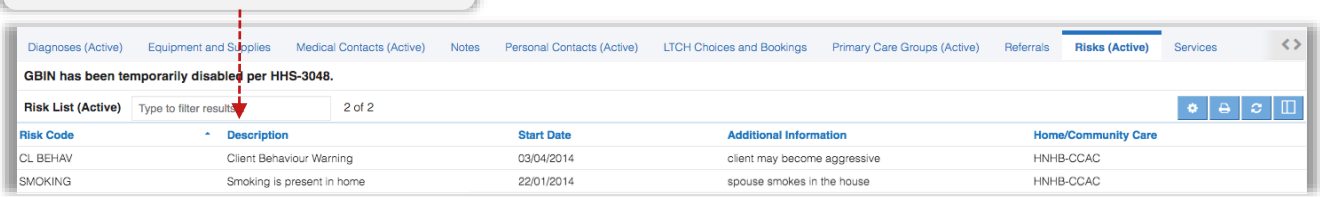
Click the **Risks (Active)** tab (if available) to access the Risk List.



Risk Details for HCC Services from Beyond South West Ontario (acCDR data)

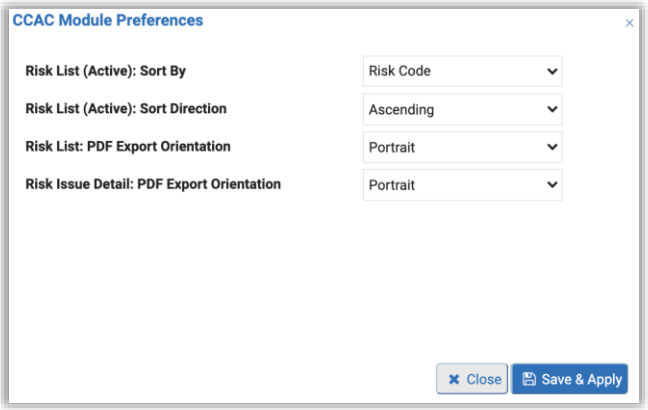
The List view displays a subset of data from the acCDR in this module. To display additional Risk details available from this provincial repository, click the line item to view the detail window.

HCC services from beyond South West Ontario will not display all data in the List view.



Risk List Preferences

The Risks tab has its own set of preferences that can be accessed and configured by clicking the Preferences button in the header or by using the Preference Setup Wizard.



After updating your preference settings, click the **Save & Apply** button to save your changes.

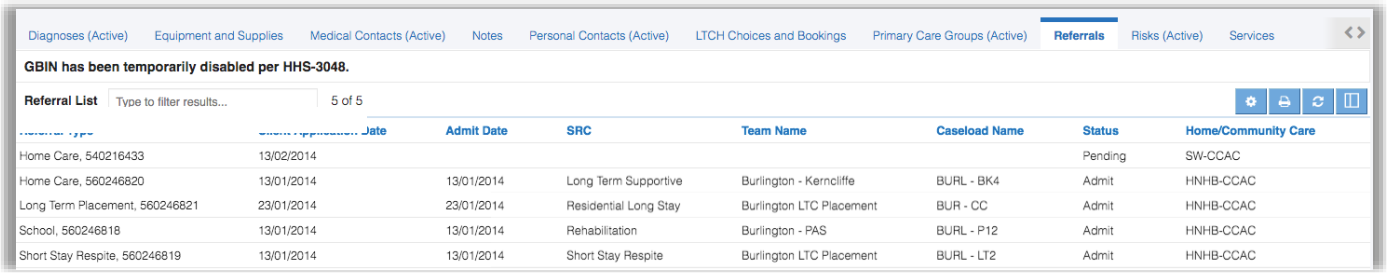
To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

Referrals

The Referral List displays the patient's referrals based on the status of Pending, Admitted or Discharged referrals.

This tab will contain any information available from the acCDR if the patient has HCC services from beyond south west Ontario. The Home/Community Care column will display the name of LHIN HCC.

Click the **Referral** tab (if available) to access the Referral List.



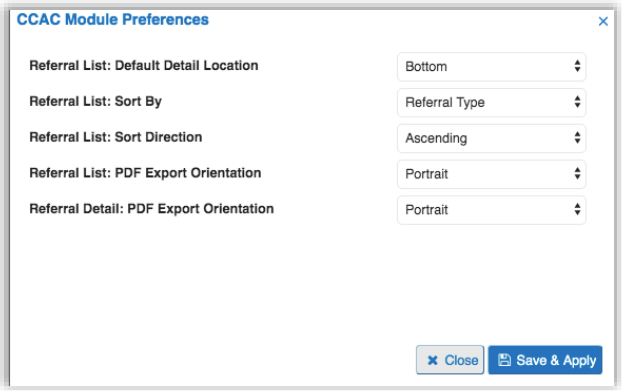
		Admit Date	SRC	Team Name	Caseload Name	Status	Home/Community Care
Home Care, 540216433	13/02/2014					Pending	SW-CCAC
Home Care, 560246820	13/01/2014	13/01/2014	Long Term Supportive	Burlington - Kerncliffe	BURL - BK4	Admit	HNHB-CCAC
Long Term Placement, 560246821	23/01/2014	23/01/2014	Residential Long Stay	Burlington LTC Placement	BUR - CC	Admit	HNHB-CCAC
School, 560246818	13/01/2014	13/01/2014	Rehabilitation	Burlington - PAS	BURL - P12	Admit	HNHB-CCAC
Short Stay Respite, 560246819	13/01/2014	13/01/2014	Short Stay Respite	Burlington LTC Placement	BURL - LT2	Admit	HNHB-CCAC

The following table provides a summary of some of the key features of the Risks tab.

Feature	Summary
Service Recipient Code (SRC)	As defined by Home and Community Care. Examples: Acute Maintenance, Rehab, Short Term Respite.
Status	As defined by Home and Community Care. Status can include Active, Pending, or Discharged.

Referral List Preferences

The Referrals tab has its own set of preferences that can be accessed and configured by clicking the Preferences button in the header or by using the Preference Setup Wizard.



After updating your preference settings, click the **Save & Apply** button to save your changes.

To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

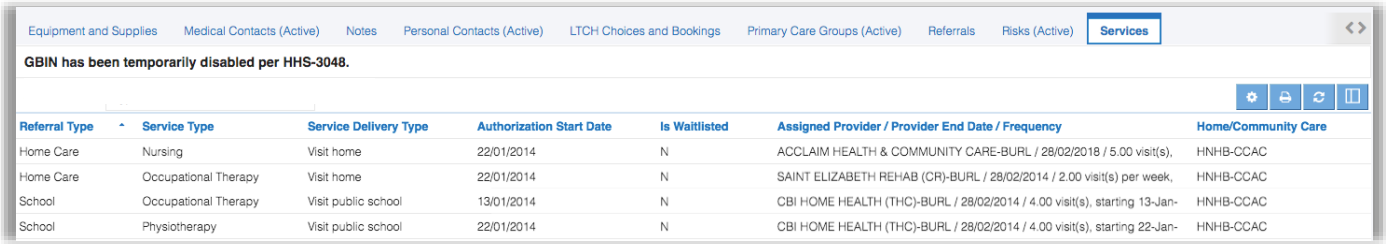
Service List

The Service List displays a list of current and past Home and Community Care services from the current Home and Community Care client file. If there are changes to the service provider, start and end date, or service frequency, a new line item displays in the service list.

This tab will contain any information available from the acCDR if the patient has HCC services from beyond south west Ontario. The Home/Community Care column will display the name of LHIN HCC.

Click the **Services** tab (if available) to access Service List information.

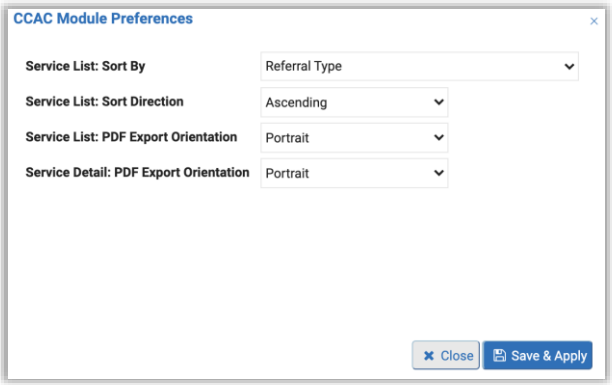
The service type 'start' and 'end' dates are listed in the service line details. The most recent date is listed first.



Referral Type	Service Type	Service Delivery Type	Authorization Start Date	Is Waitlisted	Assigned Provider / Provider End Date / Frequency	Home/Community Care
Home Care	Nursing	Visit home	22/01/2014	N	ACCLAIM HEALTH & COMMUNITY CARE-BURL / 28/02/2018 / 5.00 visit(s),	HNHB-CCAC
Home Care	Occupational Therapy	Visit home	22/01/2014	N	SAINT ELIZABETH REHAB (CR)-BURL / 28/02/2014 / 2.00 visit(s) per week,	HNHB-CCAC
School	Occupational Therapy	Visit public school	13/01/2014	N	CBI HOME HEALTH (THC)-BURL / 28/02/2014 / 4.00 visit(s), starting 13-Jan-	HNHB-CCAC
School	Physiotherapy	Visit public school	22/01/2014	N	CBI HOME HEALTH (THC)-BURL / 28/02/2014 / 4.00 visit(s), starting 22-Jan-	HNHB-CCAC

Service List Preferences

The Services tab has its own set of preferences that can be accessed and configured by clicking the Preferences button in the header or by using the Preference Setup Wizard.



After updating your preference settings, click the **Save & Apply** button to save your changes.

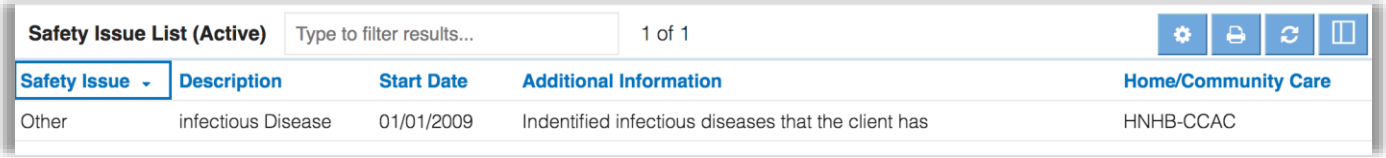
To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

Safety Issue List (Active)

The Safety Issue List displays any **Active** item that presents a safety issue for the client as well as the Home and Community Care service provider.

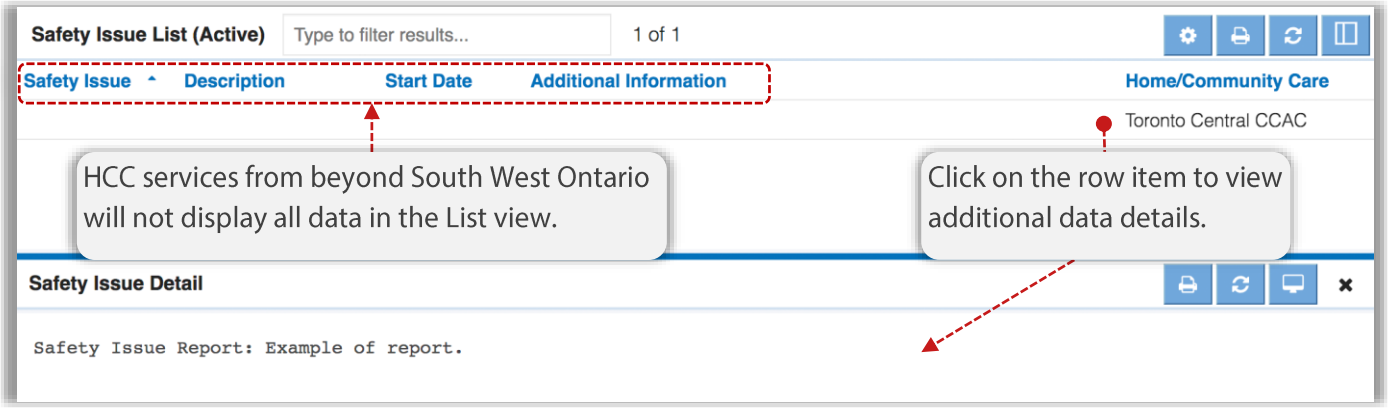
This tab will contain any information available from the acCDR if the patient has HCC services from beyond south west Ontario. The Home/Community Care column will display the name of LHIN HCC.

Click the **Safety Issue List (Active)** tab (if available) to access the Safety Issue List.



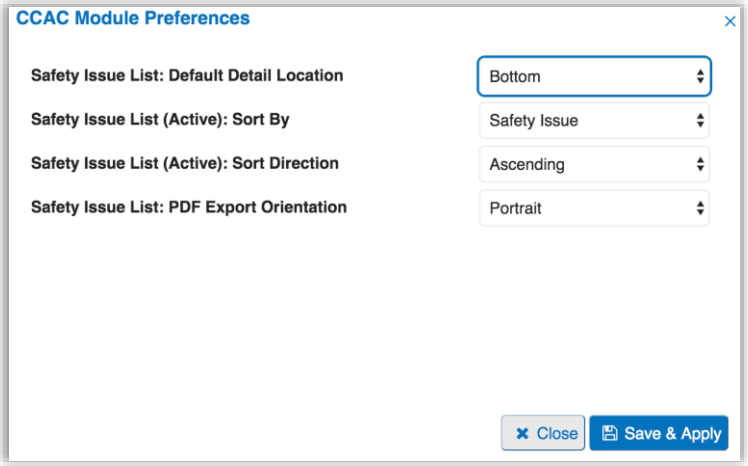
Safety Issue Details for HCC Services from Beyond South West Ontario (acCDR data)

The List view displays a subset of data from the acCDR in this module. To display additional Safety Issue details available from this provincial repository, click the line item to view the detail window.



Safety Issue List Preferences

The Safety Issue List tab has its own set of preferences that can be accessed and configured by clicking the Preferences button in the header or by using the Preference Setup Wizard.



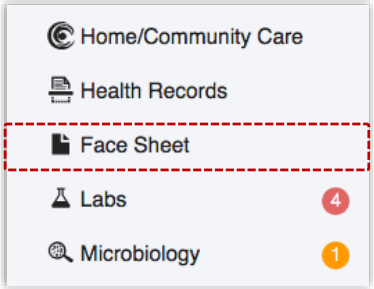
After updating your preference settings, click the **Save & Apply** button to save your changes.

To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

Face Sheet Module

Show Me

Ask a Question



The Face Sheet module provides a one-page summary of the patient's selected visit information. The information provided in each Face Sheet varies depending on the patient's visit.

To access the Face Sheet module, click the **Face Sheet** option from the Clinical Modules menu.

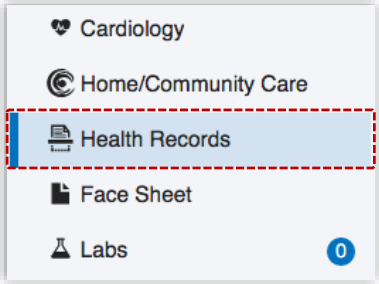
To view a Face Sheet from a different encounter, select the **Visits** module then click another patient encounter or click a different encounter directly from the Patient Visits Timeline.

The Face Sheet module is not applicable when accessing Home and Community Care (HCC) patient encounters and will not be displayed.

Face Sheet information from an Emergency Department type of encounter will contain the Hospital Facility field and the Emergency Physician Name as shown in the following example.

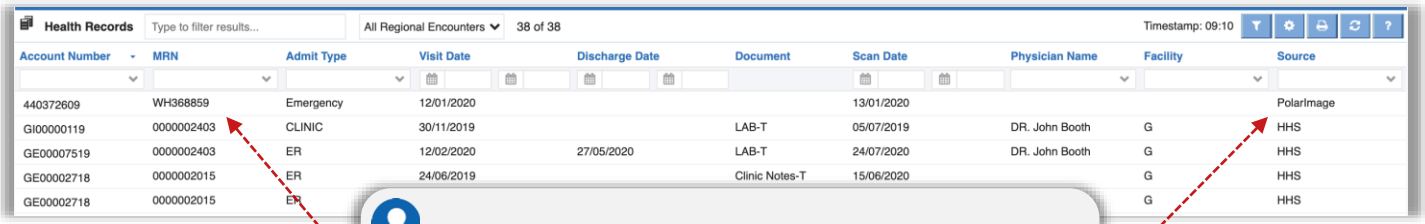
Health Records

The Health Records module contains scanned documents from historical (archived) patient visits.



The Health Records data is integrated from Hamilton Health Sciences (HHS), Niagara Health System (NHS) and the Woodstock Hospital as shown in the example below.

To access the Health Records module, click the **Health Records** option from the Clinical Modules menu.



Health Records data from the **Woodstock Hospital** will display with Medical Record Numbers that begin with **WH** and the Source column will show "PolarImage".

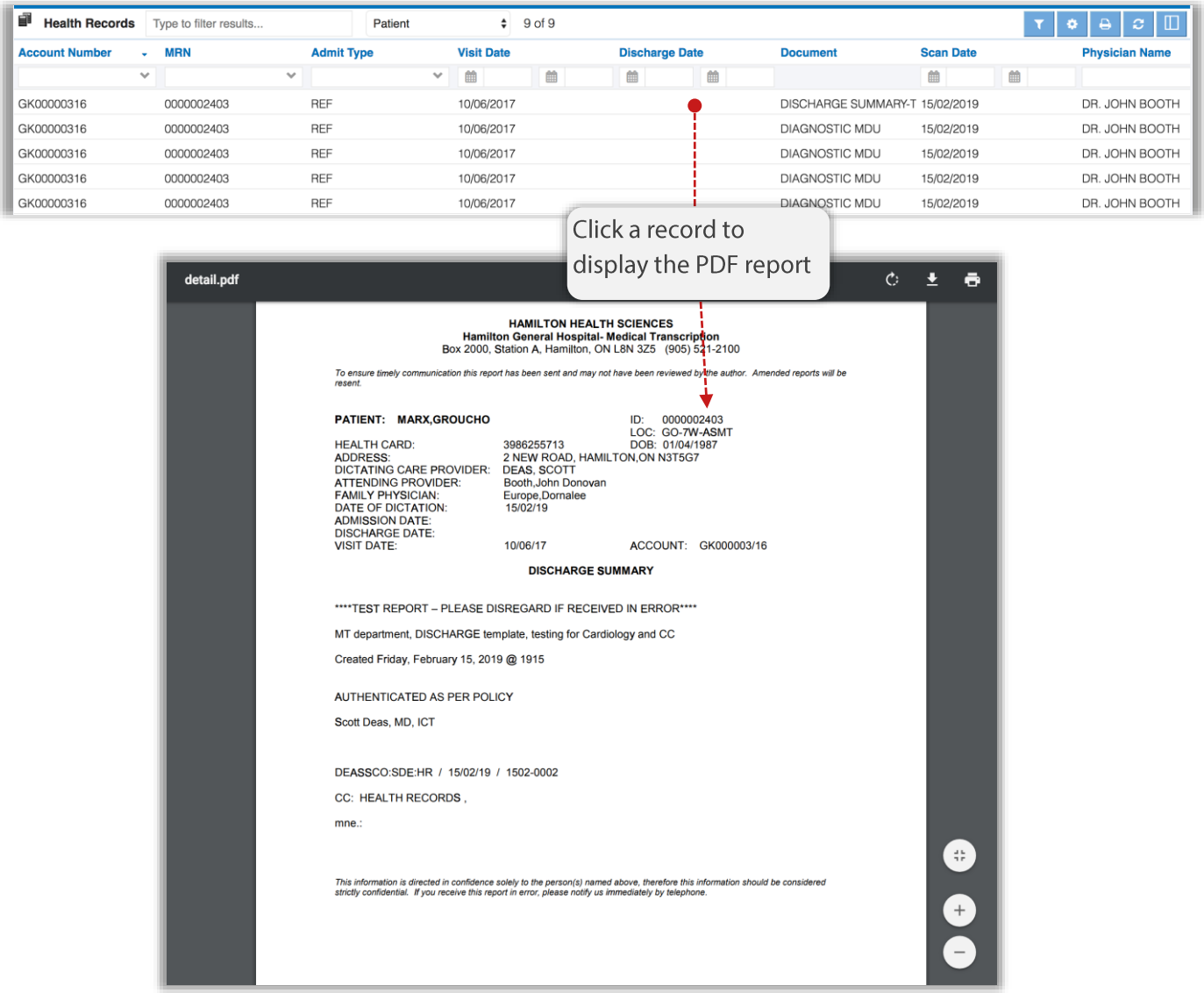
An error message may present when accessing Health Records from select facilities indicating that data could not be accessed from the source site due to limited licenses. In this case, users should wait a few seconds and try again.

The document list of health records can be sorted using the Smart Filter, Encounter or by clicking any of the column headers in this view to sort the entire list by the contents under that column, in either ascending or descending order.

Viewing Health Records Documents

To view a health record:

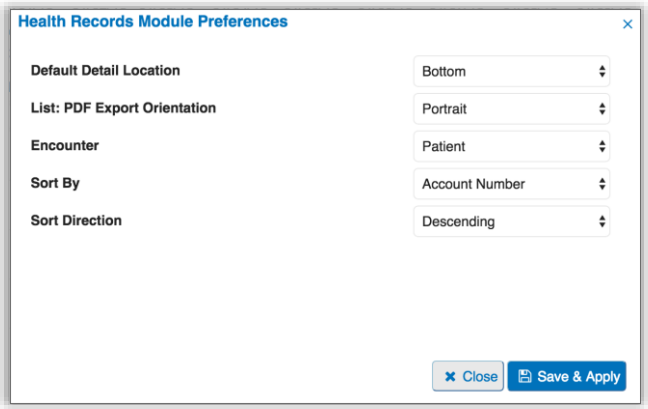
1. Click the row of the document you want to view.
2. Health record documents are displayed in PDF in your browser window.



3. Close the PDF to return to the health records list.

Health Records Preferences

The Health Records module has its own set of preferences that can be accessed and configured by clicking the Preferences button in the module header or through the Preference Setup Wizard.



After updating your preference settings, click the **Save & Apply** button to save your changes.

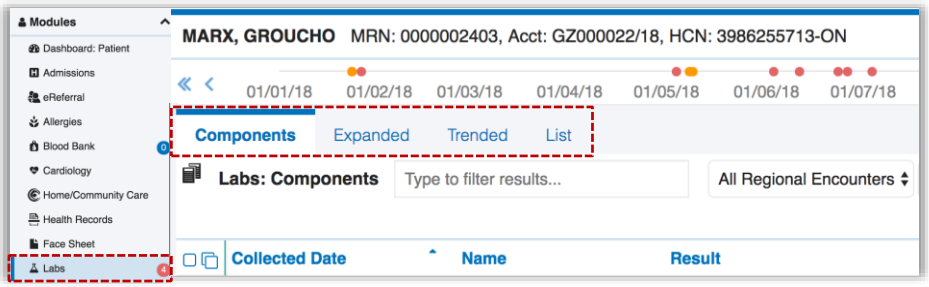
To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

Labs Module

Show Me

Ask a Question

The Labs module display patient's lab results in four different views; Components, Expanded, Trended and List. ClinicalConnect users can customize their preferred default view as needed. The **Ontario Laboratories Information System (OLIS)** data is integrated into all Lab views and will display if the Encounter filter is set to "**All Regional Encounters**".



The Labs Module views include:

Components View - This view displays individual test and lab panel components such as Leukocytes, Hemoglobin, and Platelets which are part of the Complete Blood Count (CBC) panel along with the result values. This view is useful for clinicians who need to review and/or trend specific lab components that may be part of Lab panels (e.g. CBC, Electrolytes, Liver Enzymes) all in one view without having to expand multiple panels from the List view to find a specific component. Sorting or filtering labs in this view must be done by the lab test or component name rather than the panel name.
Note: Some component (analytes) names may differ between Labs.

Expanded View – This view displays individual test and lab panels such as a CBC including all of the associated components and results. This view is useful for clinicians who prefer to see labs grouped by panels but also be able to see the panel component results all at once. Filtering and sorting can be done by specific test, component and panel name. To graph results from this view, select the labs required to trend first then click on a lab test to display the graphed results below the test name.

Trended view – This view displays lab results including components that are part of a panel, to the left with date columns to the right. This allows clinicians to scroll down the result list and advance through the date columns from Newest to Oldest or the reverse based on their preference settings. Clicking a lab will display the graphed results below the test name.

List View – This view displays lab tests and lab panels such as a CBC in a list where abnormal results are coloured in orange. To view the associated lab result details for any listed test or lab panel (component), the test or panel name must be selected from the list and then viewed in the details screen. Sorting or filtering labs in this view must be done by the lab test or panel name rather than the component.

New Results Flags in Labs

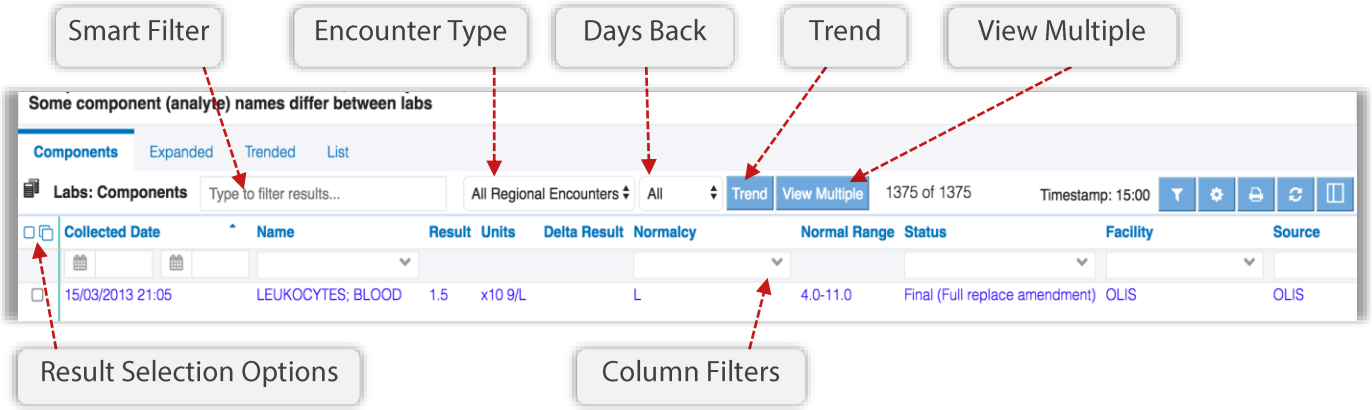
If the New Results flag for the Lab module is enabled (as defined by the user preferences in the New Results Module), the module will display a new results indicator (as shown above) for the selected encounter. In addition to the module indicator, each new test in the List and Expanded views will also have a "New Results" flag (as defined by the user's preference settings). New Result flags are not available in the Lab Trended or Components views.
Refer to the New Results section to learn more about how new results are flagged.

OLIS data does not generate a new result flag and is not available in the New Results module. The New Results indicator is also not available in the Labs Component list and Labs Trended list views.

To access the Labs module, click the Labs option from the Clinical Modules menu.

Lab View Features

Each lab view displays results in a different layout, but still shares many common features.

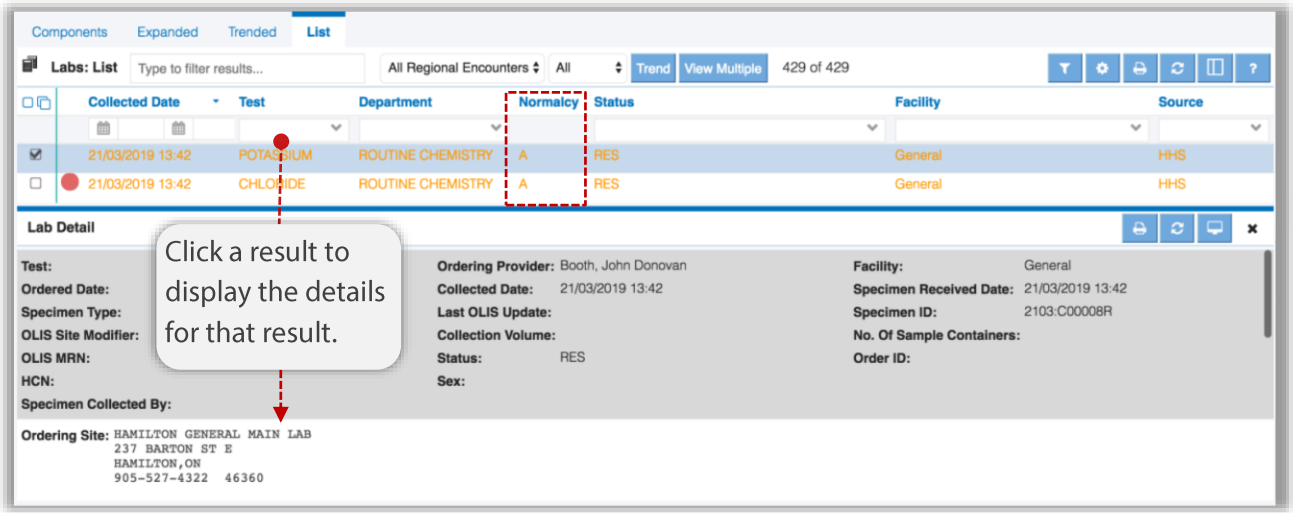


The following table provides a summary of some of the key features found in each lab view.

Feature	Summary
Trend	The Trend button is used to trend multiple lab results from multiple source systems based on the user's defined "Days Back" preference setting. These trended results can then be displayed in a graph if needed. Results will not be trended together if the units of measure are different. In cases where Labs may be named differently across source Lab systems e.g. CBC or Complete Blood Count, both of these tests will need to be selected to be included in the 'Trend' function.
View Multiple	Allows you to select and view multiple lab result details in a single Lab Details window.
Result Selection Options 	These options allow users to selecting multiple lab results from the view if needing to **Trend** or **View Multiple** labs. **Check All/Uncheck All** – this is used to select or deselect all labs in the view. **Select Similar (Enabled)** – When enabled, this is used to select all instances of the test with the same name from all available source systems including OLIS if the 'Encounter' filter is set to "All Regional Encounters". When enabled, you can click the checkbox of one lab and all other labs with the same name will automatically be selected. **Select Similar (Disabled)** - If this is disabled, then each test must be selected individually.

Viewing Lab Result Details

The Component, Expanded, and List views display lab results in a sortable list. Click the row of a result to view the lab details.

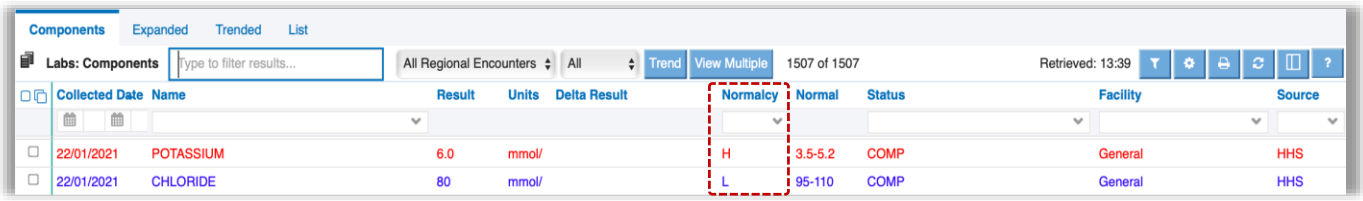


Depending on your preference settings, the Lab Details window will either display to the right of the results list or below the results list.

To customize where details are viewed on the screen, see the Navigation Layout section of this guide.

Abnormal Lab Results – In the Labs List view, abnormal lab results display in a orange text and are flagged with the Normalcy column showing "A" for abnormal.

In the Labs Components and Expanded views, the Normalcy column displays **"H"** high or **"L"** low result as shown below. Normalcy indicators are specific to each source contributing system. To view the complete lab details, select the test from the view.



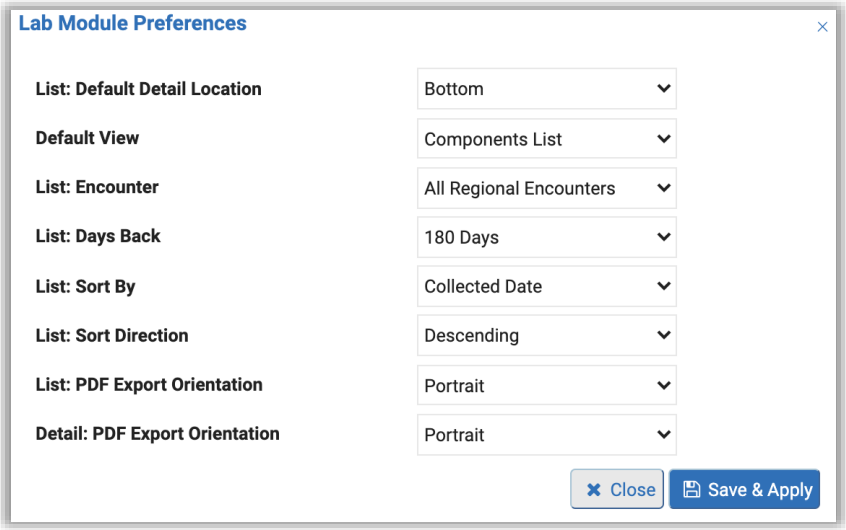
Printing Lab Details

To Print lab details:

1. Click the **Print button** in the Lab Detail header.
2. Use the browser's print window to complete the printing process (steps vary by browser).

Lab Preferences

Each lab view can be configured with its own set of preferences by clicking the Preferences button in the view header or by using the Preference Setup Wizard.



After you have updated your preference settings, click the **Save & Apply** button to save your changes.

To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

While each lab view does maintain its own set of preference, many of the preferences have the same functionality. The following table provides a summary of all available preference from each lab view.

Preference	Description
Default View ✓ Components List Expanded Trended Lab List	You can select which Lab view you want displayed by default when you first access the Labs module.
Encounter	By default, the Encounter filter is set to **All Regional Encounters** for all applicable modules in order to view data from provincial repositories if available. Options include: • **Encounter** – Displays information only for the selected encounter or visit. • **Patient** – Displays data from all encounters for the selected source hospital system (which may have multiple facilities). • **All Regional Encounters** - Displays data from all encounters across all source systems available in the portal including data from provincial repositories (if available). If you're having issues finding a lab result, make sure your Encounter is set to **All Regional Encounters**. Without this selection you will be unable to view OLIS lab results.
Days Back 1 3 ✓ 7 30 60 90 180 1 Year 5 Years All	The **Days Back** filter refers to the amount of information presented in the view based on the number of days back from the date of patient discharge. For an admitted in-patient, the Days Back filter refers to the number of days back from the current date (today). The Days Back filter in this module is set to 180 days as the default but can be changed to a maximum of ALL. However, the ALL Days Back setting may impact system performance if returning large volumes of data. Make sure that your Days back is set appropriately to include the available data in that date range. Example: If you're looking for a result that was completed two weeks ago, and the Days Back is set to 7 days, then you will not be able to see that result.
Sort By ✓ Collected Date Department Facility Normalcy Source Status Test	Allows you to set which column you want your lab results to be sorted by. The default is set to Collection Date in Descending order so that the most recent results appear at the top of the screen.

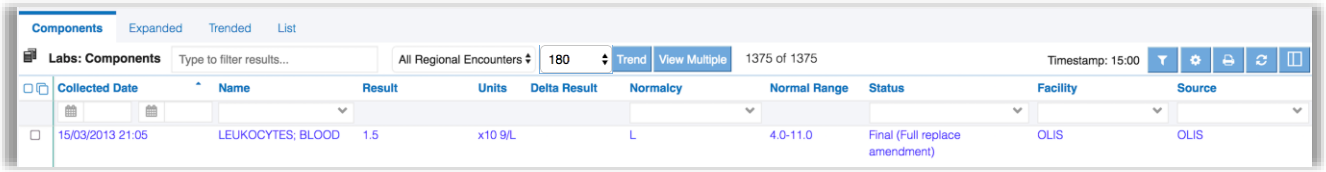
Sort Direction	Sorts the Sort By column results in Ascending or Descending order.
Trend Direction	Allows you to sort trended information from Newest to Oldest, or Oldest to Newest. This preference is only available in the Trended view.

Viewing Lab OLIS Data

Show Me

The Ontario Laboratories Information System (OLIS) is the main system used by Community Labs, Public Health Labs, and acute care hospitals in Ontario to enter and store patient lab results. ClinicalConnect has integrated information from OLIS and made it viewable in the Labs module.

To view OLIS lab data make sure your Encounter preference is set to **All Regional Encounters**.



OLIS Lab Details

OLIS lab details contain information related to the test from the source labs.

In some cases, an OLIS test may display a full replace amendment indicator. A full replace amendment indicator is applied to a report when the contributing lab completely replaces the previous report. In such cases, the status field in the report details will also display **Full replace amendment**.

OLIS Limitations

There are limitations for accessing OLIS data from within ClinicalConnect. These limitations include:

- An organization must have signed up for the appropriate Ontario Health access otherwise, you will not be able to access OLIS data and OLIS data will not be listed in the modules. If the access permissions are not in place you will see the message **"OLIS matches filtered."**
- A patient's record may have a consent directive limiting some or all of their OLIS data from displaying in ClinicalConnect. This will generate the message **"Some or all of the requested OLIS laboratory information was not returned due to a patient consent directive."** OLIS restricted records cannot be overridden in ClinicalConnect.

Components View

Show Me

Click the **Components** tab to access the Components view.

Some component (analyte) names differ between labs

Components | Expanded | Trended | List

Labs: Components | Type to filter results... | All Regional Encounters | 180 Days | Trend | View Multiple | 177 of 177 | Timestamp: 13:20

Collected Date	Name	Resul	Units	Delta	Normalcy	Normal	Status	Facility	Source
22/01/2021 08:10	SODIUM	160	mmol/		*H	135-145	COMP	General	HHS
22/01/2021 08:10	POTASSIUM	6.0	mmol/		H	3.5-5.2	COMP	General	HHS
22/01/2021 08:10	CHLORIDE	120	mmol/		H	95-110	COMP	General	HHS
22/01/2021 08:10	ANION CATION GAP	20	mmol/		H	5-17	COMP	General	HHS

The Components View displays individual lab panel components, such as Leukocytes, Hemoglobin, and Hematocrit (which are part of the Complete Blood Count panel). This view is useful if you need to review or trend individual lab components that are part of the larger lab panel without having to expand multiple panels from the List or Expanded view.

There may be some grouped tests, such as Electrolytes, that will not display results in the results list. Use the Smart Filter to search for the required components as needed (example: Sodium, Potassium, Chloride) to review their values. To view the details of the complete Lab panel from which one component in this view is part of (example: sodium is part of Lytes), click the component and the complete panel will display in the details view.

Expanded View

Show Me

Click the **Expanded** tab to access the Expanded view.

Components | Expanded | Trended | List

Labs: Expanded | Type to filter results... | All Regional Encounters | 180 Days | Trend | View Multiple | 83 of 83 | Timestamp: 13:20

Collected Date	Test	Result	Units	Delta Result	Normalcy	Normal Range	Status	Facility	Source
16/06/2021	MAGNESIUM				A		COMP	General	HHS
	MAGNESIUM	2.00	mmol/L		H	0.70-1.10	COMP	General	HHS
16/06/2021	ELECTROLYTES				A		COMP	General	HHS
	SODIUM	160	mmol/L		*H	135-145	COMP	General	HHS
	POTASSIUM	4.0	mmol/L			3.5-5.2	COMP	General	HHS
	CHLORIDE	100	mmol/L			95-110	COMP	General	HHS
	ANION CATION GAP	5	mmol/L			5-17	COMP	General	HHS

The Expanded view lists all the patient's lab tests and their related components. For example, a Complete Blood Count (CBC) panel will be listed along with each individual component, such as Hemoglobin, Mean Cell Volume, and Platelet Count and their values.

High and low lab values may not use consistent colour coding across all source systems. When reviewing lab results, refer to the reference ranges column from each contributing source system.

Trended View

Show Me

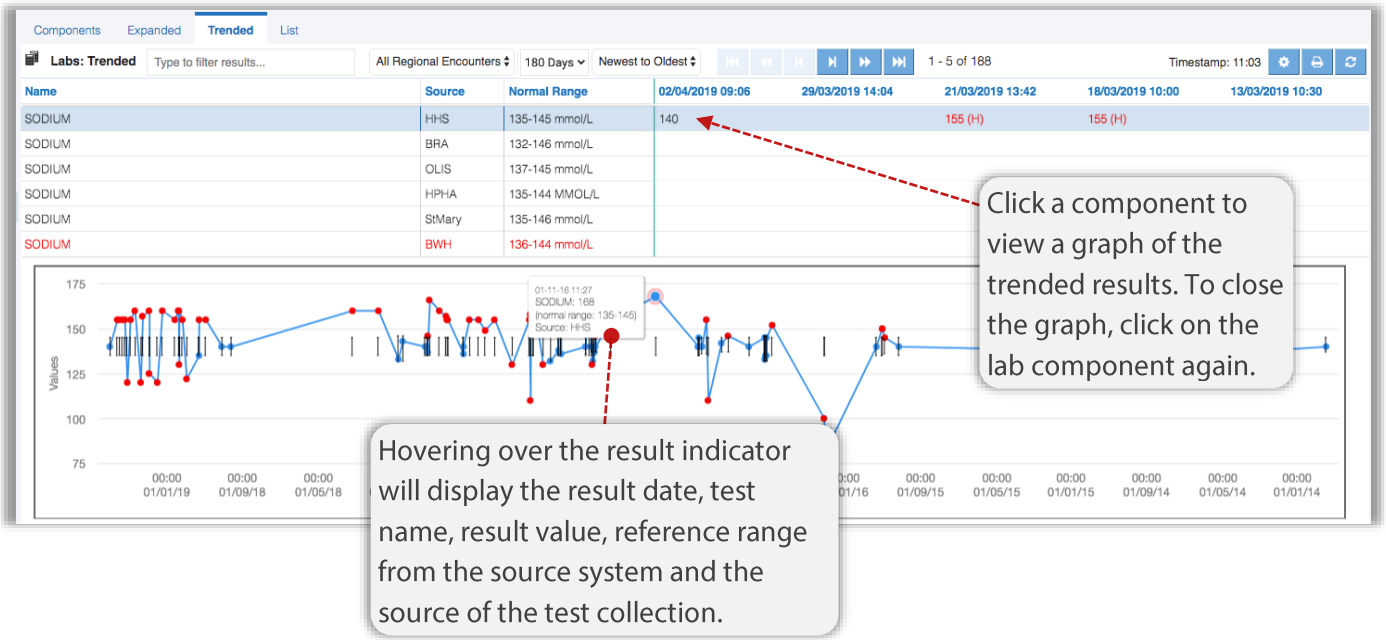
In the Trended View, lab results are listed by name with a default of "Newest to Oldest" and display the results from each source to create an easy to read graph.

Lab components may be selected for graphing as shown below. In cases where components may be named differently across source Lab systems, each component will display as a separate line item and will need to be graphed separately.

Results will not be trended together if the units of measure are different. Lab results outside of the source reference range will display in red with high (H) or blue with low (L) indicators. To trend OLIS data, set the '**Encounter**' filter to '**All Regional Encounters**'.

To view a graph with trended test results;

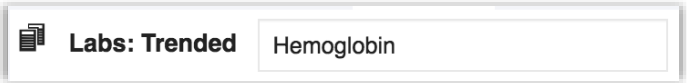
1. Click on the component you want to graph.
   The trended graph is displayed under the selected component.



The lab results are plotted on the graph and display in red if the test is abnormal - Outside of normal range. The Reference Range indicators display as vertical graph lines showing the reference range from the source system.

2. Click the same component again to hide the graph.

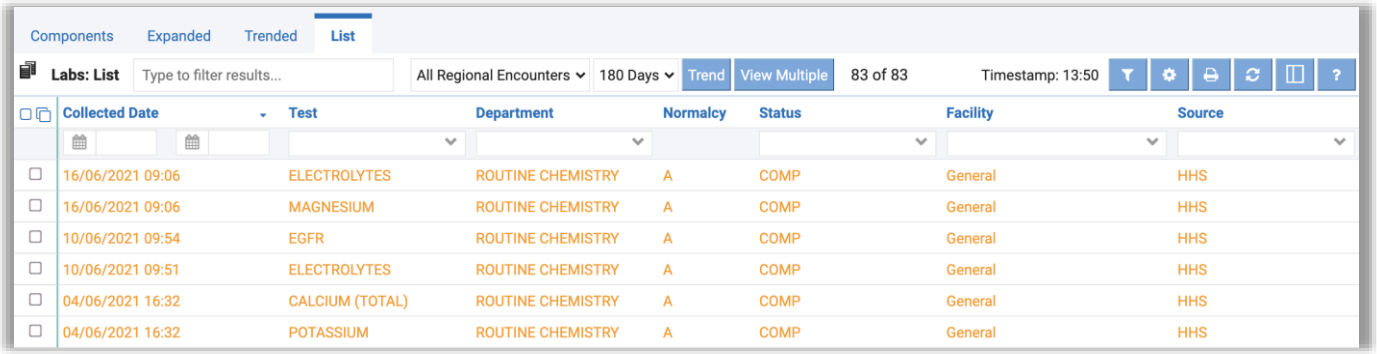
The following table provides a brief description of each column in the Trended View:

Trended View Column	Description
Name	The name of the lab component.
Source	The source of the lab test.
Normal Range	The reference range of the lab test used to determine if the result is considered high, normal, and low by the contributing source system. **Note:** Reference ranges may vary across different sources systems.
Date and Time Columns	Shows the date of each test result from each source. Use the navigation icons in the banner to advance forward or back across the date columns.
Smart Filter	Text typed in the Smart Filter **Search** box narrows the list of results to display only those related to text you entered. In following example, the Smart Filter Search box is used to narrow the list of results to display only results that included **Hemoglobin**. 

List View

Show Me

Click the **List** tab to access the List view.



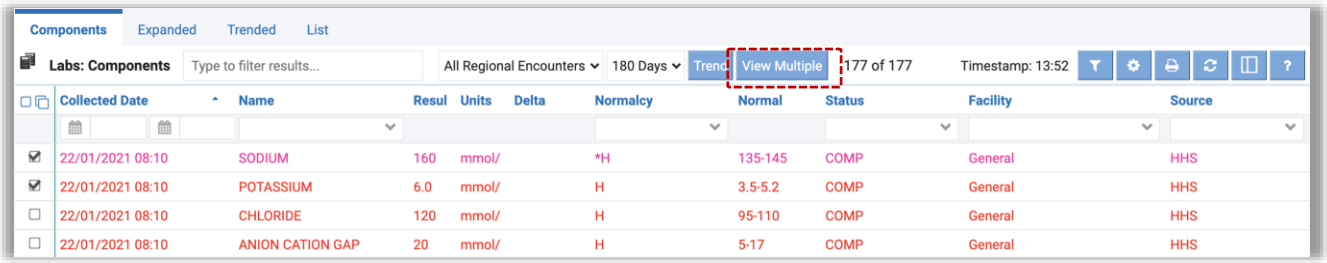
The List View displays just the name of the completed lab test. This view is useful if you don't need to see the individual components of the panel in the results view.

Selecting and Viewing Multiple Lab Result Details

The Components, Expanded, and List Views allow you to view multiple lab result details in a single Lab Details window.

To view multiple lab result details:

1. Select (check) the tests or components you want to view.
2. Click the **View Multiple** button in the Labs header.



All the details for the results you selected will be displayed in a single Lab details window as shown in the example below.

Test: COMPLETE BLOOD COUNT (HEMATOLOGY)
Ordered Date: 13/02/2017 11:23
Specimen Type: Whole blood
OLIS Site Modifier:
OLIS MRN:
HCN: 3986255713
Specimen Collected By: Cambridge Memorial Hospital Lab 4169
Ordering Provider: ACHTYMICHUK,GERALD 50048 MDL
Collected Date: 13/02/2017 11:23
Last OLIS Update: 27/02/2017 09:17
Collection Volume:
Status: Final
Sex: M
Facility: OLIS (MOHLTC)
Specimen Received Date: 13/02/2017 11:23
Specimen ID:
No. Of Sample Containers:
Order ID: L0170213H2 (Cambridge Memorial Hospital Lab 4169)

OLIS Admitting Provider Name: ACHTYMICHUK,GERALD 50048 MDL
OLIS Attending Provider Name: ACHTYMICHUK,GERALD 50048 MDL
Ordering Provider Address: 20 HOBSON STREET
SUITE 201
CAMBRIDGE ON N1S 2M6 CAN

Name	Result	Units	Delta Result	Normalcy	Normal Range	Status	Performing Site
LEUKOCYTES; BLOOD	11.0	x10\S\9/L		H	4.0-10.0	Final	Cambridge Memorial Hospital (Lab 4169) 700 Coronation Bouleva
ERYTHROCYTES; BLOOD	4.00	x10\S\12/L		L	4.5-5.9	Final	Cambridge Memorial Hospital (Lab 4169) 700 Coronation Bouleva
HEMOGLOBIN; BLOOD	150	g/L			135-175	Final	Cambridge Memorial Hospital (Lab 4169) 700 Coronation Bouleva
HEMATOCRIT; BLOOD	0.45	L/L			0.40-0.54	Final	Cambridge Memorial Hospital (Lab 4169) 700 Coronation Bouleva
MEAN CORPUSCULAR VOLUME; RBC	70.0	fL		L	78-98	Final	Cambridge Memorial Hospital (Lab 4169) 700 Coronation Bouleva
MEAN CORPUSCULAR HEMOGLOBIN; RBC	24.0	pg		L	26.0-33.0	Final	Cambridge Memorial Hospital (Lab 4169) 700 Coronation Bouleva
MEAN CORPUSCULAR HEMOGLOBIN CONCENTRATION; RBC	310	g/L		L	320-360	Final	Cambridge Memorial Hospital (Lab 4169) 700 Coronation Bouleva

Test: COMPLETE BLOOD COUNT (HEMATOLOGY)
Ordered Date: 08/12/2016 12:02
Specimen Type: Whole Blood
OLIS Site Modifier:
OLIS MRN:
HCN: 3986255713
Specimen Collected By: Hamilton Health Sciences - MUMC Site Lab 4137
Ordering Provider: Hamilton Health Sciences-MUMC,Provider Unavailable 4137 MDL
Collected Date: 08/12/2016 12:01
Last OLIS Update: 08/12/2016 12:06
Collection Volume:
Status: Partial
Sex: M
Facility: OLIS (MOHLTC)
Specimen Received Date: 08/12/2016 12:02
Specimen ID:
No. Of Sample Containers:
Order ID: 160812:H00005R (Hamilton Health Sciences - MUMC Site Lab 4137)

OLIS Attending Provider Name: Hamilton Health Sciences-MUMC,Provider Unavailable 4137 MDL
Ordering Provider Address: 293 Wellington Suite 133
Inter-Hospital Truck CAN
Ordering Site: Hamilton Health Sciences - MUMC Site (Lab 4137)
1200 Main Street West
Hamilton, ON L8N 3Z5

Name	Result	Units	Delta Result	Normalcy	Normal Range	Status	Performing Site
LEUKOCYTES; BLOOD	7.7	x10 9/L			4.0-11.0	Final	Hamilton Health Sciences - MUMC Site (Lab 4137) 1200 Main
ERYTHROCYTES; BLOOD	3.68	x10 12/L		L	4.5-6.5	Final	Hamilton Health Sciences - MUMC Site (Lab 4137) 1200 Main
HEMOGLOBIN; BLOOD	109	g/L		L	130-180	Final	Hamilton Health Sciences - MUMC Site (Lab 4137) 1200 Main
HEMATOCRIT; BLOOD	0.349			L	0.400-0.540	Final	Hamilton Health Sciences - MUMC Site (Lab 4137) 1200 Main
MEAN CORPUSCULAR VOLUME; RBC	94.8	fL			82-99	Final	Hamilton Health Sciences - MUMC Site (Lab 4137) 1200 Main

Trending Lab Results

Lab trending and graphing can be performed on results listed in the Component, Expanded, and List views.

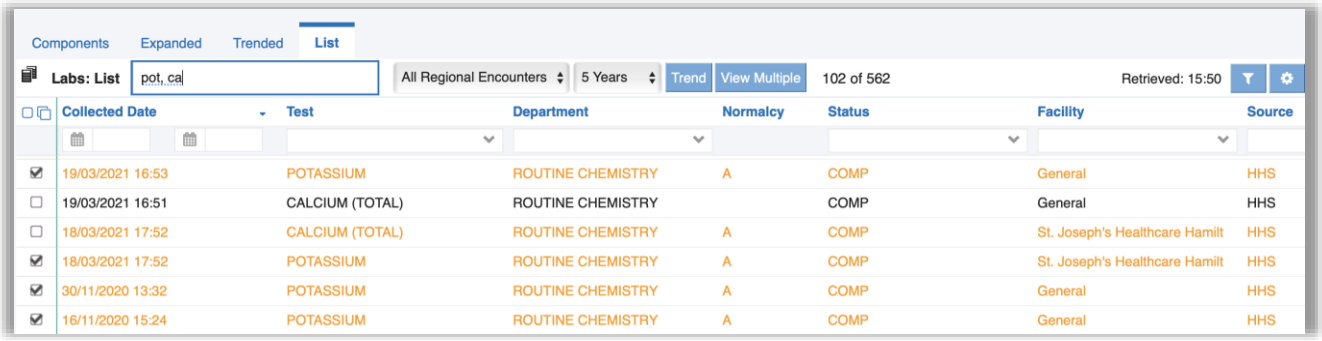
To trend results:

1. Make sure **Select similar** is enabled. When this option is enabled you can click on a single test result and ClinicalConnect will automatically select all results with the same test name.

Select Similar **Enabled** Select Similar **Disabled**

If Select Similar is disabled, click the X once to change it to enabled.

2. Select the test or component you want to trend. In the example below, the Potassium component is selected from the List view.

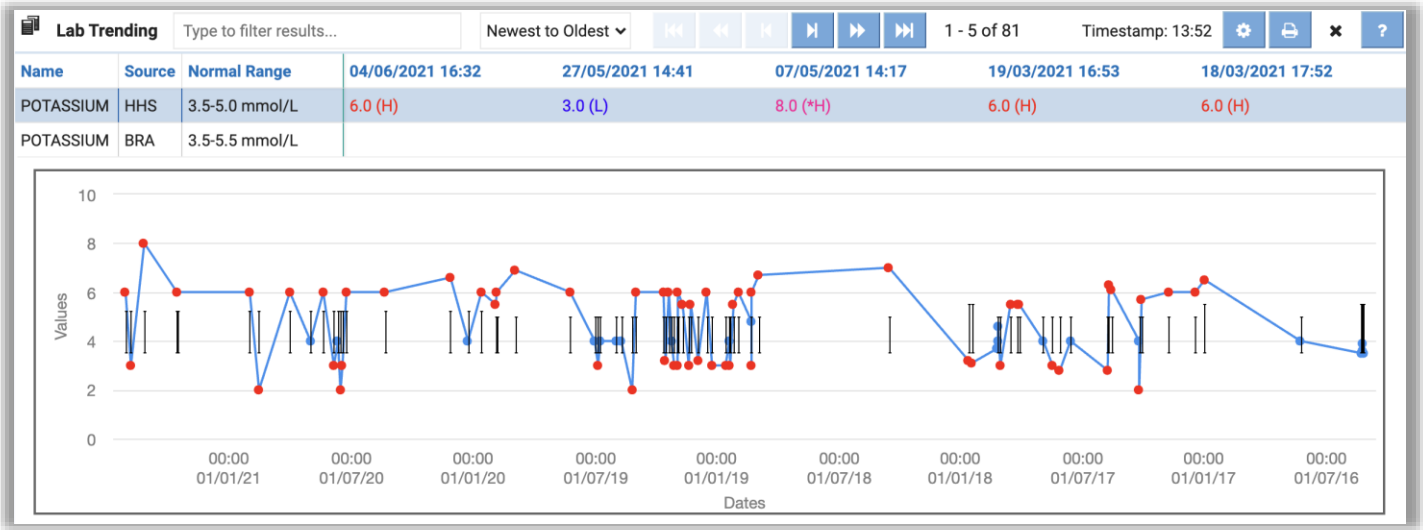


If Select Similar is enabled you would notice that all instances of Potassium are selected.

3. Click the **Trend** button.

All Potassium results are displayed in the Lab Trending portion of the screen.

4. Click the trended component in the Lab Trended view to display the graph view of the trended data. To hide the graph from this view, click the lab test again.



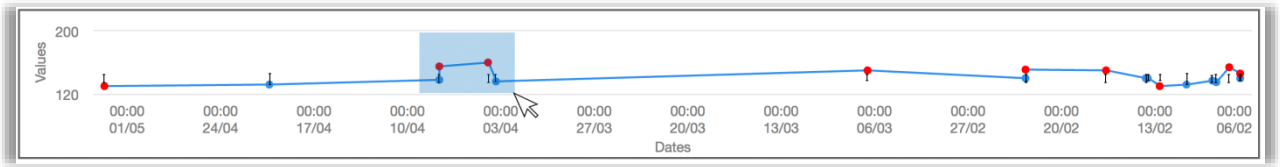
Graph Zoom

Multiple lab values can be difficult to read if they are plotted closely on the graph. The new zoom feature allows you to select a section of a graph and zoom into that section to get a better view of the multiple points of data.

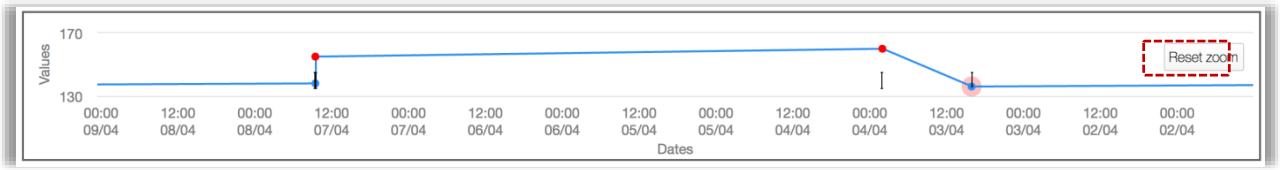
This feature is available in both the Labs module and the Patient Timeline.

To zoom into a graph:

1. Click and drag your cursor over the portion of the graph you want to zoom in on.



2. Release your mouse button to zoom in. Click the **Reset zoom** button to reset the graph to its original size.



Setting Your Default Labs View

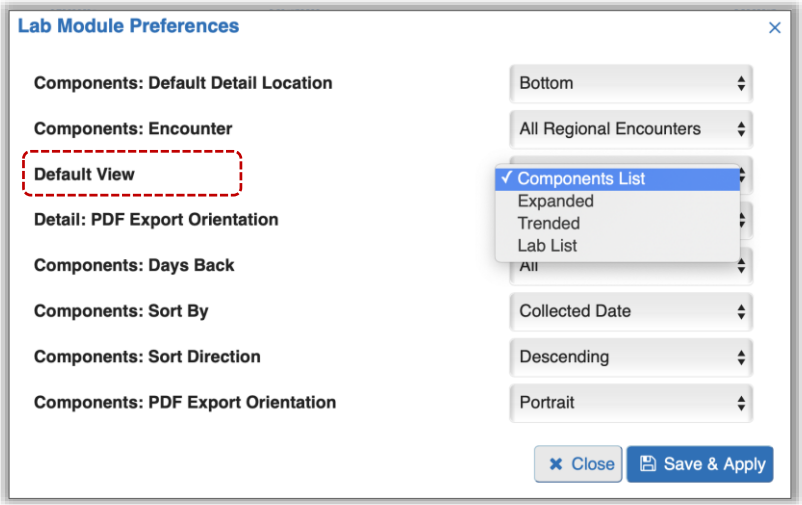
Show Me

You can select which Lab view you want displayed by default when you first access the Labs module. The easiest way to customize your default Lab view is from the Lab module Preference icon.

To set your default view:

1. Click on the **Preference** icon from any Lab module. The Preferences window will display the Default View option.
2. Click the **Default View** dropdown list to select the Labs tab you want to display when you first access the Labs module.
3. Click **'Save & Apply'** to save your preferences.

   This will ensure that the next time you access the Lab module, your selected Lab view will display automatically.



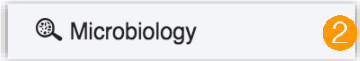
Microbiology Module

Show Me

Ask a Question

The Microbiology Module displays a list of the patient's microbiology tests and isolated organisms from contributing source systems including results from Ontario Laboratories Information System (OLIS).

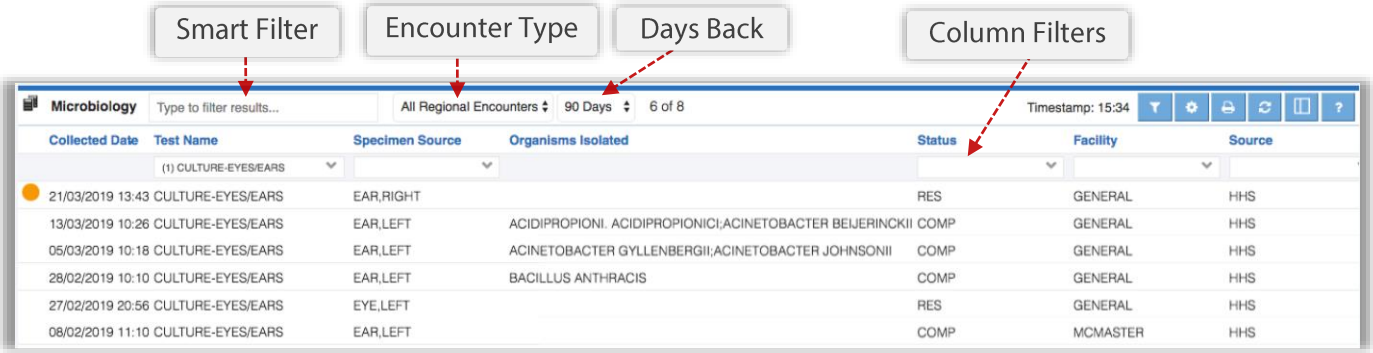
New Results



The Microbiology module displays a New Result indicator if New Results are available for the selected encounter. (Refer to the New Results Module for more information on new results indicators)

OLIS data is not available in the New Results module and will not generate new results flags.

To access the Microbiology module, select **Microbiology** from the Clinical Modules menu.



To view OLIS data make sure your Encounter preference is set to All Regional Encounters.

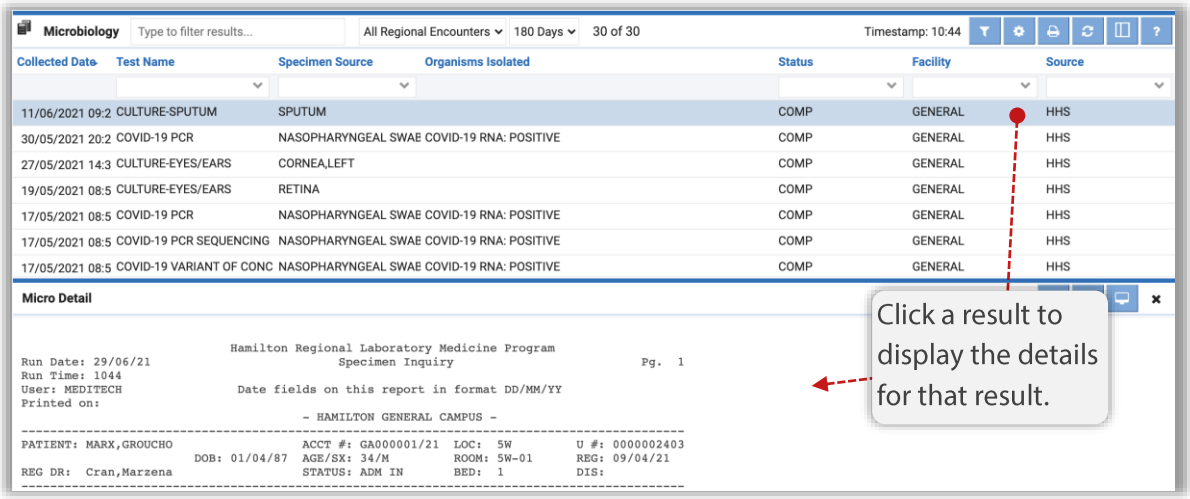
OLIS Limitations

There are limitations for accessing OLIS data from within ClinicalConnect. These limitations include:

- An organization must have signed up for the appropriate Ontario Health access otherwise, you will not be able to access OLIS data and OLIS data will not be listed in the modules. If the access permissions are not in place you will see the message **"OLIS matches filtered."**
- A patient's record may have a consent directive limiting some or all of their OLIS data from displaying in ClinicalConnect. This will generate the message **"Some or all of the requested OLIS laboratory information was not returned due to a patient consent directive."** OLIS restricted records cannot be overridden in ClinicalConnect.

Viewing Microbiology Test Result Details

Microbiology results are displayed in a sortable list. Click the row of the result you want to view to see even more details about the results.



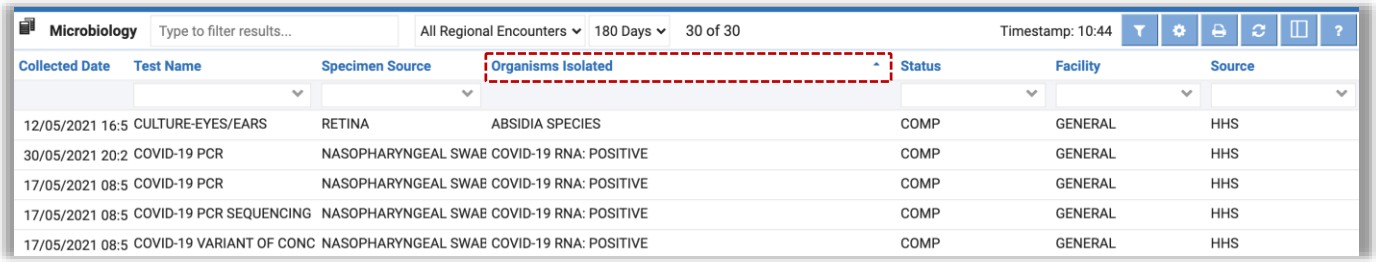
Depending on your preference settings, the Microbiology Details will either show up to the right of the results list or below the results list.

To customize where details are viewed on the screen, see the Navigation Layout section of this guide.

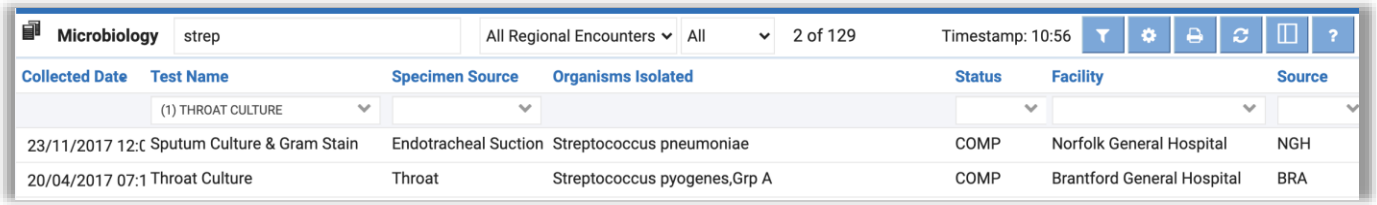
Sorting Results based on Organisms Isolated

Microbiology results contain a column for Organisms Isolated. To filter through your results based on Organisms Isolated:

1. Click the **Organisms Isolated** column header to sort the entire list alphabetically by organisms isolated.

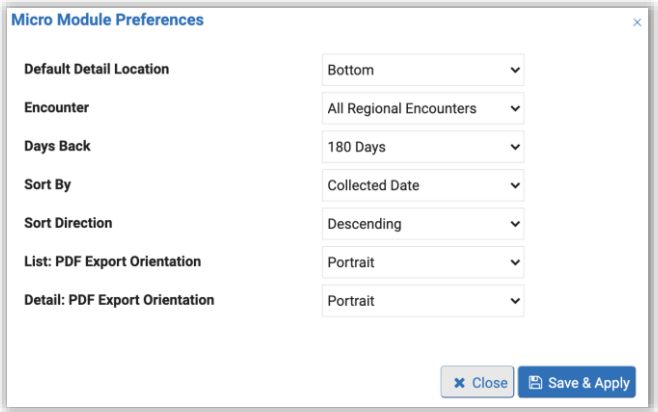


2. Scroll through the sorted list to locate the results you want to view.
3. Use the Smart Filter if you want to locate a specific organism isolated.
   Example: Type **strep** in the Smart Filter search box to locate Streptococcus results.



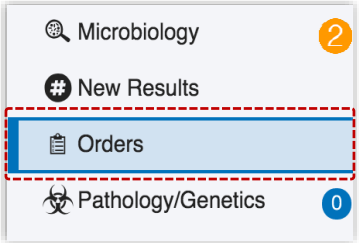
Microbiology Preferences

The Microbiology module has its own set of preferences that can be accessed and configured by clicking the Preferences button in the view header or by using the Preference Setup Wizard.



After updating your preference settings, click the **Save & Apply** button to save your changes. To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

Orders Module



The Orders module displays a list of patient orders (if available) from the source systems. This module retrieves data from the selected visit only to a maximum of 30 days back.

To access the Orders Module, click the **Orders** option located in the Clinical Modules menu.

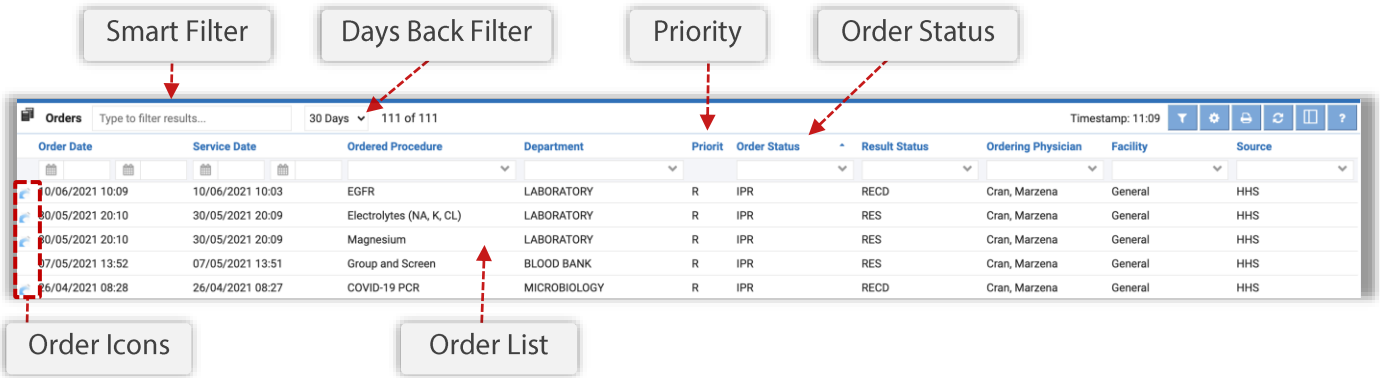
This module can be used to gain insight into the types of orders that have been entered for the patient during the selected encounter, including the order status, priority and result status. This information can be helpful if you need to determine if the patient already has an order for a test or procedure and the status of that order. It's important to note that there may be orders entered and resulted for the patient from other visits and from beyond the 30 days back and will not display in the Orders module in your current view. Be sure to check the associated modules (Labs, Microbiology, and Radiology for example) to view available module-specific results.

For more information about the Priority, Orders Status and Results columns, refer to the description table.

The Order Result icon and Order Details may not be available for all facilities. The Orders module is not applicable and will not display when viewing Home and Community Care (HCC) patient encounters.

Order Results Icon

The Order Result icon displays in the first column of the list view as shown in the image below indicates that the order results are available to view in the details. If an order does not have the Order Result icon, this indicates that there are no results available for this order. In this case, the status of the order may show **IPR** meaning the order is **In Progress** as in the example below. If the order is not resulted, clicking anywhere on the line item will only display the order details in the Detail view.



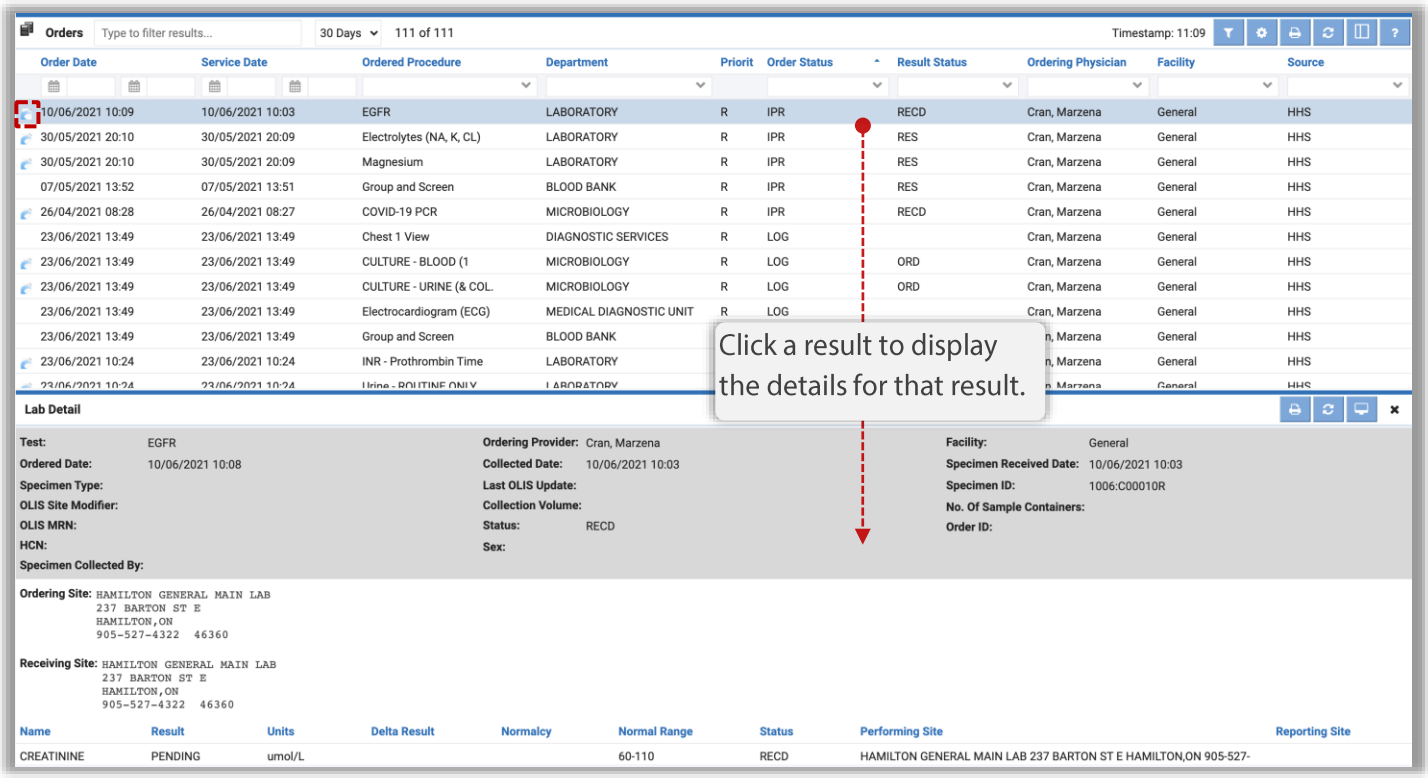
To view orders from another visit, select a different encounter by clicking on the timeline or select a different encounter form the visits module, then go to the Orders module to see the list of orders associated with the new encounter you selected.

Feature	Summary
Priority	The priority column indicates if the order was entered as: • S – Stat • U – Urgent • R – Routine
Order Status and Result Status	Order status types can vary depending on the contributing source system. Select the order line item to view the details. Common types include: • **ORD –** Ordered • **TRN –** Transmitted • **IPR –** In Progress • **COM –** Completed • **RES -** Resulted (this status type will include the order results icon in the first column) • **CNC –** Cancelled

Viewing Order Results

To view the order results:

1. Click the icon next to the order you want to view.
   Order results appear in a Detail window below the list of orders.

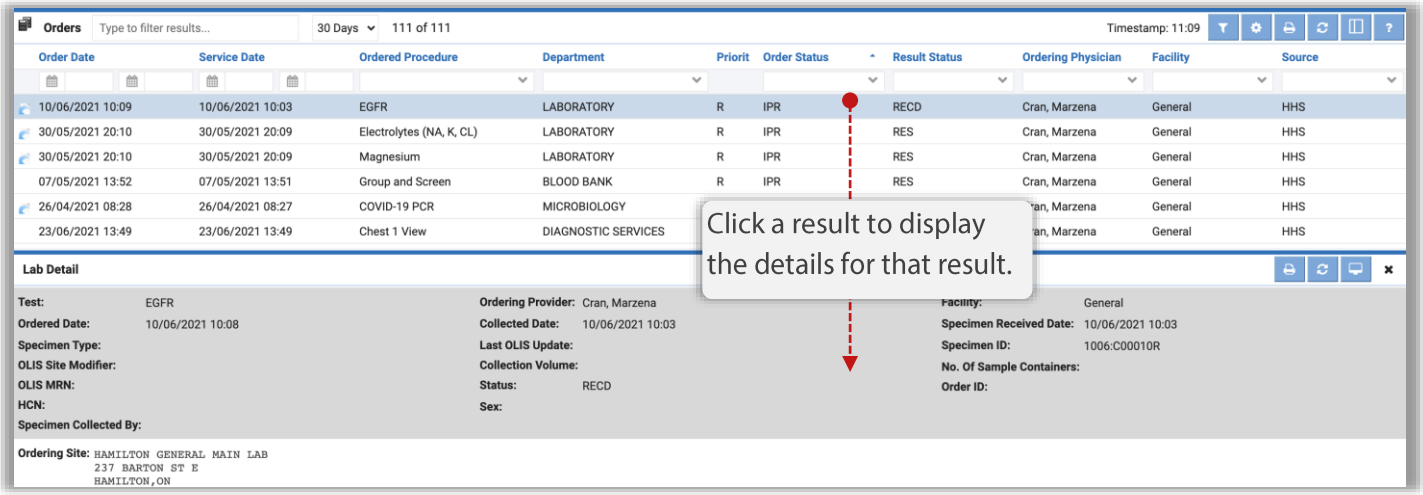


2. Click the Close button to close the result Details.
3. Click the Orders module option from the Clinical Modules menu to return to the Orders list.

Module-specific results are also available in the associated source module and can be accessed beyond the 30-day window limited to the Orders module.

Viewing Order Details

To view order details, click on the line item of the order you want to view (as shown below).



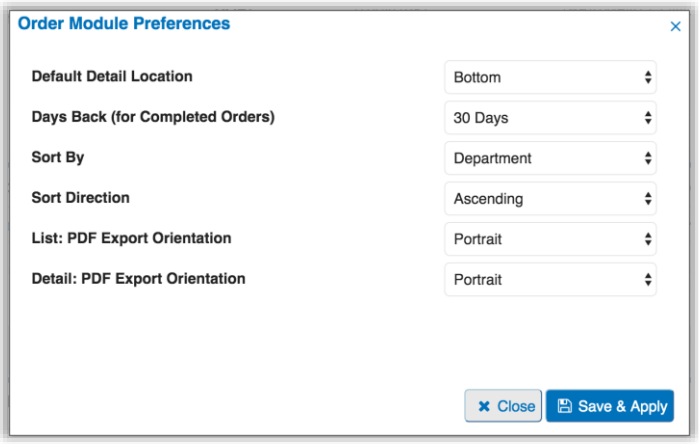
This displays the order workflow details of the selected item indicating that the order was received by the designated department at the facility.

Depending on your preference settings, Order Detail window will display to the right of the orders list or below the orders list.

Click the **Close** button to close the Order Detail screen and return to the Order list view.

Orders Module Preferences

The Orders module has its own set of preferences that can be accessed and configured by clicking the Preferences button in the view header or by using the Preference Setup Wizard.



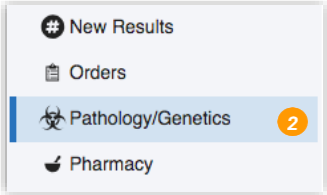
After updating your preference settings, click the **Save & Apply** button to save your changes. To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

Pathology and Genetics

Show Me

Ask a Question

The Pathology and Genetics module displays results and details of a patient's pathology reports. OLIS data is also integrated into the Pathology and Genetics module. OLIS data comes from a Community Labs, Public Health Labs and several acute care hospitals that are contributing data into OLIS.



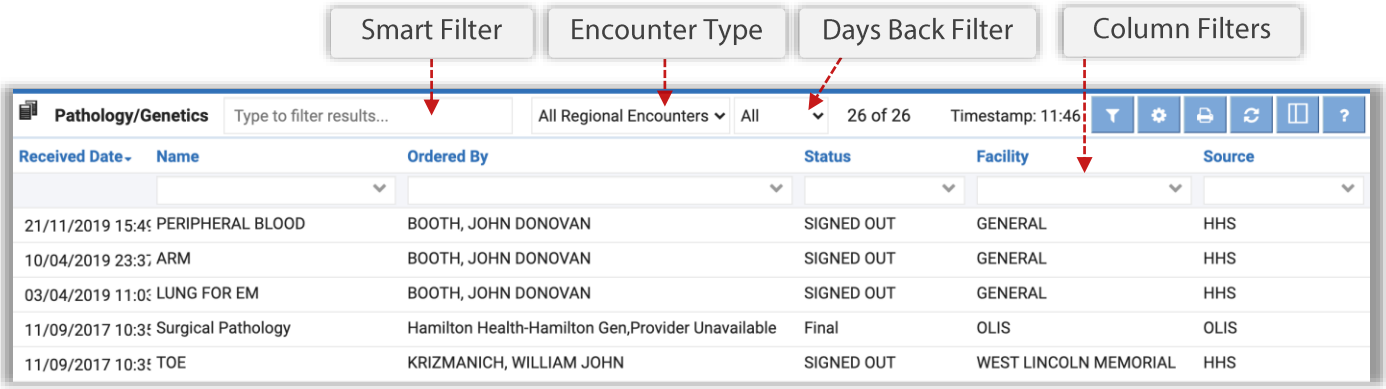
To see a complete list of the contributors, visit the following link: https://ehealthontario.on.ca/en/health-care-professionals/lab-results

OLIS data is not available in the New Results module and will not generate new results flags. See the New Results section to learn more about how new results are flagged.

If new results are available, the module will be flagged with an orange or red indicator with a number showing how many new results are available.

New Results functionality is not available for Pathology reports from Hamilton Health Sciences and St Joseph's Healthcare Hamilton in the Pathology & Genetics module. in this case, users will not receive new result notifications if subscribed to the associated MRN.

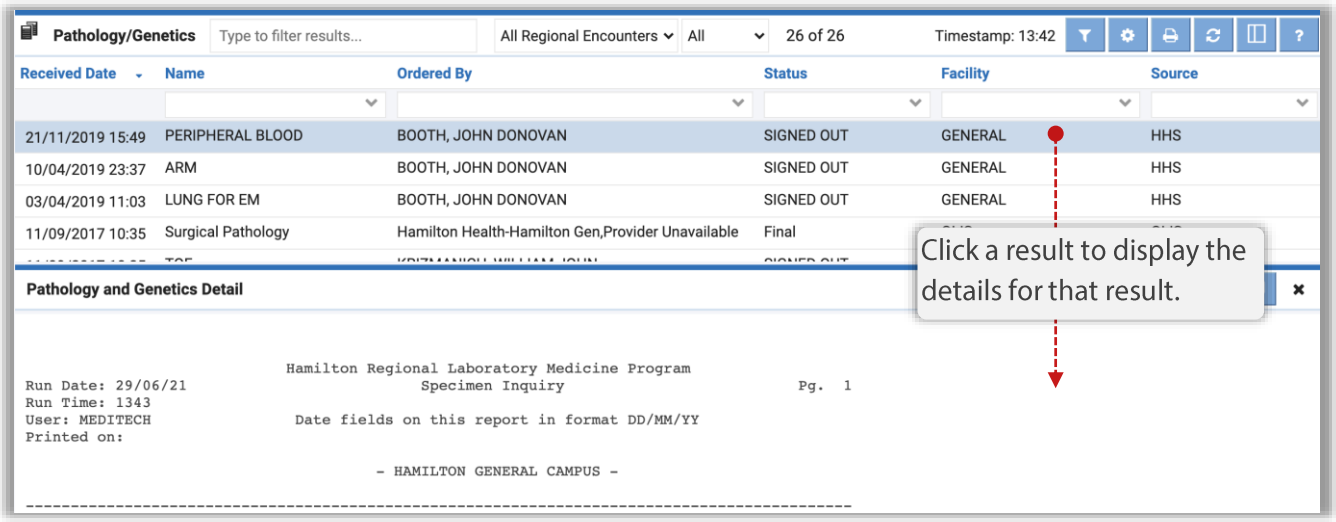
To access the Pathology module, click the **Pathology** option in the Clinical Modules menu.



Viewing Pathology and Genetics Details

Pathology and Genetics results are displayed in a sortable list in the Results List View.

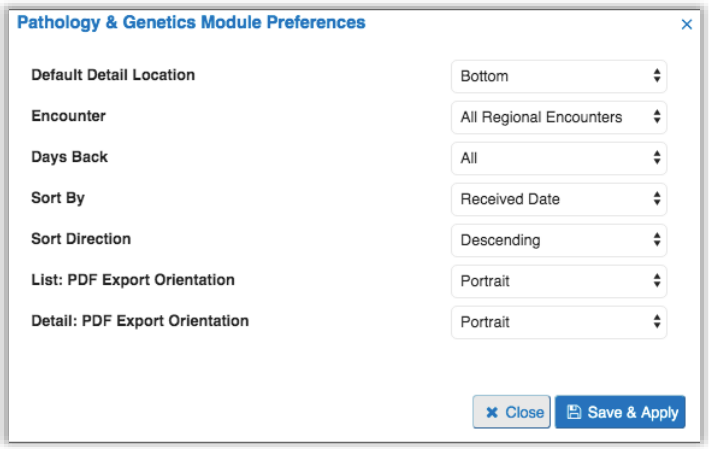
Click the row of the result you want to view to see even more details about that result.



Depending on your preference settings, the Pathology and Genetics Detail window will either show up to the right of the results list or below the results list. Click the Close button to return to the results list view.

Preferences

The Pathology and Genetics module has its own set of preferences that can be accessed and configured by clicking the Preferences button in the module header or by using the Preference Setup Wizard.



After updating your preference settings, click the **Save & Apply** button to save your changes.

To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

Viewing Ontario Laboratories Information System (OLIS) Data

OLIS Limitations

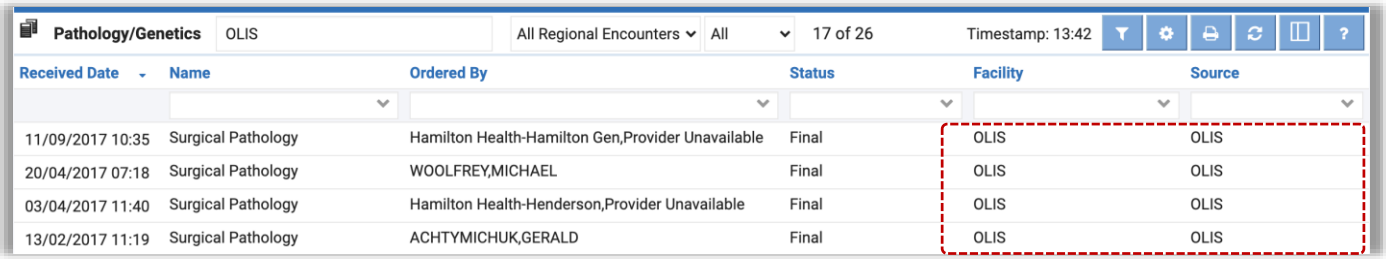
There are limitations for accessing OLIS data from within ClinicalConnect. These limitations include:

- An organization must have signed up for the appropriate Ontario Health access otherwise, you will not be able to access OLIS data and OLIS data will not be listed in the modules. If the access permissions are not in place you will see the message **"OLIS matches filtered."**
- A patient's record may have a consent directive limiting some or all of their OLIS data from displaying in ClinicalConnect. This will generate the message **"Some or all of the requested OLIS laboratory information was not returned due to a patient consent directive."** OLIS restricted records cannot be overridden in ClinicalConnect.

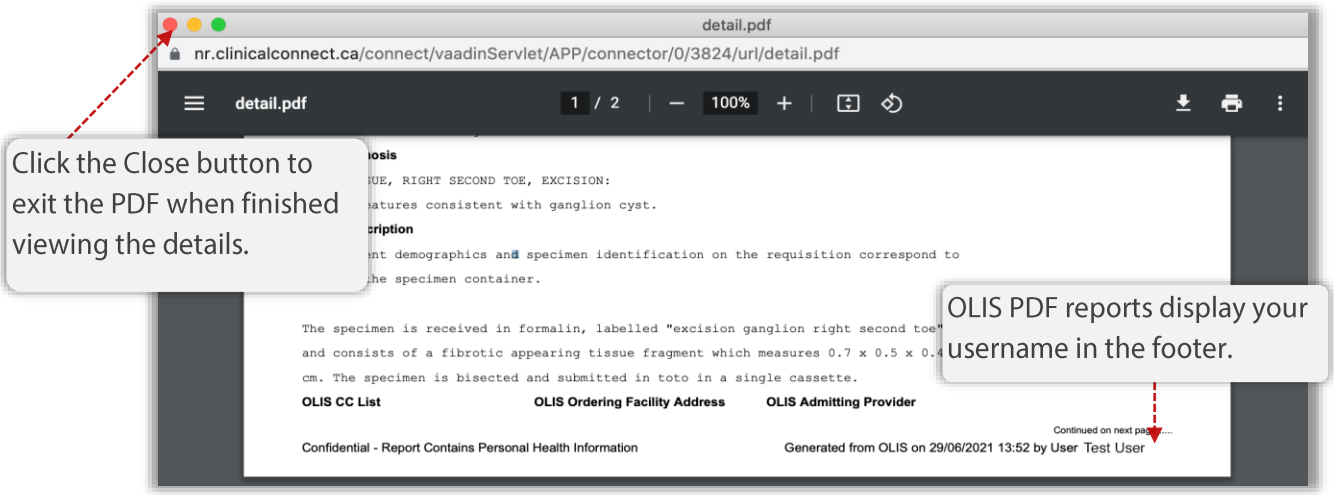
To view OLIS data in the Pathology and Genetics module:

1. Make sure the encounter filter is set to **All Regional Encounters**.

You can enter **OLIS** in the Smart Filter or select OLIS from the Facility or Source column filters. This will filter the list to just display information from OLIS.



2. Click the row of the OLIS results you want to view. The OLIS report will open in PDF format and will display your username in the footer.



OLIS Encapsulated Data

OLIS Encapsulated Data may be an image, fax, or PDF with information related to the test from other facilities. If additional encapsulated data is available, it will be noted in the report in the Supplement Reports section as **See Attachment Supplement Reports. PDF below for Content/Information**.

Example: See Attachment Reports. PDF below for Content/Information message in the Supplemental Reports section of the report.

Patient **CV-HHS-Turquoise, Lily Bibiana** Heath Card Number **2000048492**
Ministry of Health and Long-Term Care
Printed from Ontario Laboratories Information System (OLIS) **Page 2 of 2**

Additional testing to be performed and resulted in an Addendum.

Final Diagnosis

Part A - Breast, biopsy - left: FIBROADENOMA

Part B - Breast, biopsy - right: FIBROCYSTIC DISEASE

Part C - Lymph node, biopsy: NEGATIVE FOR MALIGNANCY

Pathologist

Khalifa, Mahmoud

Supplement Reports

See Attachment Supplement Reports.PDF below for Content / Information

Scrolling to the next page displays the encapsulated data:

SUNNYBROOK HEALTH SCIENCES CENTRE
University of Toronto
2075 Bayview Avenue, Toronto, Ontario M4N 3M5
(416) 480-6100 ext. 4600 fax (416) 480-4271

SURGICAL PATHOLOGY REPORT

Patient:	CV-HHS-Turquoise, Lily Bibiana	Accession #:	S13-99000
HFN:			
Account #:	39612R	Location:	WAMC
TSECC #:			
OHIN #:	2000048492	Date of Procedure:	2013-09-24
DOB/SEX:	1970-12-10 (Age: 42)/F	Date of Receipt:	2013-09-24
Patient Address:	219 VANHORNE DRIVE TORONTO, Ontario M1P1R6 Canada	Date of Report:	2013-09-26 10:57
Physician:	DONALD THOR BLAKE		
Copies to:			

CLINICAL INFORMATION
Numerous lumps in both breasts.

SPECIMENS SUBMITTED
A: Breast, biopsy - left
B: Breast, biopsy - right
C: Lymph node, biopsy

DIAGNOSIS
Part A - Breast, biopsy - left: FIBROADENOMA
Part B - Breast, biopsy - right: FIBROCYSTIC DISEASE
Part C - Lymph node, biopsy: NEGATIVE FOR MALIGNANCY

COMMENT
Additional testing to be performed and resulted in an Addendum.

MACROSCOPIC DESCRIPTION
The specimen consists of 2 cores of tan and fatty tissue, each with a diameter of 3 cm, ranging from 4 to 5 in length. Submitted in toto in A.

Mahmoud Khalifa MD, FRCPC
Report Electronically Signed
2013-09-26 10:57

Physician Copy Page 1 of 1

Pharmacy: Hospital Medications View

Show Me

Ask a Question

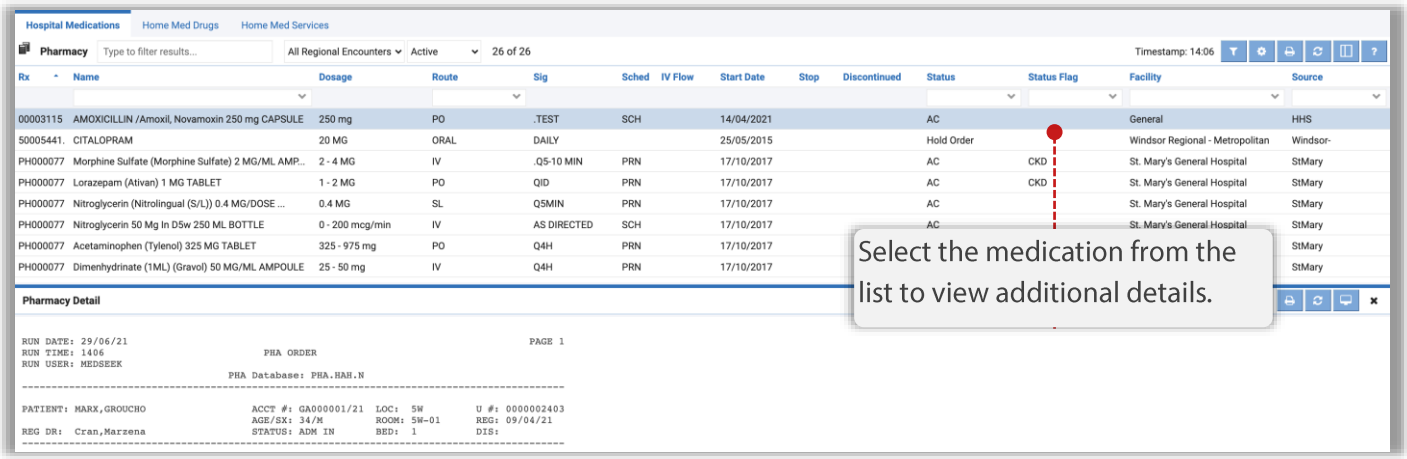
The Pharmacy module contains the **Hospital Medications** tab which displays a list of in-patient hospital medication orders from source hospitals contributing to ClinicalConnect.

Refer to the Integration Status chart to view which facilities are contributing pharmacy data: https://info.clinicalconnect.ca/CC/healthcare/data-integrations

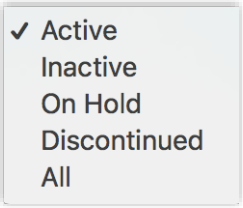
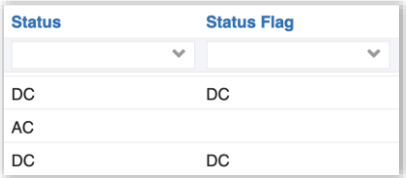
Only in-patient hospital pharmacy orders for the selected visits/encounters are listed in the Hospital Medications module of ClinicalConnect, and may not represent a complete and accurate list of patients' medications. Always review medication order details including the start and stop dates thoroughly when using this module. Any of these medications may have been discontinued or on hold at discharge. Click the medication line item to view associated details if using data for prescribing purposes. The Hospital Medications module in ClinicalConnect is currently not meant to act as an all-encompassing medication reconciliation tool.

To access the hospital medication information:

1. Click the **Pharmacy** module from the Clinical Modules menu.
2. Click the **Hospital Medications** tab.

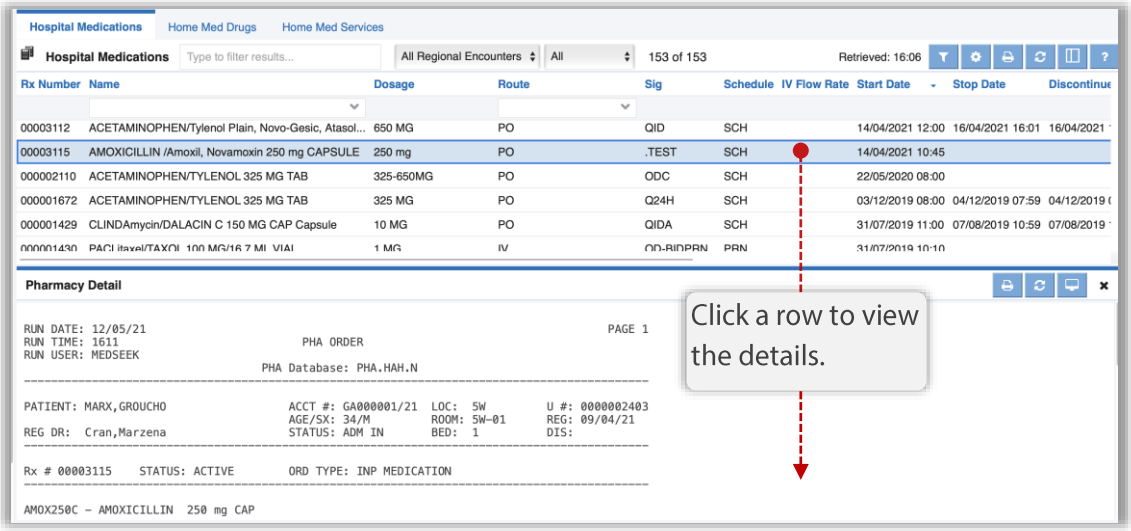


The following table provides a summary of some of the key features of the Pharmacy module.

Feature	Summary
Status Filter	The Status column can be used to filter medications based on the following status types: • **All** – Displays all medications • **Active** – Displays only Active medications for inpatient admissions • **Inactive** – Displays inactive medications. • **On Hold** - Displays medications that are on hold. • **Discontinued** – Displays medications that have been discontinued. 
Status and Status flag columns	Lists the **Status** and **Status Flag** 

Viewing Hospital Medication Details

Medications are displayed in a sortable list. Click the row of the result you want to view to see even more details about the medication that was used.



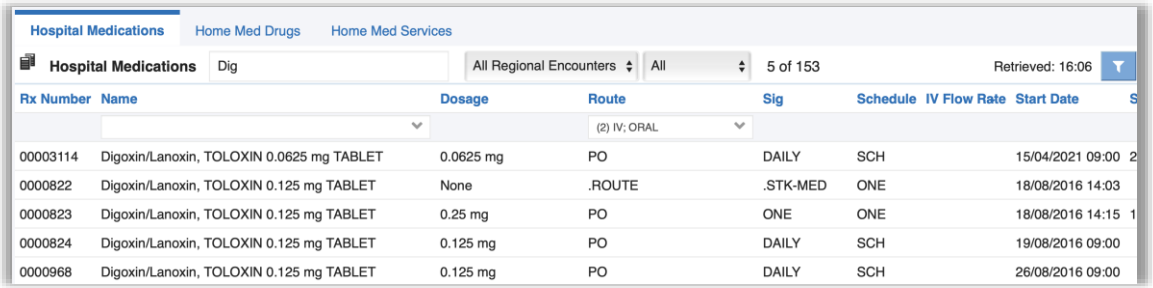
Depending on your preference settings, the Hospital Medications Detail window will either display to the right of the results list or below the results list. To customize where details are viewed on the screen, see the Navigation Layout section of this guide.

Filtering Medication by Name using the Smart Filter

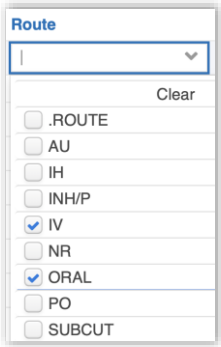
The **Smart Filter** can be used to filter medications by name or any other criteria found in the medication list view columns. The Smart filter can be used to filter medications by name or any other criteria found in the medication list view columns. To filter by a specific medication name, type the medication name (or the first few letters) in the Smart Filter box.

The list of medications will be filtered to only show rows that include text that matches what you entered in the Smart Filter

> Example: **Dig** is typed in the Smart Filter and the list is filtered to only show rows that include medications that contain those letters.



Filtering Medication using the Column Filters



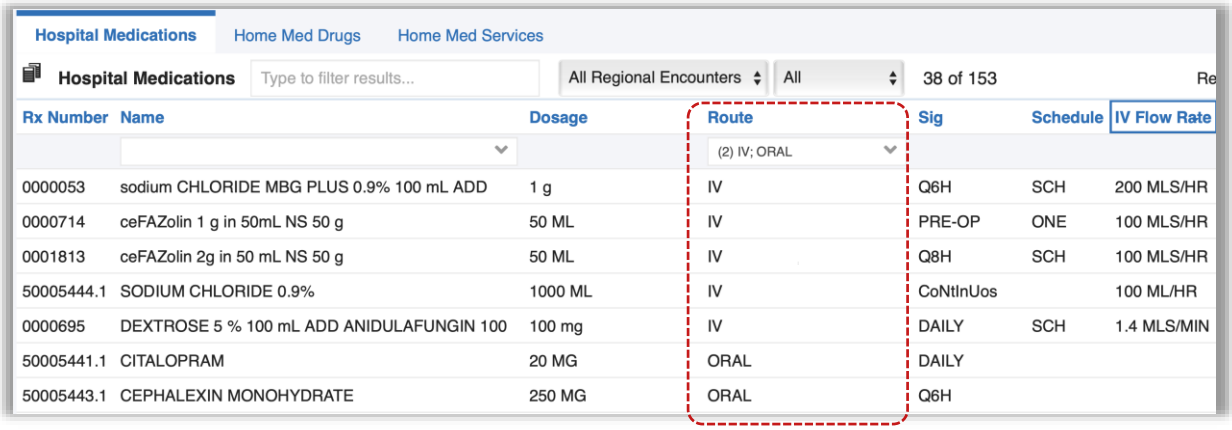
In some clinical case you may want to filter the medication list by using the column filters in the view. Clicking the **Name** column header will sort the list of medications in alphabetical order.

In this example, medications can also be filtered by their route of administration by using the **Route** column filter.

To filter the medication list by the route of administration:

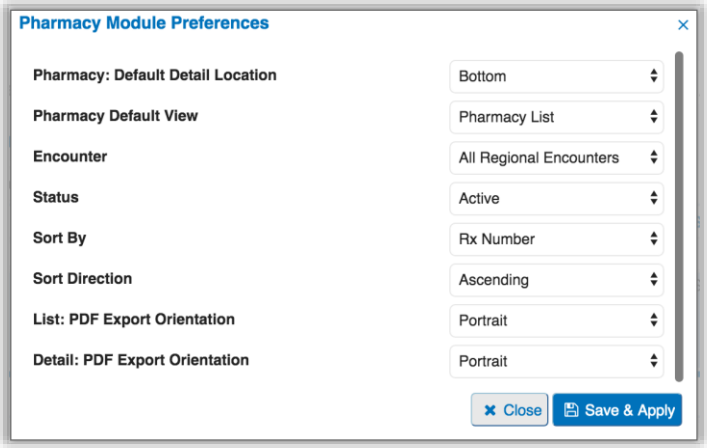
1. Click the dropdown arrow in the **Route column filter** box.
2. Select the routes you want to filter the list by.
3. The list of medications will be filtered to only show routes that match those selected in the column filter. Example below: List of medications filtered by **IV** and **Oral.**

4. To clear the filter, click the Clear option in the dropdown list or click the Clear Filters button in the module header.



Hospital Medications Preferences

The Hospital Medications module has its own set of preferences that can be accessed and configured by clicking the Preferences button in the view header or by using the Preference Setup Wizard.



After updating your preference settings, click the **Save & Apply** button to save your changes.

To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

The following table provides a summary of a specific preference setting that applies to this module.

Preference	Description
Status Filter	This option allows you to configure the default medication status filter: • **All** – Displays all medications. • **Active** – Displays active medications. • **Inactive** – Displays inactive medications. • **On Hold** - Displays medications that are on hold. • **Discontinued** – Displays medications that have been discontinued.

Pharmacy: Home Med Drugs & Services Tabs (Digital Health Drug Repository)

Show Me

Ask a Question

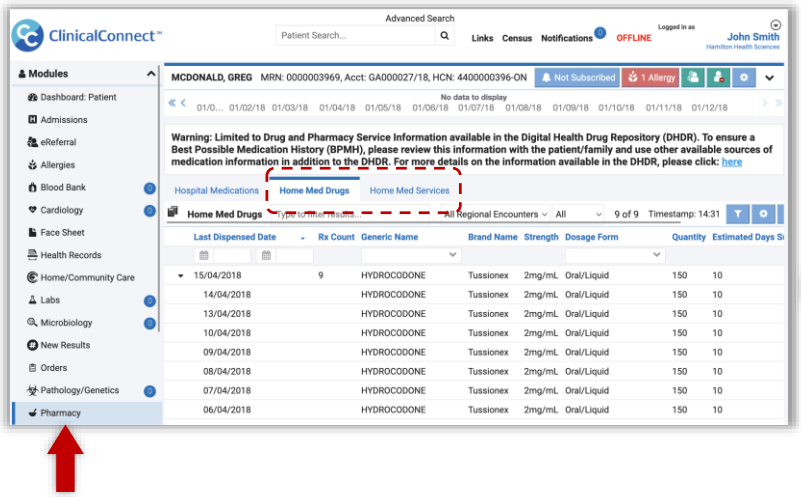
ClinicalConnect is integrated with the **Digital Health Drug Repository (DHDR)**, which is a provincial information source of publicly funded drug and pharmacy services and all monitored drugs (regardless of payor). Before viewing the DHDR information in ClinicalConnect, please review the **Digital Health Drug Repository (DHDR): Guide for Clinical Use** found on Ontario Health's site that provides information for end users to appropriately interpret and use the information provided via the DHDR and meets the Ministry of Health's mandatory training requirements for use of the DHDR. The complementary DHDR Data Reference Guide provides a summary of the DHDR information. More information about the DHDR can be found on the Ontario Health website at; www.ehealthontario.on.ca/en/support/dispensed-medications.

In ClinicalConnect, DHDR information is presented in two tabs within the **Pharmacy module** called **Home Med Drugs** and **Home Med Services**, allowing clinicians to easily access and view the information from any desktop or mobile device as shown below. In addition, users have the ability to print customized DHDR reports which can be used to support 'Best Possible Medication History' practices along with input from the patient or his/her Substitute Decision Maker (SDM).

Note: Provincial repositories such as the DHDR retrieve information based on the patient's Health Card Number (HCN). In cases where the HCN is not available or invalid, data from provincial repositories will not be accessible in ClinicalConnect. In addition, access to DHDR information in ClinicalConnect is limited to users of Participant Organizations that have signed the appropriate Ontario Health access agreement(s).

Desktop View - Pharmacy Module

Home Med Drugs and Home Med Services Tabs



Mobile View

Home Med Drugs and Home Med Services Icons

Pharmacy Module: Home Med Drugs

The Home Med Drugs tab displays information pertaining to a patient's Ontario publicly-funded drugs dispensed by community pharmacies as well as all monitored drugs (regardless of payor), if available from the Digital Health Drug Repository (DHDR).

Please note that for Participant Organizations authorized to view data from the Digital Health Drug Repository (DHDR) using ClinicalConnect, please be advised that as of March 13, 2026, only COVID-19 vaccine administrations performed in community pharmacies will be viewable in ClinicalConnect. This change is due to the decommissioning of the COVAXON solution. Other sources of COVID-19 vaccinations (e.g., those not performed in community pharmacies) will no longer be visible in ClinicalConnect. Questions or concerns about this change can be emailed to OH-DS_servicedesk@ontariohealth.ca.

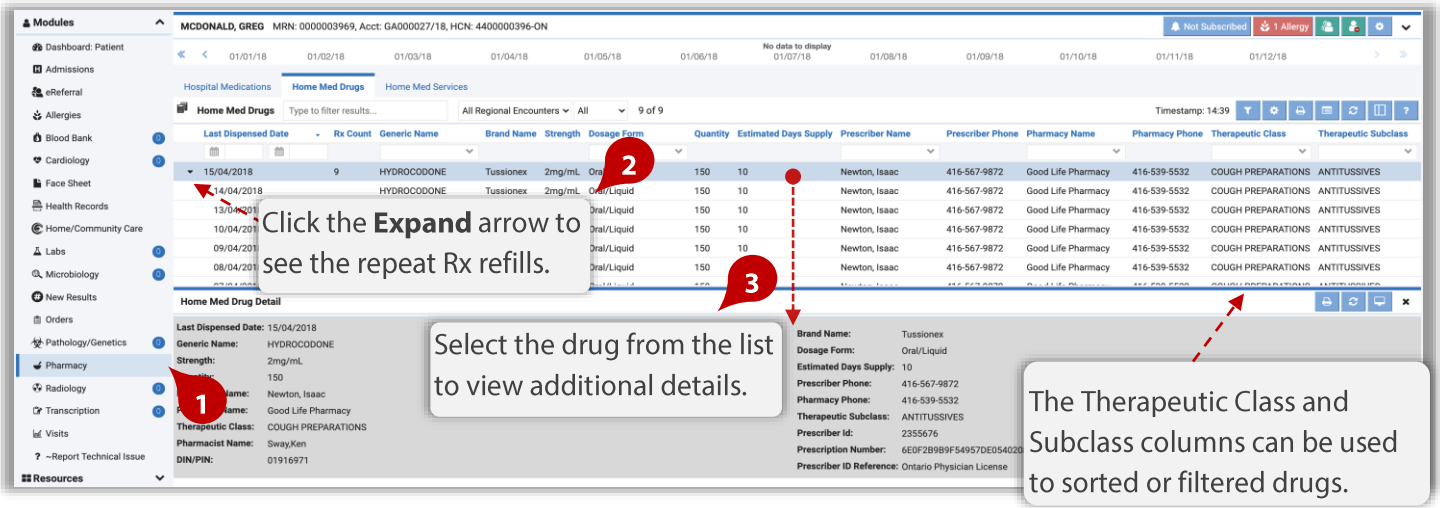
To access Home Med Drugs information in ClinicalConnect:

1. Select the **Pharmacy** module.
2. Select the **Home Med Drugs** tab. The Home Med Drugs tab is the default view for users who are authorized to access DHDR, unless the user has changed their preferences.

To view Home Med Drugs or Services from the DHDR, ensure that the **Encounter** filter is set to **All Regional Encounters**. The **Days Back** default filter is set to 180 days by default but can be modified. If no DHDR data is available for the patient within the selected days back parameter, the following message will display: **No records found for search time period**
In this case, increase the number of Days Back to check for additional data. This filter can be set to a maximum of **ALL**, however this setting may impact data retrieval speed if returning large volumes of pharmacy data.

Meds in 'Rolled Up' Format

- Medications with the same Generic name, Dose/Strength and Dosage Form display in a collapsed "rolled-up" format, showing the most recently dispensed med first and can be expanded to see each repeated medication line item by clicking the **Expand** arrow, as shown below.

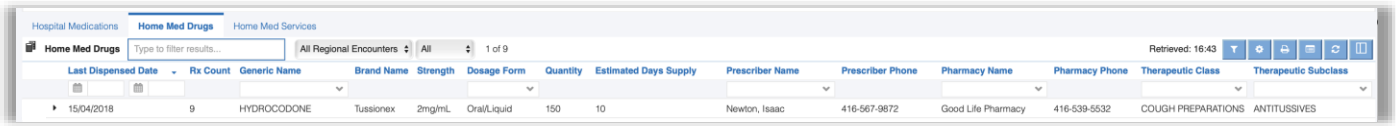


3. Any drug listed in the view can be selected to display additional information. To view the medication details, select it from the list to display the associated details. For more information regarding details provided with Drugs and Services contained in the DHDR, refer to the **Digital Health Drug Repository (DHDR): Guide for Clinical Use** found on Ontario Health's site.

Note: that any Drugs & Services information dated **June 6, 2018** or earlier displays in the Home Med Drugs Tab. Drugs and Services with a dispensed date on or after **June 7, 2018** displays in two separate tabs; **Home Med Drugs**, and **Home Med Services**.

Data Columns in the Home Med Drugs Tab

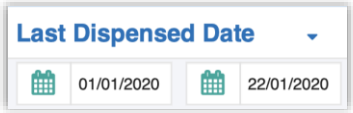
Several columns of data are presented in the Home Med Drugs tab as shown in the image below. Depending on your screen size, you may need to scroll to the right to see all available columns of data.



The table below describes the data columns in more detail. Refer to the **Digital Health Drug Repository (DHDR): Guide for Clinical Use** found on Ontario Health's site for important details and key interpretation notes.

Last Dispensed Date

The date when the pharmacy processed the payment claim for the dispensed medication or pharmacy service. This date does not necessarily reflect the actual date that the recipient picked up the medication or received the pharmacy service, nor that the patient picked up the medication.



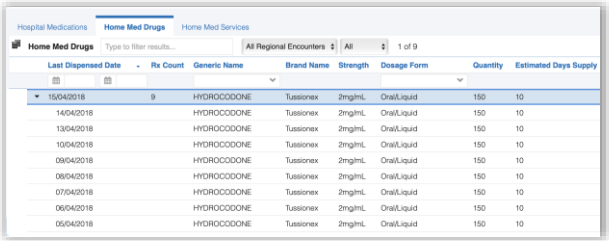
The start and end date range can be defined to narrow down the drug list, within the "Days Back" parameter setting.

Rx Count: the number of prescription refills that have been dispensed. Details of each refill displays when the medication name is clicked to expand.

Strength: strength of the prescription drug dispensed, amount of active ingredient in the drug; for topical and liquid medication it may be shown as a percentage or ratio.

Quantity: quantity of prescription drug dispensed; may be the number of items dispensed, or, for topical and liquid medication (e.g., Methadone) it may refer to dose, total volume or volume of drug concentrate.

Estimated Days Supply: estimated days of treatment based on the directions for use on the prescription, and/or the pharmacist's judgment on usage; estimating usage accurately may not be possible for some prescriptions (e.g., PRN).



Last Dispensed Date	Rx Count	Generic Name	Brand Name	Strength	Dosage Form	Quantity	Estimated Days Supply
15/04/2018	9	HYDROCODONE	Tussionex	2mg/mL	Oral/Liquid	150	10
14/04/2018		HYDROCODONE	Tussionex	2mg/mL	Oral/Liquid	150	10
13/04/2018		HYDROCODONE	Tussionex	2mg/mL	Oral/Liquid	150	10
10/04/2018		HYDROCODONE	Tussionex	2mg/mL	Oral/Liquid	150	10
09/04/2018		HYDROCODONE	Tussionex	2mg/mL	Oral/Liquid	150	10
08/04/2018		HYDROCODONE	Tussionex	2mg/mL	Oral/Liquid	150	10
07/04/2018		HYDROCODONE	Tussionex	2mg/mL	Oral/Liquid	150	10
06/04/2018		HYDROCODONE	Tussionex	2mg/mL	Oral/Liquid	150	10
05/04/2018		HYDROCODONE	Tussionex	2mg/mL	Oral/Liquid	150	10

Prescriber and Pharmacy Phone Numbers

Available if needed to contact the prescriber or the dispensing community pharmacy.

Prescriber Name	Prescriber Phone	Pharmacy Name	Pharmacy Phone
Newton, Isaac	416-567-9872	Good Life Pharmacy	416-539-5532
Newton, Isaac	416-567-9872	Good Life Pharmacy	416-539-5532
Newton, Isaac	416-567-9872	Good Life Pharmacy	416-539-5532

Therapeutic Class and Therapeutic Subclass

The pharmacologic therapeutic classification of the prescription drug dispensed display in the last two columns and can be used to filter or sort drugs by their classification types.

Therapeutic Class	Therapeutic Subclass
(1) ANTI-INFECTIVE AGENTS	
UNCLASSIFIED THERAPEUTIC AGENTS	UNCLASSIFIED THERAPEUTIC AGENTS
CENTRAL NERVOUS SYSTEM DRUGS	PHENOTHIAZINES
CENTRAL NERVOUS SYSTEM DRUGS	C.N.S. STIMULANTS
CENTRAL NERVOUS SYSTEM DRUGS	OPIATE AGONISTS
CENTRAL NERVOUS SYSTEM DRUGS	OPIATE AGONISTS
CENTRAL NERVOUS SYSTEM DRUGS	MISCELLANEOUS CENTRAL NERVOUS SYSTEM DRUGS
UNCLASSIFIED THERAPEUTIC AGENTS	
ANTI-INFECTIVE AGENTS	ANTIVIRALS
CARDIOVASCULAR DRUGS	HYPOTENSIVE DRUGS (FOR DIURETICS SEE 40:28)
CENTRAL NERVOUS SYSTEM DRUGS	SEDATIVES AND HYPNOTICS
HORMONES AND SUBSTITUTES	ANTI-DIABETIC AGENTS ORAL ANTI-DIABETIC AGENTS

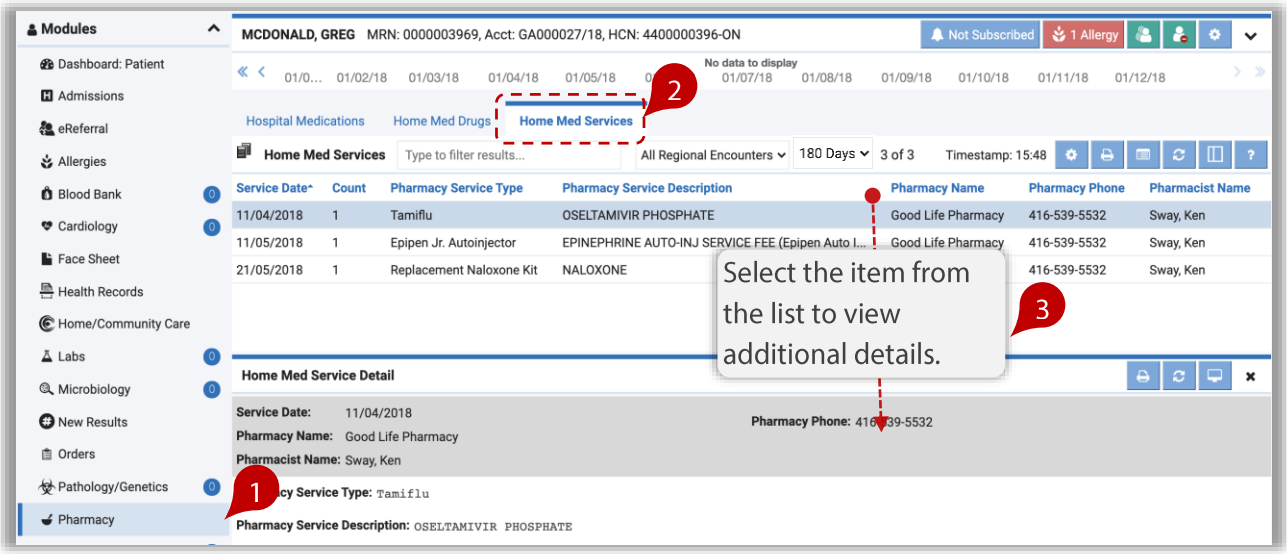
Pharmacy Module: Home Med Services Tab

The **Home Med Services** tab provides a list of pharmacy services provided by a pharmacist in Ontario and paid for by the ministry. A full list of these services is described in detail in the **Digital Health Drug Repository (DHDR): Guide for Clinical Use** found on Ontario Health's site.

To access Home Med Services information in ClinicalConnect:

1. Select the **Pharmacy** module.
2. Select the **Home Med Services** tab.
3. Select the Service from the list to view additional details.

Note: Any Drugs & Services information dated **June 6, 2018** or earlier displays in the Home Med Drugs Tab. Drugs and Services with a dispensed date on or after **June 7, 2018** displays in two separate tabs; **Home Med Drugs**, and **Home Med Services**.

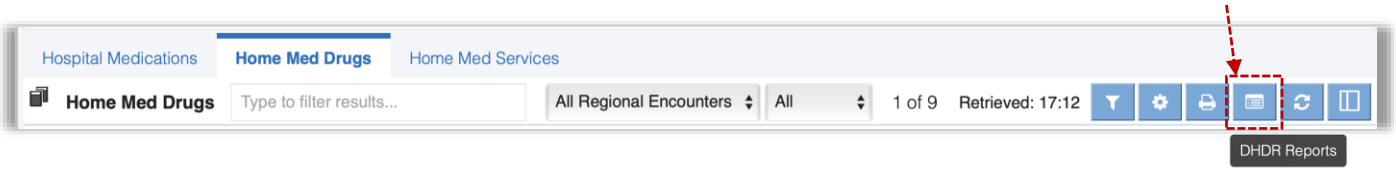


DHDR Custom Reports

Custom **DHDR reports** are available to view or print for data in both the Home Med Drugs and the Home Med Services tabs, by clicking the reports icon in the module banner. There are six report types currently available that display in PDF format and include either a summary or detailed view of the drug & services information available from the DHDR. These reports can be useful for clinicians when completing medication reconciliation activities and support 'Best Possible Medication History' practices.

To generate a report of drugs and/or services, select the **DHDR Reports icon** from the module banner.

Ensure you've selected the appropriate number of **Days Back** you'd like included in the report by using the preferences icon as this will determine the amount of data that displays in the DHDR report. Temporarily changing the number of **Days Back** using the drop-down field in the module header, will not apply the **Days Back** changes to the DHDR reports.



The Print Selection window displays the list of reports available. Select the report type, then click **Print**.

All reports display as PDFs and include patient demographic information, the ClinicalConnect watermark along with page header details, as shown below:

Printed By: TestMarz Cran (testmcran) Printed On: 22/01/2020 17:25

TIP: Clicking the **Print** icon will print the information from every available field in the list or details view, resulting in a printed format that may not be as useful compared to a report where parameters have been set/customized.

Examples of DHDR Custom Reports

There are six different DHDR reports that can be printed as shown in the examples below. When generating a report, consider using the landscape layout which aligns the columns of data without wrapping text over multiple lines. To set your preferences to landscape, click the preferences icon then define the **PDF Export Orientation** to Landscape.

1. Drug Summary Report

This report provides a summary of the Drug list, only showing the most recently-dispensed drug.

Printed By: TestMarz Cran (testmcran) Printed On: 22/01/2020 17:44 Page 1 of 1

DHDR Drug Summary Report

Ministry of Health and Long-Term Care
Digital Health Drug Repository
Drug and Pharmacy Service Information

Patient Name:	MCDONALD, GREG	HCN:	4400000396-ON
Address:	234 STREET HAMILTON,ON L9K 5T6	Gender:	Male
Date of Birth:	15/04/1937	Age:	82

Warning: Limited to drug information available in Digital Health Drug Repository (DHDR). To ensure a Best Possible Medication History (BPMH), please review this information with the patient/family and use other available sources of medication information in addition to the DHDR.

Search Period: All Total Records: 1

Last Dispensed Date	Rx Count	Generic Name Brand Name	Strength	Dosage Form	Quantity	Estimated Days Supply	Prescriber Name Prescriber Phone	Pharmacy Name Pharmacy Phone	Therapeutic Class Therapeutic Subclass
15/04/2018	9	HYDROCODONE Tussionex	2mg/mL	Oral/Liquid	150	10	Newton, Isaac 416-567-9872	Good Life Pharmacy 416-539-5532	COUGH PREPARATIONS ANTITUSSIVES
									1 total

2. Drug Detail Report

This report provides all available details of each dispensed drug, including repeat prescription refills and associated Alert information.

Dispensed Date:	15/04/2018		
Generic Name:	HYDROCODONE	**Brand Name:**	Tussionex
Strength:	2mg/mL	**Dosage Form:**	Oral/Liquid
Quantity:	150	**Estimated Days Supply:**	10
Prescriber Name:	Newton, Isaac	**Prescriber Phone:**	416-567-9872
Pharmacy Name:	Good Life Pharmacy	**Pharmacy Phone:**	416-539-5532
Therapeutic Class:	COUGH PREPARATIONS	**Therapeutic Subclass:**	ANTITUSSIVES
Pharmacist Name:	Sway, Ken	**Prescriber Id:**	2355676
DIN/PIN:	01916971	**Prescription Number:**	999773765
		Prescriber ID Reference:	Ontario Physician License

Reason for Use:

Message Text:

```
Additional Info
----------------------------------------
        Drug Triggering Event: FENTANYL TRANSDERMAL SYSTEM
        Drug Quantity: 325.0
        Conflicting Rx Fill Date: 2017 02 02
        Pharmacy Phone: 416 222 1111
        DIN/PIN: 02018985
```

3. Service Summary Report

This report provides a summary of the Services list. Additional information may be available in the Service Detail Report.

Service Date	Count	Pharmacy Service Type	Pharmacy Service Description	Pharmacy Name	Pharmacy Phone	Pharmacist Name
21/05/2018	1	Replacement Naloxone Kit	NALOXONE	Good Life Pharmacy	416-539-5532	Sway, Ken
11/05/2018	1	Epipen Jr. Autoinjector	EPINEPHRINE AUTO-INJ SERVICE FEE (Epipen Auto Injector)	Good Life Pharmacy	416-539-5532	Sway, Ken
11/04/2018	1	Tamiflu	OSELTAMIVIR PHOSPHATE	Good Life Pharmacy	416-539-5532	Sway, Ken
						3 total

4. Service Detail Report

This report provides all available details related to Home Med Services.

Service Date: 11/04/2018

Pharmacy Name: Good Life Pharmacy **Pharmacy Phone:** 416-539-5532

Pharmacist Name: Sway, Ken

Pharmacy Service Type:
Tamiflu

Pharmacy Service Description:
OSELTAMIVIR PHOSPHATE

5. Combined Drug and Service Summary Report

This report combines both the Home Med Drugs and Services summaries into one report.

6. Combined Drug and Service Detail Report

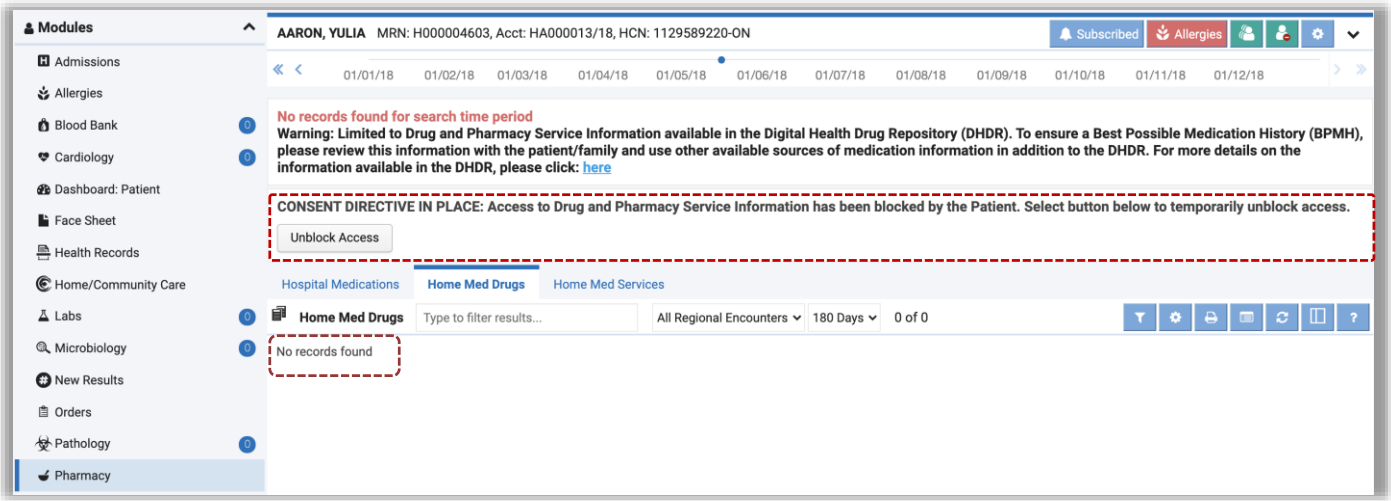
This report combines both the Home Med Drugs and Services details into one report.

Viewing Home Meds or Services with a Consent Directive

All Ontarians have the right to withdraw consent to the sharing of their publicly-funded drugs and pharmacy services, and monitored drug information available through the DHDR. ClinicalConnect honours the consent directive and displays the following message in the patient's ClinicalConnect record:

> **CONSENT DIRECTIVE IN PLACE: Access to Drug and Pharmacy Service Information has been blocked by the Patient. Select button below to temporarily unblock access.**

If a patient has a consent directive applied to their entire record in DHDR, the Home Med Drugs and Home Med Services tabs in ClinicalConnect displays the following message: **No Records Found** as shown below.



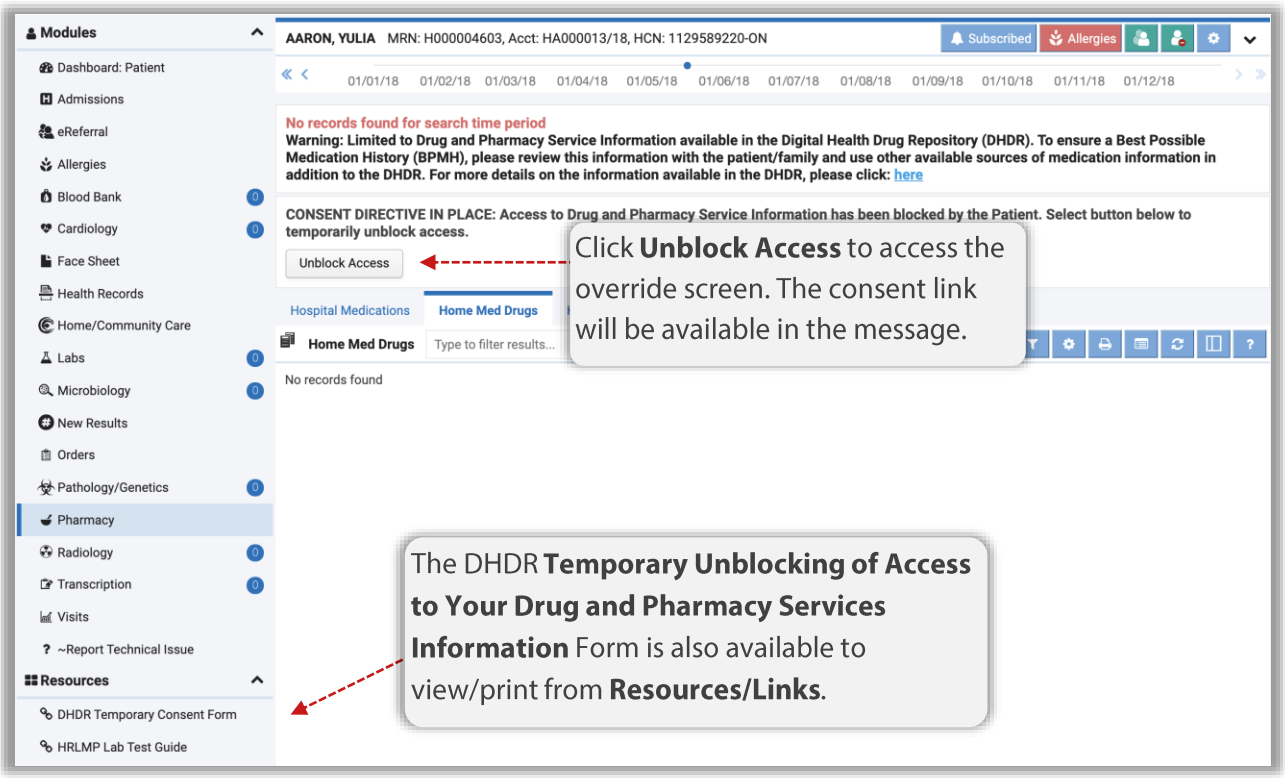
Once the consent reinstatement **(Unblock Access)** is activated by an authorized user, all ClinicalConnect users from the user's organization may access this patient's DHDR drug and services information for a period of four (4) hours.

Process to Temporarily Unblock Access to DHDR Data Using ClinicalConnect

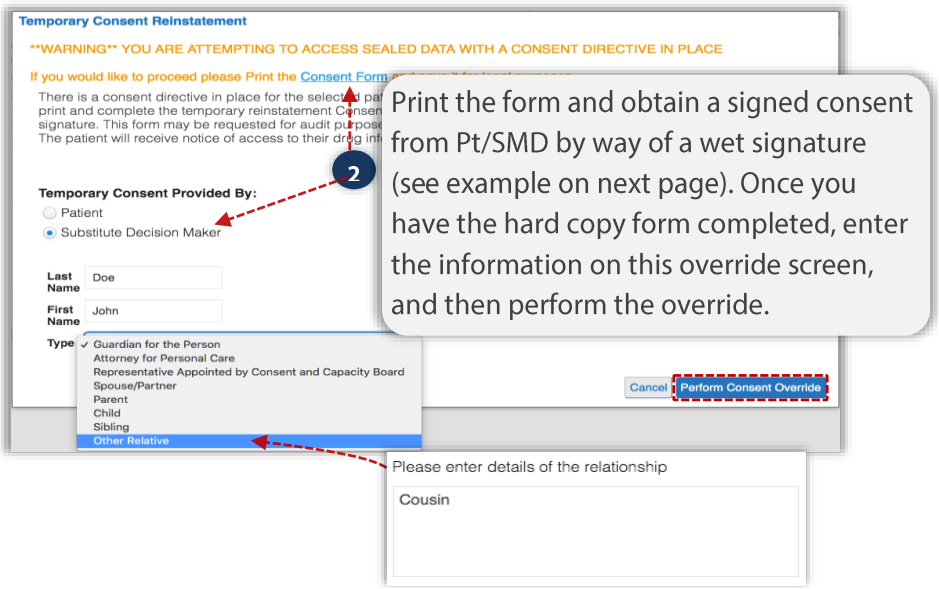
If a patient has a consent directive in place for some or all of their DHDR information, authorized users may temporarily unblock the records, if the patient/SDM provides written consent to do so. The user must document consent to unblock access on the MOHLTC's **Temporary Unblocking of Access to Your Drug and Pharmacy Service Information** form, accessible from within ClinicalConnect.

To perform the consent override:

1. **Complete Consent Form:** First, complete the **Temporary Unblocking of Access to Your Drug and Pharmacy Services** consent form by clicking **Unblock Access** then click the Consent Form link.



Complete the form on-line and then print it to obtain the required wet signature from the patient/SDM before performing the temporary unblocking of access.



2. **Inform the Patient/SDM:** Users must inform the patient/SDM that their consent will provide temporary unblocking of access to the blocked DHDR records to all authorized ClinicalConnect users from within their organization for a period of four hours.

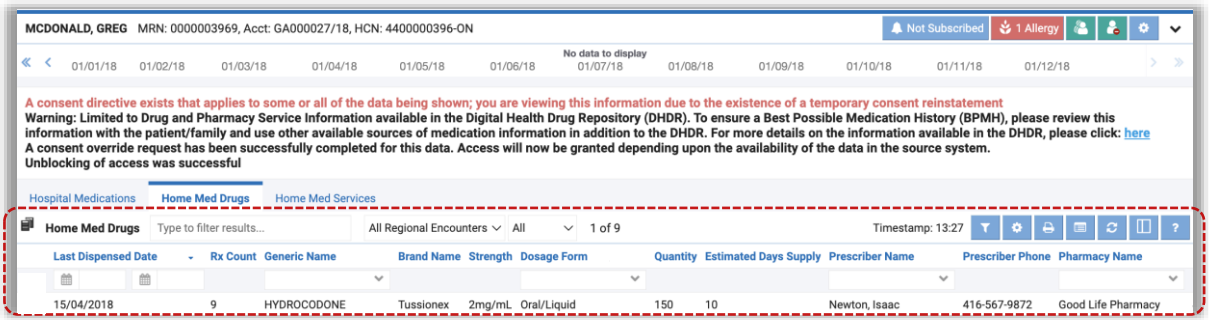
   Note: If the SDM selection is Sibling or Other Relative, you will be required to enter the details of the relationship in the text field provided as shown in this example.

   Audit: The **Temporary Unblocking of Access to Your Drug and Pharmacy Service Information** form **must be retained** in accordance with your organization's privacy policies and procedures, as the Privacy Contact from your organization will need it for audit validation purposes.

3. **Patient Notification:** When consent is temporarily reinstated, the patient will be notified by mail from the MOHLTC.

   After the four-hour period has expired, if a user requires access to the information again, they must follow the same process as described previously and obtain consent from the patient/SDM. Once the override is performed, this message will display:

   A consent override request has been successfully completed for this data. Access will now be granted depending upon the availability of the data in the source system. Unblocking of access was successful.



All authorized ClinicalConnect users from the user's organization will be able to access the patient's blocked information from the DHDR for a period of four hours and will see this message:

> **A consent directive exists that applies to some or all of the data being shown; you are viewing this information due to the temporary unblocking of access.**

Once the four-hour period has expired, if a user requires access to the information again, they must follow the same process as described previously and obtain consent from the patient/SDM.

Completing the Temporary Unblocking of Access to Your Drug and Pharmacy Services Information Form

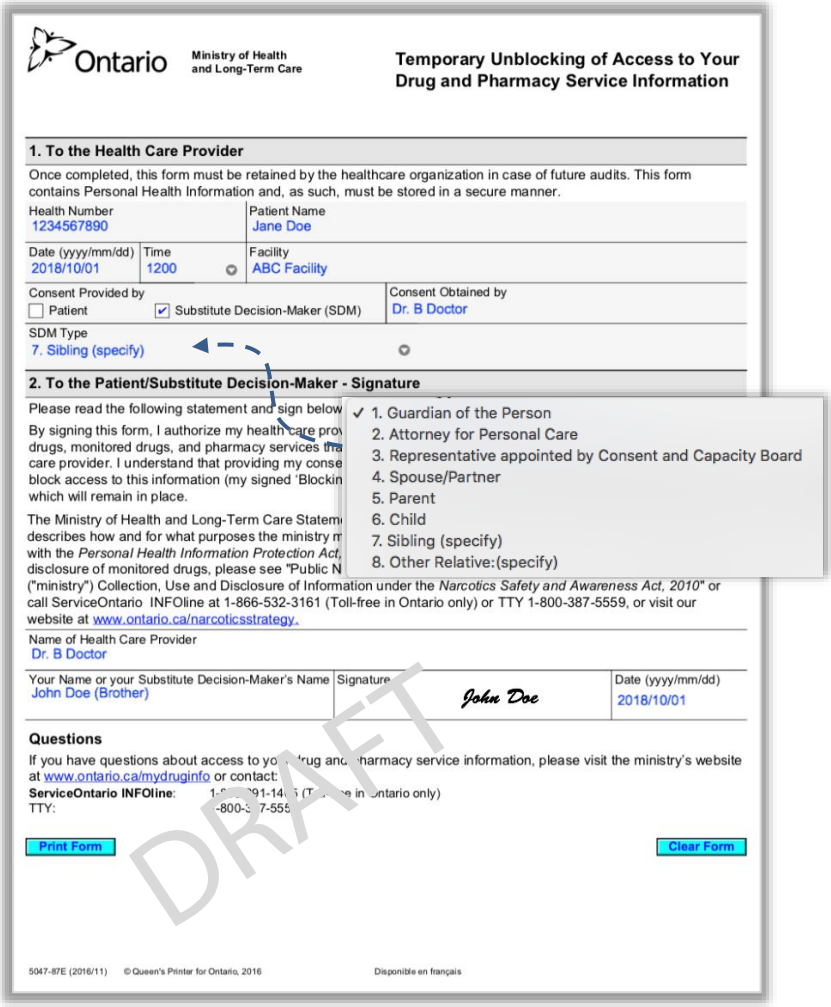
The following explains how to complete the consent form:

IMPORTANT

1. **Consent Form:** Click the consent form link (shown above), complete the form online, print it and have the patient or SDM sign the completed form.

2. **Inform the Patient or SDM:** Users must inform the patient/SDM that their consent to temporarily unblock information will provide access to their blocked DHDR records to all authorized ClinicalConnect users from within their organization for a period of four hours.

3. **Audit:** The completed and signed Temporary Unblocking of Access to Your Drug and Pharmacy Service Information form must be retained in accordance with the organization's privacy policies and procedures, as it will be required by the organization's Privacy Contact for audit verification purposes.


Ontario
Ministry of Health and Long-Term Care
Temporary Unblocking of Access to Your Drug and Pharmacy Service Information

1. To the Health Care Provider

Once completed, this form must be retained by the healthcare organization in case of future audits. This form contains Personal Health Information and, as such, must be stored in a secure manner.

Health Number: 1234567890
Patient Name: Jane Doe
Date (yyyy/mm/dd): 2018/10/01
Time: 1200
Facility: ABC Facility
Consent Provided by: ☐ Patient ☑ Substitute Decision-Maker (SDM)
Consent Obtained by: Dr. B Doctor
SDM Type: 7. Sibling (specify)

2. To the Patient/Substitute Decision-Maker - Signature

✓ 1. Guardian of the Person
2. Attorney for Personal Care
3. Representative appointed by Consent and Capacity Board
4. Spouse/Partner
5. Parent
6. Child
7. Sibling (specify)
8. Other Relative:(specify)

Name of Health Care Provider: Dr. B Doctor
Your Name or your Substitute Decision-Maker's Name: John Doe (Brother)
Signature: John Doe
Date (yyyy/mm/dd): 2018/10/01

Questions

Print Form
Clear Form

DRAFT

4. **Patient Notification:** The patient will receive a notification from the MOHLTC by mail that their consent directive was temporarily unblocked by the patient/SDM as well as the user and organization where the override was performed.

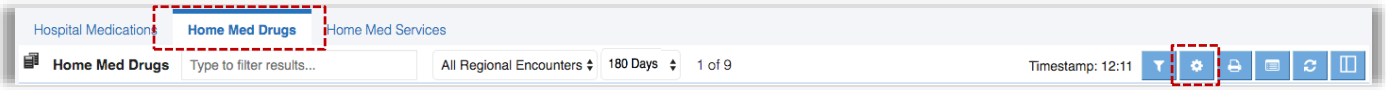
Note: A French language version of this form is available on page 2 of the PDF.

Home Med Drugs Tab: Preference Settings

Setting your preferences to define how you wish to view Home Med Drugs or Services in the Pharmacy Module is essential, as these settings impact how data is organized and how quickly data is retrieved. Data retrieval speeds will also vary depending on a variety of factors such as patient complexity, number of items/results being returned, and filter settings such as Days Back. Preferences need only be set once, and can be updated anytime as your clinical needs change.

The **Home Med Drugs** tab in the Pharmacy module is the default view for all users who are authorized to access DHDR data; if not authorized, the default view will be Hospital Medications.

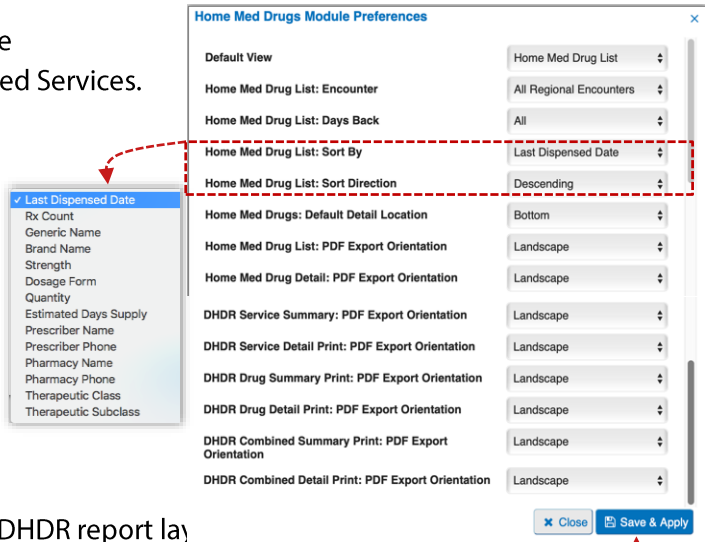
How medication information presents in the Home Med Drugs view can be customized to suit your clinical needs. The easiest and quickest way to customize your preferences is by using the **Preferences** icon . You can customize your preferences as to how you'd like the medication information to display.



The Home Med Drugs tab is the default view this can be changed by selecting Hospital Medications or Home Med Services.

The **Encounter Filter** default must be set to **All Regional Encounters** in order to view Home Med Drugs or Services from the DHDR.

Home Meds Drug List: Sort By: select one of the options from the list to define the sort. In this example, Last Dispensed Date is selected as the default. You can also define the Sort Direction in Ascending or Descending order based on your Sort By selection.



The preferences also include options to customize the DHDR report lay or Landscape orientation).

Click **Save & Apply** to save your preferences.

Home Med Drugs: Default Detail Location: Select **'Bottom'** to display medication details below the list, or **'Right'** to display the details to the right of the list.

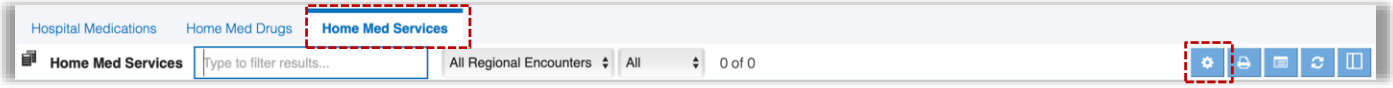
Days Back Filter: The **'Days Back'** filter refers to the amount of information presented based on the number of days back from the date of patient discharge. For an admitted in-patient, the Days Back filter refers to the number of days back from the current date (today).

By default, the **'Days Back'** filter in the Home Med Drug view is set to 180 days but can be changed to a maximum of **'ALL';** however, this setting may impact data retrieval speed if returning large volumes of pharmacy data. If no DHDR data is available for the patient within the selected days back parameter, the following message displays: **No records found for search time period**
In this case, increase the number of Days Back to check for additional data.

Home Med Services Tab: Preference Settings

The **Home Med Services** tab in the Pharmacy module can also be customized based on the column data available in this view.

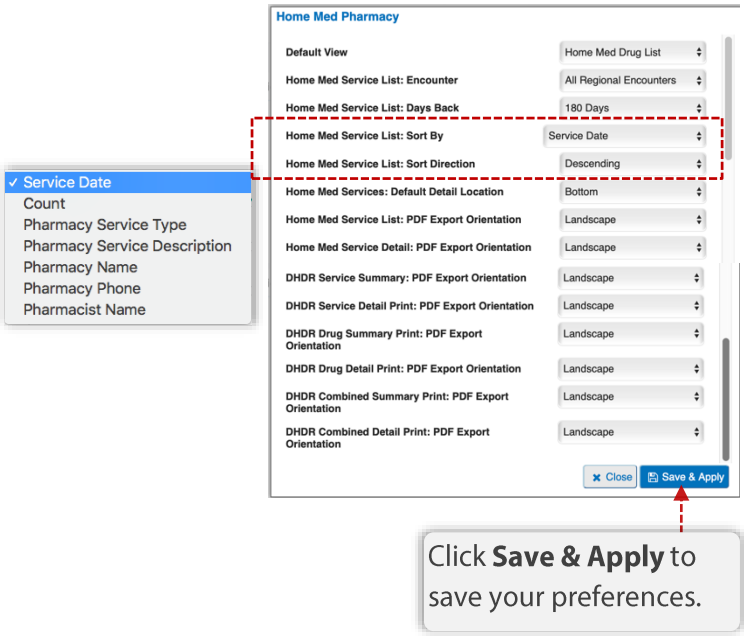
Select the **Preference icon** and using the dropdown menu options, customize your view to suite your clinical needs.



The **Encounter Filter** default must be set to **All Regional Encounters** in order to view Home Med Drugs or Services from the DHDR.

Home Meds Services List

Sort By: select one of the options from the list to define the sort. In this example, Service Date is selected as the default. You can also define the Sort Direction in Ascending or Descending order based on your Sort By selection.

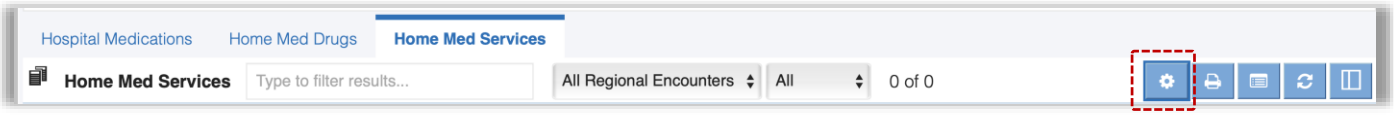


The preferences also include options to customize the DHDR reports PDF layouts by defining landscape or portrait.

How to Set Your Pharmacy Default View

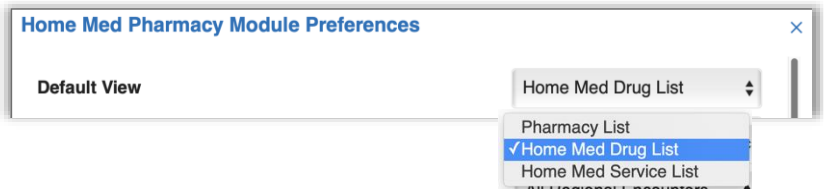
The Preference settings in any Pharmacy tab can be used to set your Pharmacy default view to either Home Med Drugs, Home Med Services or Hospital Medications.

1. Select the Preferences icon from any of the three tabs in the Pharmacy module.



2. Use the **Default View** field to select one of the three tabs as your Pharmacy module default.

   Note: Pharmacy List will default the view to the Hospital Medications.

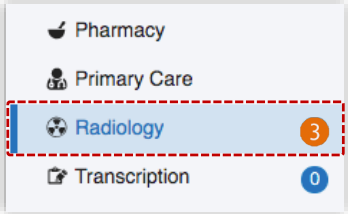


3. When you're finished, ensure you click **Save & Apply** to save your preferences.

Radiology Module

Show Me

Ask a Question



The Radiology module provides a list of the patient's radiology studies and allows you to view diagnostic reports and images. Radiology images and reports are integrated from the Southwestern Ontario Diagnostic Imaging Network (SWODIN) and Ontario Health's DI Common Service (DI-CS). Supported browsers: Internet Explorer 10+, Safari 6.0+, Google Chrome 20+ and Firefox 14+

New Result Indicators

If New Results are available, this module will be flagged
(Refer to New Results & Preferences section in the user guide).

Reports from DI-CS and St. Joseph's Healthcare Hamilton currently, will not generate a New Results flag in the Radiology module.

Diagnostic Imaging (DI) Common Service

ClinicalConnect users at participating organizations that have completed the necessary agreements with Ontario Health will have access to diagnostic imaging reports and images from Ontario Health's DI Common Service. This includes studies conducted at hospitals outside south west Ontario and by certain community-based diagnostic imaging centres from across the province.

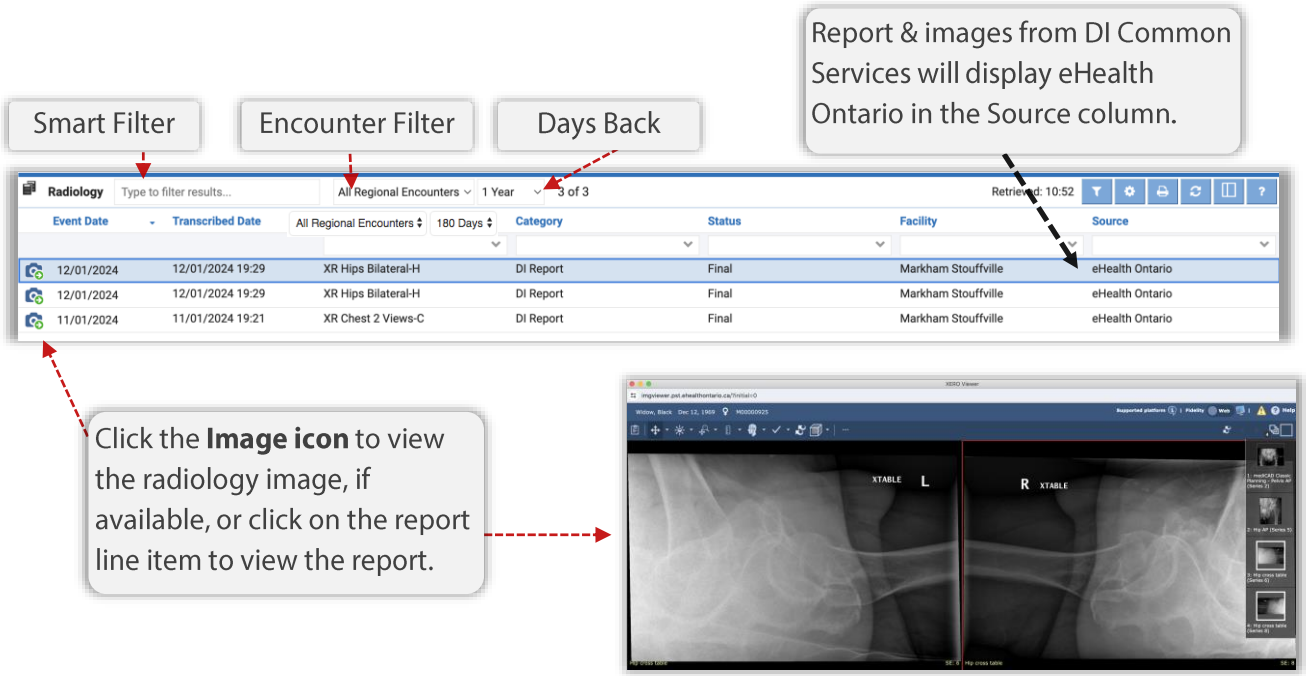
The DI Common Services reports already available from hospitals outside of South West Ontario in the Radiology module will now include the corresponding diagnostic images and will display the camera icon beside the report line item as shown in the image below.

A list of hospitals and independent health facilities that contribute data to the DI Common Service is available from the Ontario Health site: https://ehealthontario.on.ca/connectingontario-data-summary/DICS_data_summary.html.

Provincial repositories such as DI Common Services retrieve information based on the patient's **Health Card Number (HCN)** match. In cases where a HCN is not available or invalid, data from the provincial repositories will not be accessible.

DI Common Service Reports and Images

Radiology reports and images display in a sortable list and will include reports and images from the provincial repository as shown below.



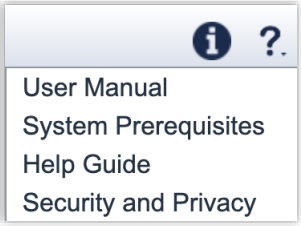
Types of Radiology Viewers

Radiology image display using the following viewers:

- GE Centricity Universal Zero Footprint (ZFP) Viewer - for SWODIN images contributed by all hospitals.
- Agfa XERO viewer - for images from DI Common Service.

Please refer to the reference guides below for more detailed information.

SWODIN Images - GE Centricity Universal Zero Footprint (ZFP) Viewer



The GE Centricity Universal Zero Footprint (ZFP) Viewer is used to view all SWODIN images and is approved for diagnostic use.

The complete GE Centricity Universal Zero Footprint (ZFP) Viewer guide can be access from the viewer's Help icon.

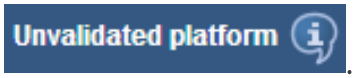
A quick reference guide is available from the following link:

Radiology Image Viewer: GE Centricity ZFP Quick Reference Guide
http://info.clinicalconnect.ca/CC/storage/documents/Quick guide ZFP viewer V6.0 S1.1.pdf

Ontario Health's DI Common Service viewer: Agfa XERO Reference Guide

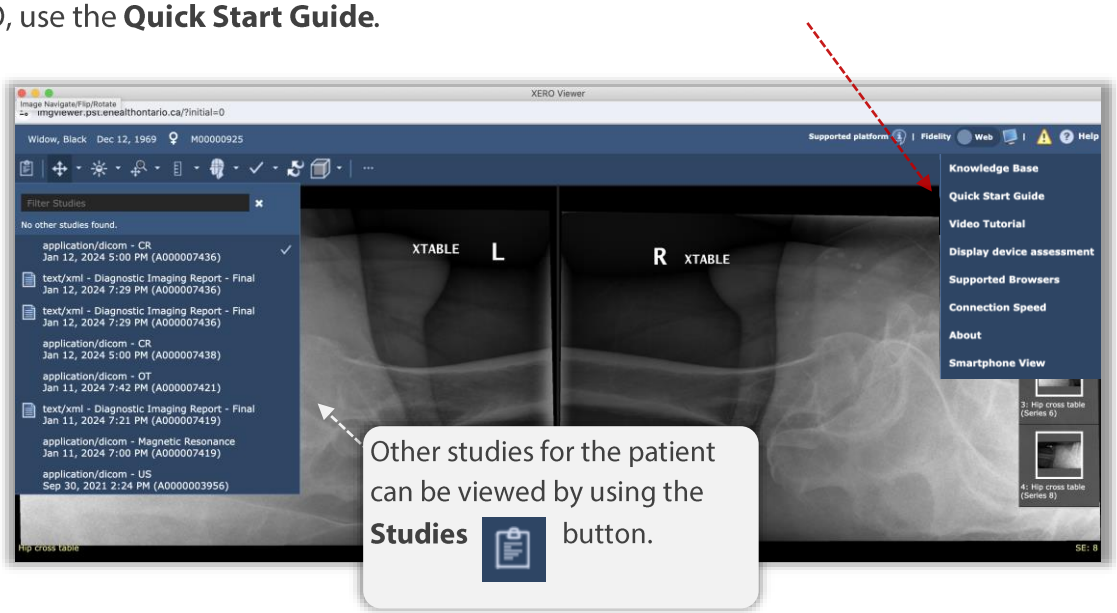
Radiology images from Ontario Health's Diagnostic Imaging Common Service (DI-CS) repository use the Agfa XERO viewer. By default, all users are configured to use the viewer as a reference viewer and is **not approved for diagnostic use**. Full fidelity viewing is available only with the validated platforms and devices indicated as **Full fidelity viewing** in the **Supported Browsers** section of the Agfa XERO help function.

NOTE: The viewer is not intended for the display of digital mammography images for diagnosis.

If you attempt to view images in full fidelity mode using an unvalidated platform, an **Unvalidated platform** warning is displayed 

. You must either accept or decline the warning before continuing.

To access the AFGA help function and the technical specification resources, click on the Help, located at the top the screen as shown below. If you would like to learn more about using Agfa XERO, use the **Quick Start Guide**.

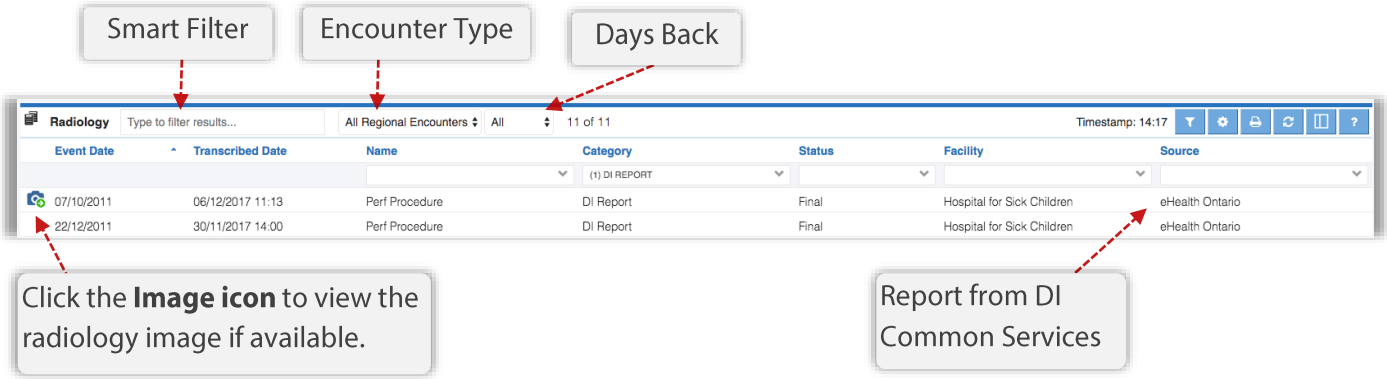


DI Common Service and Consent Directive

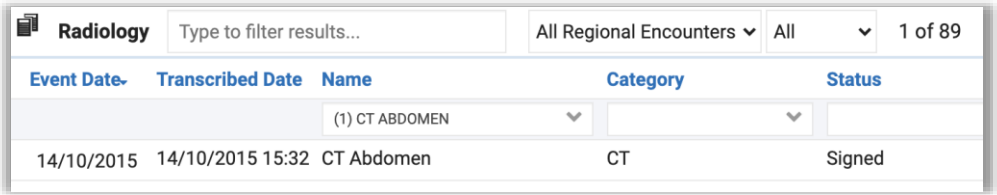
A patient has the right to withdraw consent to access and use of their full or partial records from DI Common Service through the current Ontario Health process. ClinicalConnect will honour consent restrictions and display the following message in the patient's ClinicalConnect record:

There is a consent directive in place for the selected patient

Clinicians may contact Ontario Health Service Desk Support at 1-866-250-1554 or email at OH-servicedesk@ontariohealth.ca..

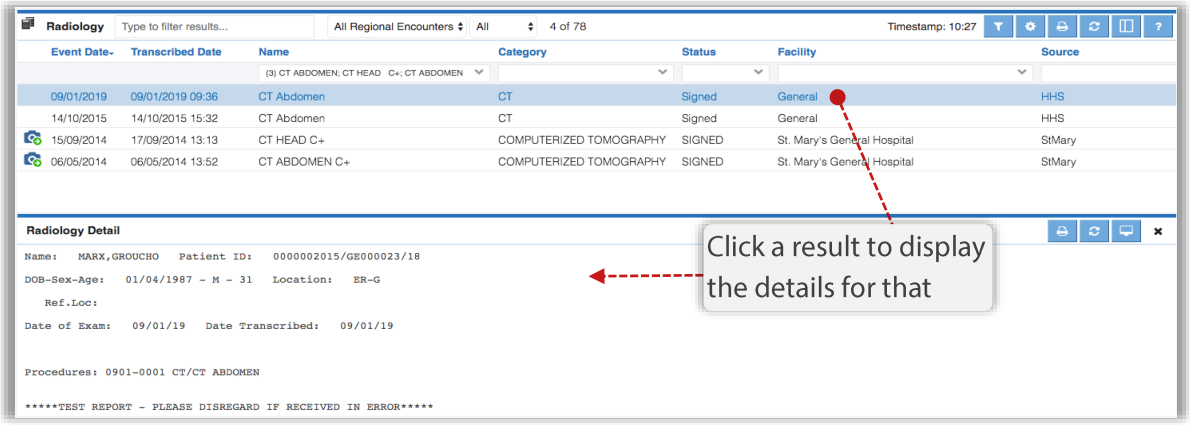


The following table provides a summary of some of the key features of the Radiology module.

Feature	Summary
Smart Filter	The Smart Filter is used to narrow down the list of radiology results to display only those related to the text you entered in the filter. Example: **ct hhs** is entered in the Smart Filter box. The Smart Filter searches the Radiology List grid for any row that contains text that begins with both **ct AND hhs**. All other orders are filtered out and do not display in the view. Only one result was found for a CT Abdomen from HHS.  See the Smart Filter section to learn more about filtering results and lists with the Smart Filter tool.
Images Icon	Reports with images will have an Images icon displayed in the first column. Clicking the camera icon launches the image in a new browser window.

Viewing Radiology Details

Radiology results are displayed in a sortable list. Click the row of the result you want to view to see the report details.



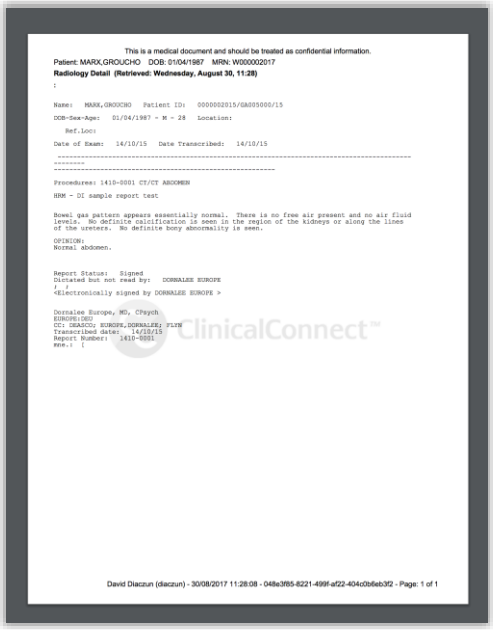
Depending on your preference settings, the Radiology Details will either show up to the right of the results list or below the results list.

Printing Radiology Results and Details

Printing from some ClinicalConnect modules creates a PDF document which indicates that you have generated a medical document which should be treated as confidential. The page is watermarked with the ClinicalConnect logo and identifies your name, the date, and time the document was generated.

To print Radiology results or details:

1. Click the **Print** button found in the Radiology header or details window of the screen you want to print.
2. Use your browser's document viewer to complete the printing process.


This is a medical document and should be treated as confidential information.
Patient: MARX,GROUCHO DOB: 01/04/1987 MRN: W000002017
Radiology Detail (Retrieved: Wednesday, August 30, 11:28)

Name: MARX,GROUCHO Patient ID: 0000002015/GA005000/15
DOB-Sex-Age: 01/04/1987 - M - 28 Location:
Ref.Loc:
Date of Exam: 14/10/15 Date Transcribed: 14/10/15

Procedures: 1410-0001 CT/CT ABDOMEN

HRM - DI sample report test

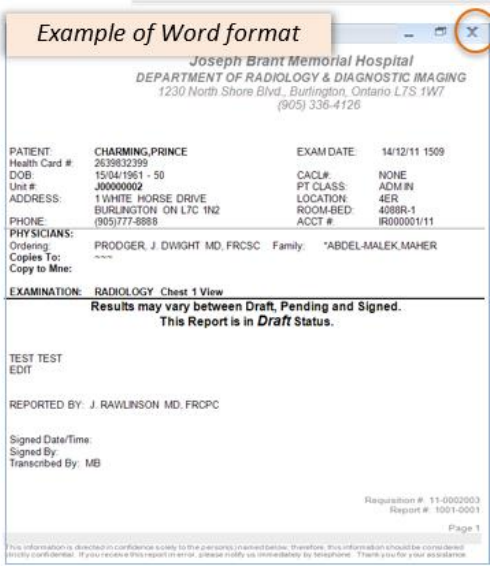
Bowel gas pattern appears essentially normal. There is no free air present and no air fluid levels. No definite calcification is seen in the region of the kidneys or along the lines of the ureters. No definite bony abnormality is seen.

OPINION:
Normal abdomen.

Report Status: Signed
Dictated but not read by: DORNALEE EUROPE
<Electronically signed by DORNALEE EUROPE >

Dornalee Europe, MD, CPsych
EUROPE:DEU
CC: DEASCU; EUROPE,DORNALEE; PIXN
Transcribed date: 14/10/15
Report Number: 1410-0001
MRM.1 (

David Diaczun (diaczun) - 30/08/2017 11:28:08 - 048e3f85-8221-499f-af22-404c0b6eb3f2 - Page: 1 of 1



Joseph Brant Memorial Hospital
DEPARTMENT OF RADIOLOGY & DIAGNOSTIC IMAGING
1230 North Shore Blvd., Burlington, Ontario L7S 1W7
(905) 336-4126

PATIENT: CHARMING,PRINCE
Health Card #: 2639832399
DOB: 15/04/1961 - 50
Unit #: J00000002
ADDRESS: 1 WHITE HORSE DRIVE BURLINGTON ON L7C 1N2
PHONE: (905)777-8888
EXAM DATE: 14/12/11 1509
CACL#: NONE
PT CLASS: ADMIN
LOCATION: 4ER
ROOM-BED: 4088R-1
ACCT #: IR000001/11
PHYSICIANS:
Ordering: PRODGER, J. DWIGHT MD, FRCSC Family: *ABDEL-MALEK,MAHER
Copies To:
Copy to Mne:

EXAMINATION: RADIOLOGY Chest 1 View
Results may vary between Draft, Pending and Signed.
This Report is in *Draft* Status.

TEST TEST
EDIT

REPORTED BY: J. RAWLINSON MD, FRCPC

Signed Date/Time:
Signed By:
Transcribed By: MB

Requisition #: 11-0002003
Report #: 1001-0001
Page 1

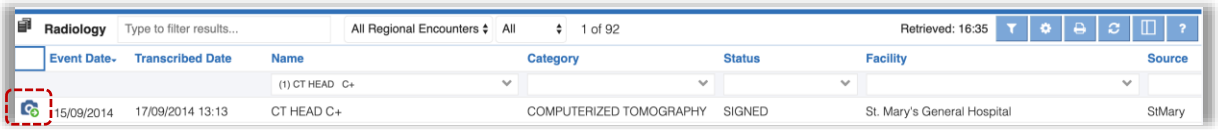
Printing options vary depending on browser and location. Check with your technology team if you're having issues printing information from ClinicalConnect. Adobe Reader 10.1.4 or higher is recommended to view records presented as PDFs in ClinicalConnect.

Viewing Radiology Images

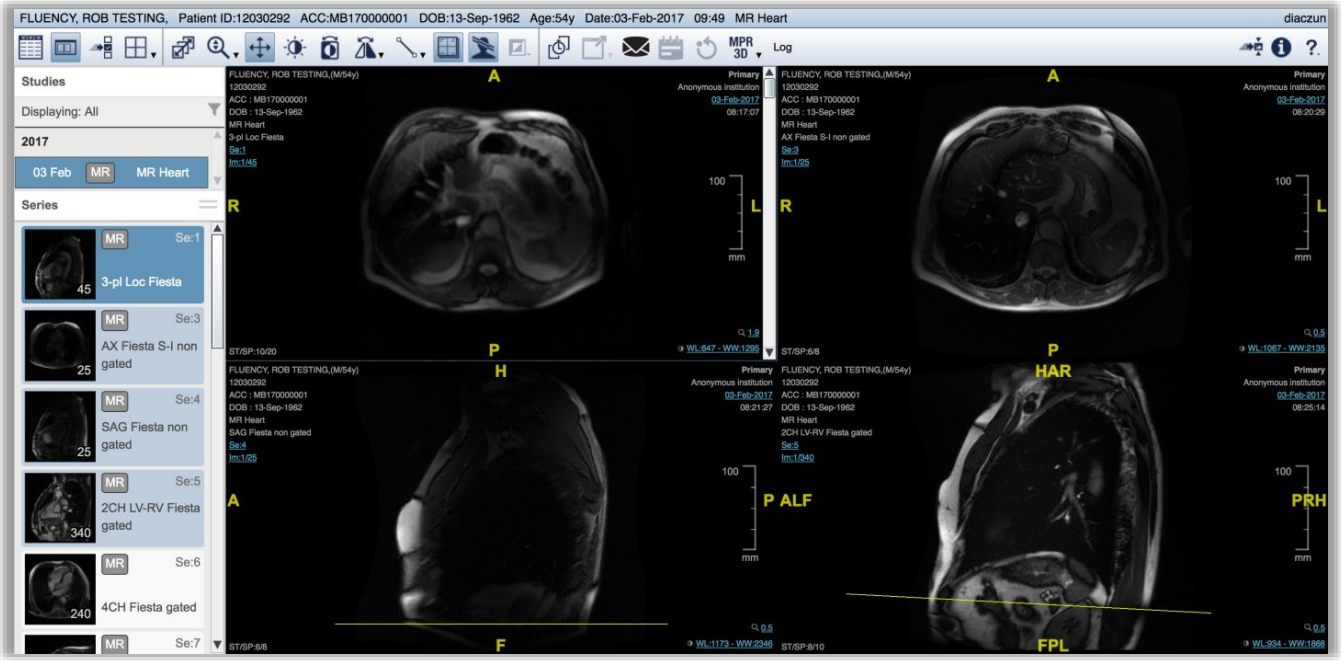
Images may not be available for all reports presented in the module list and do not display the camera icon. SWODIN images need to be launched outside of Citrix in some corporate environments that do not support a compatible browser.

To view radiology images:

1. Click the camera icon



2. A new browser window or tab will display the imaging in the viewer window.



Grouped Multiple Images

In some cases, source hospital systems that contribute radiology images may have grouped multiple images from multiple exams (including multiple exam types) under one exam if those exams were completed on the same day. Each exam will be listed in the Radiology module with a camera icon but may not contain the associated exam image.

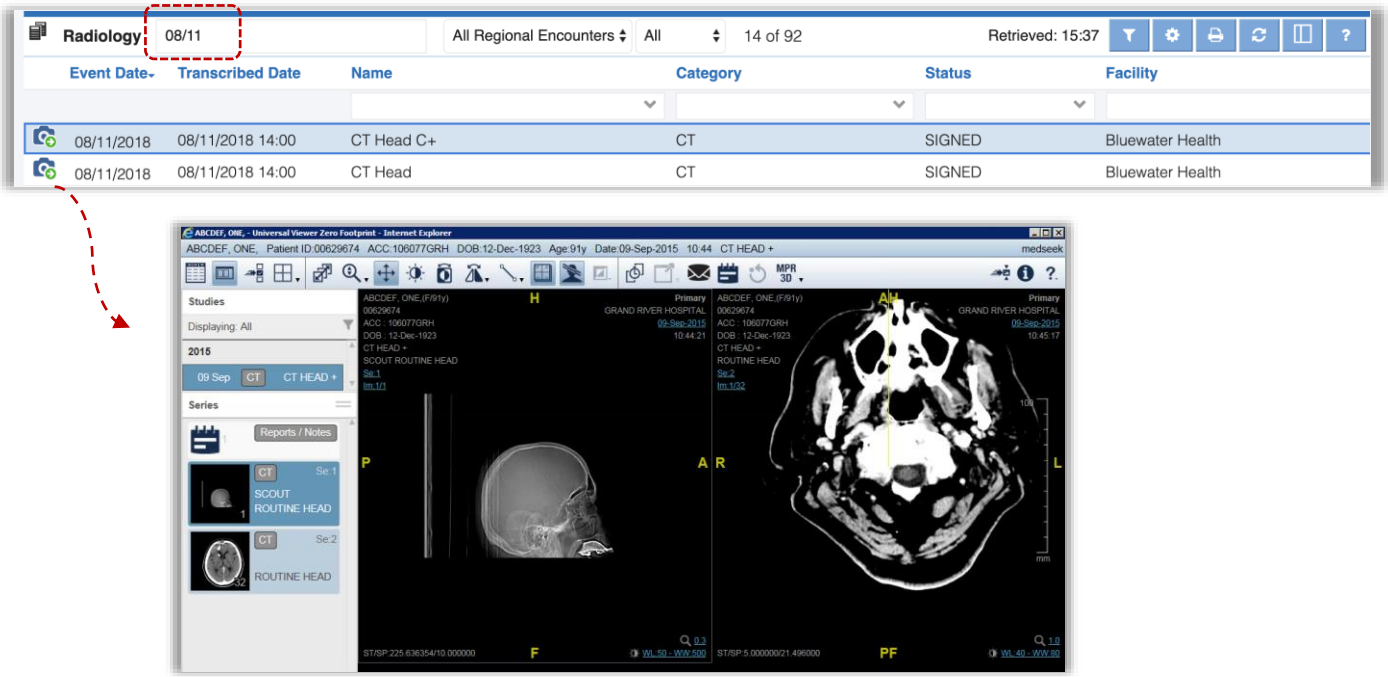
Example: Nuclear Medicine Studies

Click the thumbnail of the desired image series. (SC prefix mnemonic indicates screen capture)

It is recommended to look for other reports from the same day and launch the camera icon to review the grouped images:

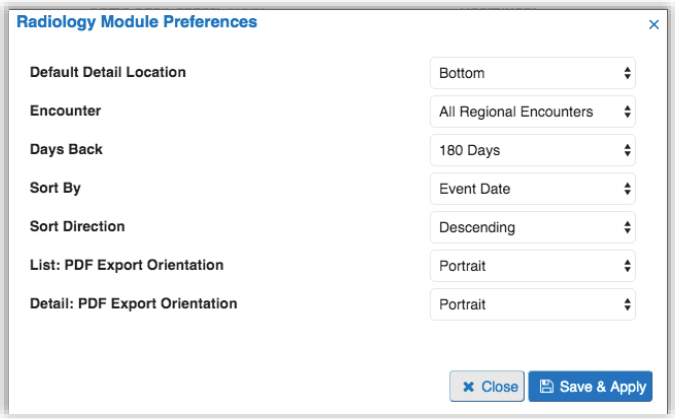
Example:

1. Enter the date of the exam in the Radiology Smart Filter text box using the DD/MM/YYYY format. All results from that day are displayed in the Radiology results list.
2. Click each camera icon to view image results until you find the images you were looking for.



Radiology Preferences

The Radiology module has its own set of preferences that can be accessed and configured by clicking the Preferences button in the module header or by using the Preference Setup Wizard.



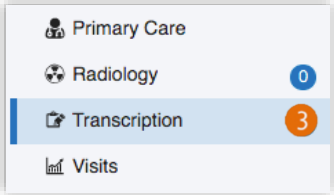
After updating your preference settings, click the **Save & Apply** button to save your changes.

To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

Transcription Module

Show Me

Ask a Question



The Transcriptions module displays transcription reports from multiple hospital source systems including information available from Ontario Health's Acute and Community Clinical Data Repository (acCDR).

To access the Transcription module, select Transcription from the Clinical Modules menu.

New Result Indicators

If New Results are available, this module will be flagged with an orange indicator as shown in the example. (Refer to the New Results & Preferences section in the user guide for more information).

Reports from acCDR and St. Joseph's Healthcare Hamilton will not currently generate a new results flag in the Transcription module.

Acute and Community Clinical Data Repository (acCDR)

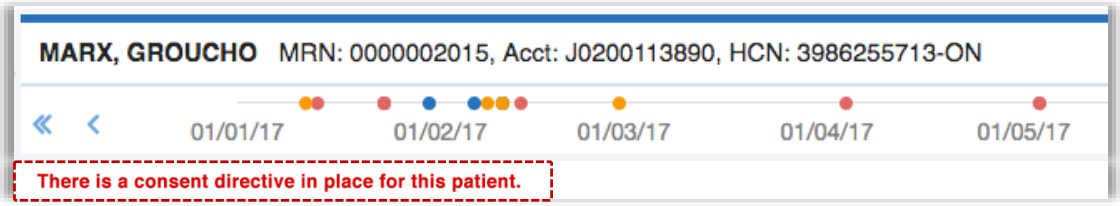
If information is available from Ontario Health's Acute and Community Clinical Data Repository (acCDR), which populates the patient's Transcriptions and Home and Community Care modules, the modules will show the name of the contributing facilities and the Source column will show eHealth Ontario.

This data can only be accessed from its supported module if your Participating Organization has signed the appropriate Ontario Health agreements.
Information from provincial repositories is not accessible if the Health Card Number is not available or is invalid. These encounter types cannot be selected from the Visits module and will not display in the Patient Visits Timeline.

Acute and Community Clinical Data Repository (acCDR) Consent Directive

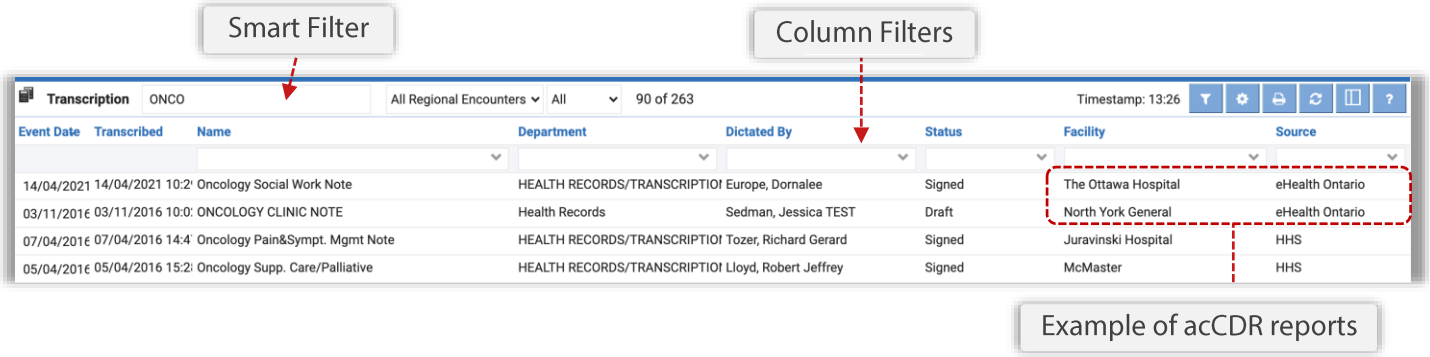
A patient has the right to withdraw consent to the access and use of their full or partial records from acCDR through the current Ontario Health process. ClinicalConnect honours any partial or full consent restriction and will display the following message in the Transcription and Visits modules:

There is a consent directive in place for the selected patient.



If access to a blocked record is required, you may contact Ontario Health's Service Desk Support at 1-866-250-1554 or by email at OH-servicedesk@ontariohealth.ca.

In cases where the report is from a source contributing system that has multiple facilities, the Facility column will display the name of the site.

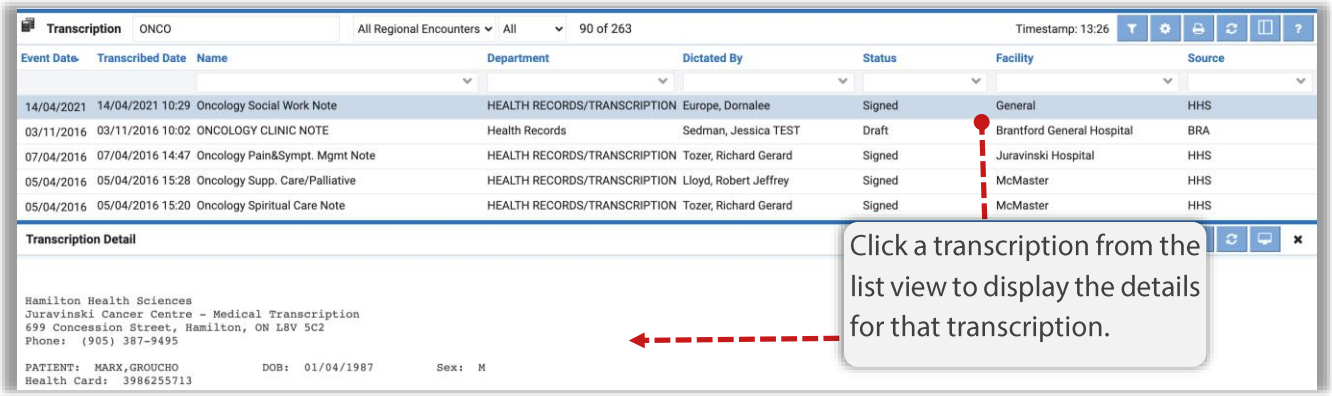


To view acCDR reports, ensure the encounter filter is set to **All Regional Encounters**. acCDR report **Status** types include:

- **New** - Preliminary report
- **Completed** - Final report
- **Held** - Corrected/updated report

Viewing Transcription Details

Transcription reports details can be viewed by clicking on the transcription you want to view from the list view. Depending on your preference settings, the Transcription Detail will display below the list of reports or to the right in a side-by-side view.



In some cases, Hamilton Health Sciences clinic reports may be listed as a line item in the module, however if the visit is still in progress, no report will be available until the visit is complete.

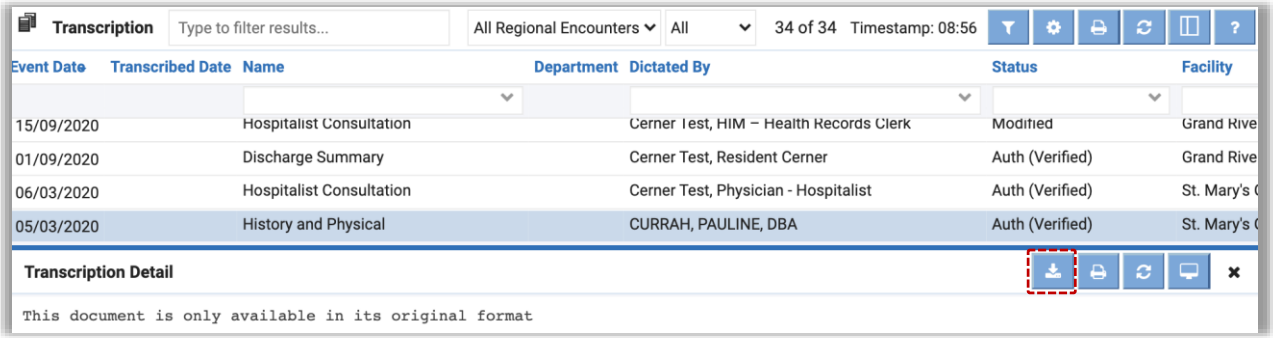
Acute and Community Clinical Data Repository (acCDR) Supported Report Types:
acCDR Transcription reports may be available from the repository as Text, PDF, RTF or image formats (TIFF, PNG, JPEG). These report types will display in PDF format when launched from ClinicalConnect. All other report types (such as wav, mp3) are not supported and will display a message indicating that this document type is not supported as in the example below.

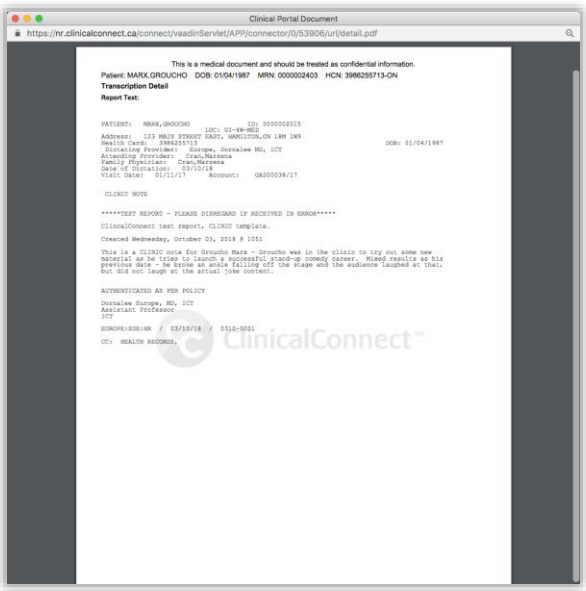
```
format not supported
```

Viewing Transcriptions in Original Format

Transcriptions from select source systems, when selected, may open in their original format such as PDF or Word, rather than in the details view. These types of transcriptions will display the following message in the details screen: **This document is only available in its original format**.

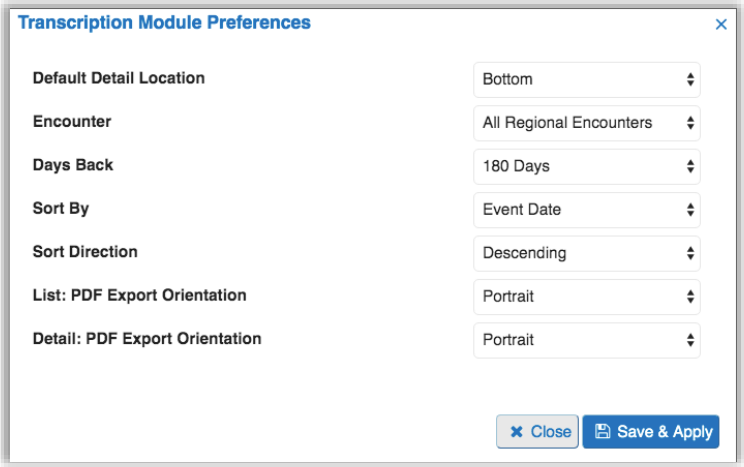
To view the report, first, click the download icon to download the transcription, then open the transcription which will display in its original format. Once the download is complete, you can open the transcription in PDF or Word viewer of your choice.





Transcription Module Preferences

The Transcriptions module has preferences that can be customized based on how you prefer to see the information presented in the view. To customize your preferences, click the **Preferences** button in the module header.



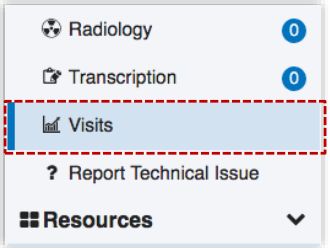
After updating your preference settings, click the **Save & Apply** button to save your changes.

To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

Visits Module

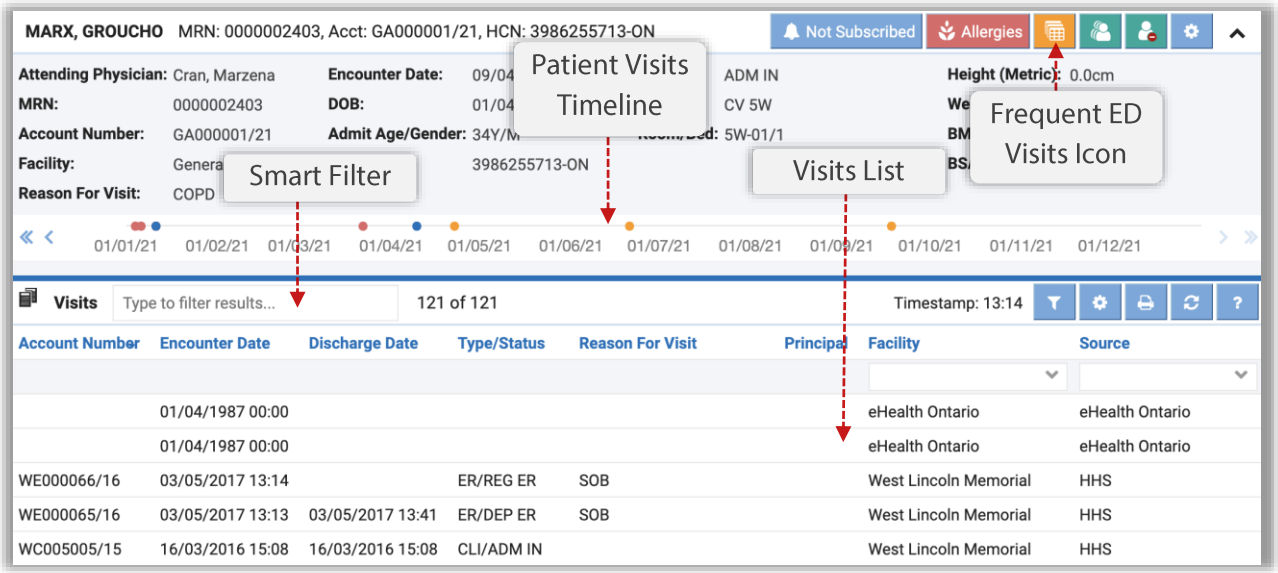
Show Me

Ask a Question



The Visits module displays a list of all patient acute care encounters including Home and Community Care encounters. Future scheduled outpatient visits may also be available from source hospital systems and will display the date and time in the "Encounter Date" field. This module is helpful when reviewing the patient's visit frequency and history of the patient's encounters.

To access the Visits module, click the **Visits** option in the Clinical Modules menu.



The following table provides a summary of some of the key features of the Visits module.

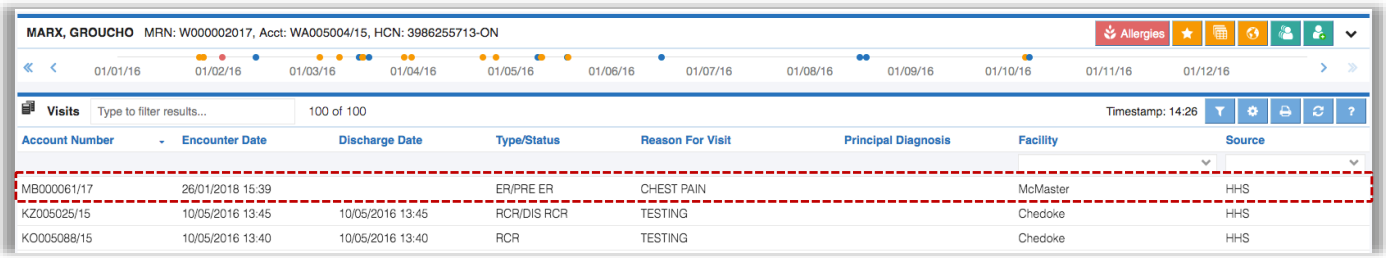
Feature	Summary
Patient Visits Timeline	The Patient Visit Timeline is an interactive timeline that provides a visual display of a patient's past and future (when available) visit history available from acute care facilities and matches the encounter information listed in the Visits module. The patient visits timeline displays at the top of the record, showing all hospital encounters within the selected year. When available from the hospital system, future scheduled appointments are also shown.
Frequent ED Visits Icon	A patient that has had five or more emergency department (ED) visits at any acute care facility in south west Ontario in the last 366 days will show the Frequent ED Visits quick alert icon in their patient header. Clicking the Frequent ED Visits icon will take you to the Visits module for a list of all that patient's encounters.

Selecting Different Encounters

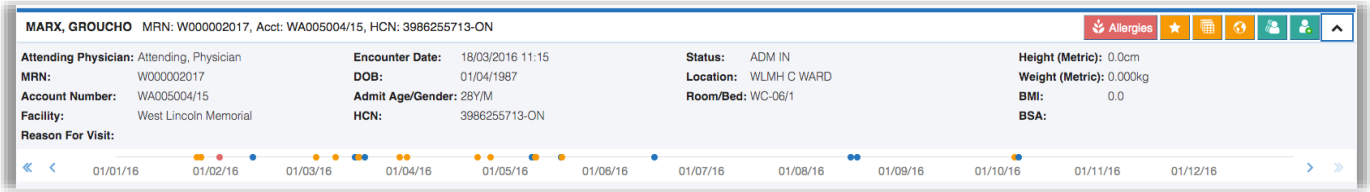
The Visits module allows you to access different patient encounters. Click the encounter you want to view from the Visits to switch to that encounter.

For example:

If you wanted to view the Chest Pain visit of a patient at McMaster on January 26th, 2018 click the row of that visit to view more details about that encounter.

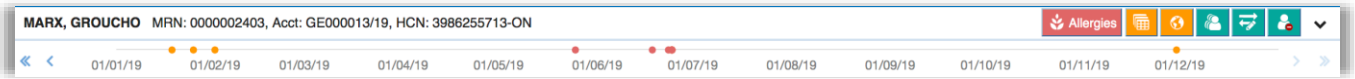


The patient demographic information below the header will display information about the selected visit.



Modules that only display data related to a specific encounter (for example: the Admissions module) will also update to match that selected visit.

The Visit encounters from acute care hospitals are also displayed in the Patient Visits Timeline. This module is helpful when reviewing the type, frequency, and history of the patient's encounters.



OLIS Data

OLIS in a visits Facility column indicates that the patient has OLIS data. You cannot access OLIS information directly from the visits. Instead use the Labs, Microbiology, or Pathology and Genetics modules (depending on which result is available) to access the OLIS results.

Visits | Type to filter results... | 36 of 100 | Timestamp: 15:56

Account Number	Encounter Date	Discharge Date	Type/Status	Reason For Visit	Principal Diagnosis	Facility	Source
						(3) OLIS; EHEALTH ONTARIO; GENERAL	
3986255713						OLIS	OLIS
GZ000022/18	30/11/2018 13:55	30/11/2018 13:55	RCR/REG RCR	TEST		General	HHS
GU005000/15	28/10/2015 15:29	28/10/2015 15:29	CLI	PNEUMONIA		General	HHS
GN000002/16	23/01/2018 13:38	23/01/2018 13:38	REF/REG REF			General	HHS

Ontario Health

In cases where the patient's Health Card Number (HCN) matches data available from provincial repositories (Diagnostic Imaging Common Service, Digital Health Drug Repository, and Acute CDR), the Visits module will display **eHealth Ontario** in the facility and source fields.

Visits | Type to filter results... | 36 of 100 | Timestamp: 15:56

Account Number	Encounter Date	Discharge Date	Type/Status	Reason For Visit	Principal Diagnosis	Facility	Source
						(3) OLIS; EHEALTH ONTARIO; GENERAL	
	01/04/1987 00:00					eHealth Ontario	eHealth Ontario
GA000038/17	01/11/2017 15:59		IN/ADM IN			General	HHS
GA005000/15	24/09/2015 08:36		IN/ADM IN	EXACERBATION OF COPD		General	HHS
GA005147/15	15/03/2016 11:32	15/03/2016 00:00	IN	TEST NAME CHANGE		General	HHS

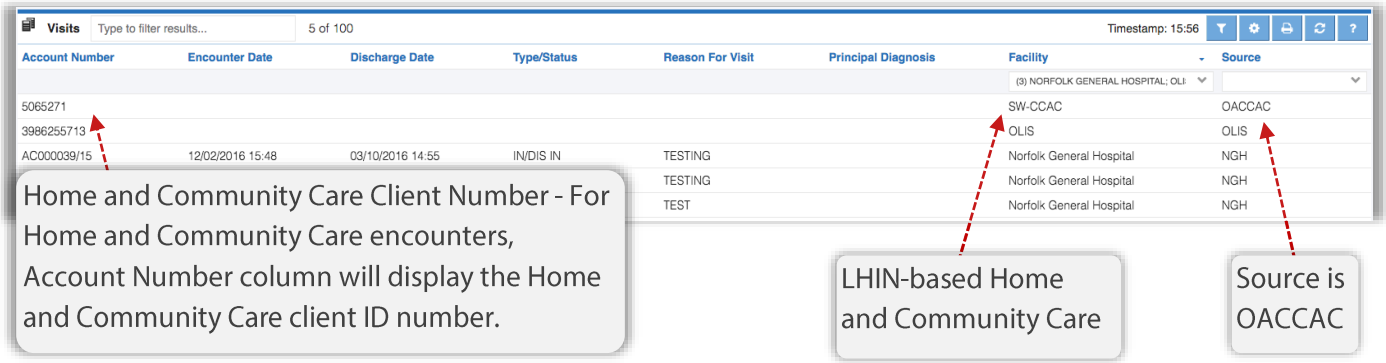
This data can only be accessed from its supported module if your Participating Organization has signed the appropriate Ontario Health agreements.

Information from provincial repositories is not accessible if the HCN is not available or is invalid.

Home and Community Care

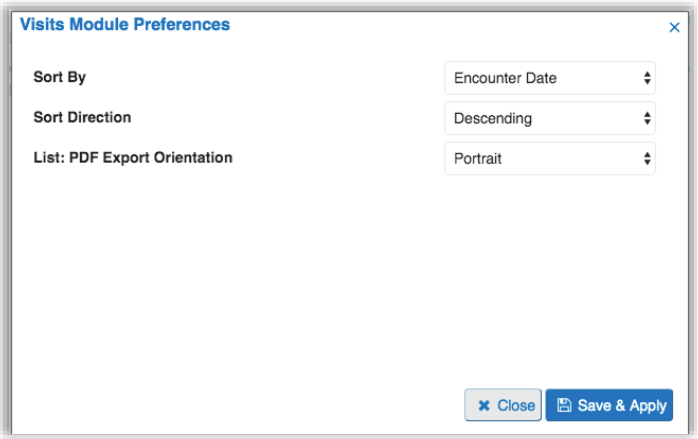
Home and Community Care encounters are available from the Visits module. Home and Community Care encounters are identified with the specific LHIN-based Home and Community Care in the facility column and OACCAC in the source field. If the client has had Home and Community Care services across all four regions, each encounter will be identified in the facility field.

Selecting the Home and Community Care encounter from the search results list will open the Home and Community Care module for that patient.



Visits Preferences

The Visits module has its own set of preferences that can be accessed and configured by clicking the Preferences button in the module header or by using the Preference Setup Wizard.

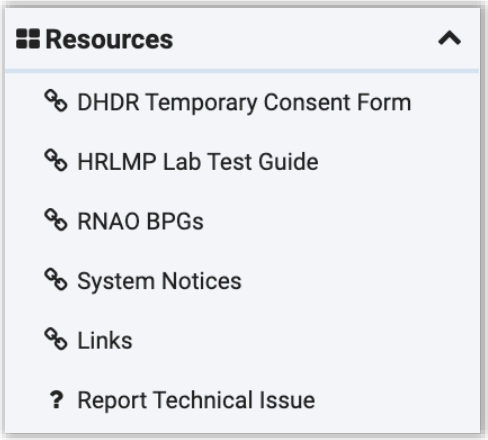


After updating your preference settings, click the **Save & Apply** button to save your changes.

To learn more about the various preference setting options, please visit the Common Preference Settings in ClinicalConnect section.

Resources

The Resources section of ClinicalConnect contains various helpful links or access to modules and is located on the left of the screen and below the clinical modules when viewing a patient's record. Depending on the user's access privileges, not all of the resources shown below will apply to all users. This section will describe each of the resources and how they can be used by authorized users.



DHDR Temporary Consent Form

This is a link to the MOHLTC's **Temporary Unblocking of Access to Your Drug and Pharmacy Service Information** form. The use of this form is further described in the Pharmacy module - Home Med Drugs section of this guide.

HRLMP Lab Test Guide

This is a link to the Hamilton Regional Laboratory Medicine Program (HRLMP) Lab Test guide. The site contains various information related to lab testing, specimen collections, requisitions and other lab-related resources.

RNAO BPGs

This is a link to the Registered Nurses' Association of Ontario (RNAO) Nursing Best Practice Guidelines. The purpose of the Best Practice Guideline program is to support Ontario Nurses by providing them with Best Practice Guidelines for client care. For more information visit: www.RNAO.ca The RNAO has developed condensed guidelines for PDAs that puts knowledge at your fingertips.

System Notices

Please refer to the System Notices section in this guide for more information.