



Alberta Netcare Portal Community Access

SETUP GUIDE

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WELCOME

The purpose of this setup guide is to assist you with the setup of your Alberta Netcare Portal (ANP) account. Completion of the activities in this guide will require approximately 15 to 20 minutes.

Instructions

1. Before you start the setup process, you will need the following:
 - Your Alberta Netcare User ID, which is the ID you will use to login to RSA, ANP and PIN/PD.
 - Your Alberta Netcare unique temporary password. Each user will receive a unique temporary password that will be used for both ANP and PIN/PD.
 - Your RSA SecurID token - either a hard token (fob) or a soft token (on your smart phone).

PLEASE NOTE: *There is only one Alberta Netcare user ID. This is NOT single sign on to get access to full functionality within ANP. Users are still required to sign into both applications – Pharmaceutical Information Network (PIN) and Person Directory (PD) to get PIN/ PD access.*

2. If you are missing any of the above or if you have questions about any of the setup activities, call the Provincial Help Desk toll-free at 1-877-931-1638.

Best Practices

1. Never share your Alberta Netcare User ID and/or password. You are responsible for all access to Alberta Netcare Portal that occurs under your security credentials.
2. Only access health information necessary to fulfill your job responsibilities, and keep this information confidential.

Never access information for non-business purposes

Never access health information for yourself, family, friends, neighbours or co-workers! If you have any questions about what information you should access, call the Health Information Act (HIA) Help Desk at 780-427-8089 or toll-free 310-0000+780-427-8089.

3. When you have finished using Alberta Netcare Portal, be sure to click the Logout button at the top left of the Menu Bar, close the browser, and lock your computer (Ctrl + Alt + Delete) when you step away from a workstation.
4. When printing information from a patient's Electronic Health Record (EHR), follow the policy set at your work site regarding the use and storage of these print-outs.

Where do I go for more information?

The Alberta Netcare [Learning Centre](#) contains information (such as instructions, FAQs, electronic demos, learning paths, etc.) on how to use applications that are accessed through the EHR Viewer such as:

Alberta Netcare Portal (ANP)

Person Directory (PD)

Pharmaceutical Information Network (PIN)

eReferral

Delivery Site Registry (DSR)


There is also a Learn by Role section which specifically references resources associated with each Alberta Netcare Portal access role.

To use the Learning Centre information, always open the Learning Centre prior to logging in to the LIVE Alberta Netcare Portal. You will then have access to the Learning Centre while you work in Alberta Netcare Portal.

Security and Confidentiality

Only authorized users may access a person's medical and demographic data. EHR access is based on your user role, profession, and is site-based. Access, permissions, and other security credentials are set up to ensure you have enough information available to do your job, and that information is accessed only on a need-to-know basis for the site(s) at which you are registered. Be aware that Alberta Netcare Portal access is routinely monitored and audited, and can also be audited at the request of a patient, physician or manager.

By accessing Alberta Netcare, you agree to be bound by the Terms of Use and Disclaimer as noted on the Alberta Netcare Portal Login page, and to comply with all applicable legislation.



TERMS OF USE AND DISCLAIMER:

IMPORTANT - This application is for the use of authorized users only. Unauthorized access to this application is prohibited and may result in serious disciplinary action. Please read these terms of use carefully before accessing or using the Alberta Netcare EHR application. By accessing Alberta Netcare you agree to be bound by these terms and to comply with all applicable laws.

Restrictions on Use:

1. You agree that the information in and accessible through Alberta Netcare (the "Information") is private and confidential and that you will take all reasonable steps to maintain the confidentiality of the Information. You further agree that you are aware of and will comply with the provisions of the Health Information Act and the Freedom of Information and Protection of Privacy Act, as applicable, with respect to the Information.
2. You understand that a person who knowingly collects, uses or discloses health or personal information in contravention of the Health Information Act or the Freedom of Information and Protection of Privacy Act may be found guilty of an offence and liable to a fine of up to \$50,000.
3. You agree that you will not use the Information for commercial purposes.

Disclaimer and Limitation of Liability:

4. You understand that Alberta Netcare, and the Information accessible through it, are provided by Alberta Health and Wellness ("AHW") on an "as is" and "as available" basis. Use of Alberta Netcare and the Information is at your sole risk and is in no way intended to replace or be a substitute for your professional judgment. AHW makes no representation or warranty, express or implied, as to the operation of Alberta Netcare, and assumes no legal liability or responsibility for the accuracy, completeness, or usefulness of any information provided through the application.

Security Notice:

5. You are aware that AHW monitors access to Alberta Netcare for security purposes and to protect the Information. By accessing Alberta Netcare you are expressly consenting to these monitoring activities.

About Remote Community Users

Launching Alberta Netcare Portal from a site in the community is considered remote access. You must first download a Citrix platform to enable this remote access and then use additional security to confirm your identity (authenticate) using an RSA SecurID (Alberta Netcare User ID) and token code.

RSA SecurID is an authentication mechanism that uses a "token code" as an extra layer of security. The token code is generated by either a SecurID fob (hard token), or by a smart phone app (soft token). Your token will generate a new authentication code every 60 seconds.

SETUP ACTIVITIES

Activity 1: Download Citrix Software

For detailed instructions on installing Citrix, please see Appendix A.

Activity 2: Access the Alberta Netcare Portal

Step 1: Hard Token / Soft Token

For hard token: For hard token: Log in to Citrix using your Alberta Netcare User ID in the User name field, then enter your passcode. The passcode is a combination of a user-selected PIN and the six-digit code that is generated by the hard token.

For first time log in, enter the six-digit code and the system will prompt you to create your user-selected PIN.

For soft token: Log in to Citrix using your Alberta Netcare User ID in the User name field. Enter your 4 digit user selected PIN on your smart phone, then enter your passcode. The passcode is an 8-digit number generated by the SecurID app on your smart phone.

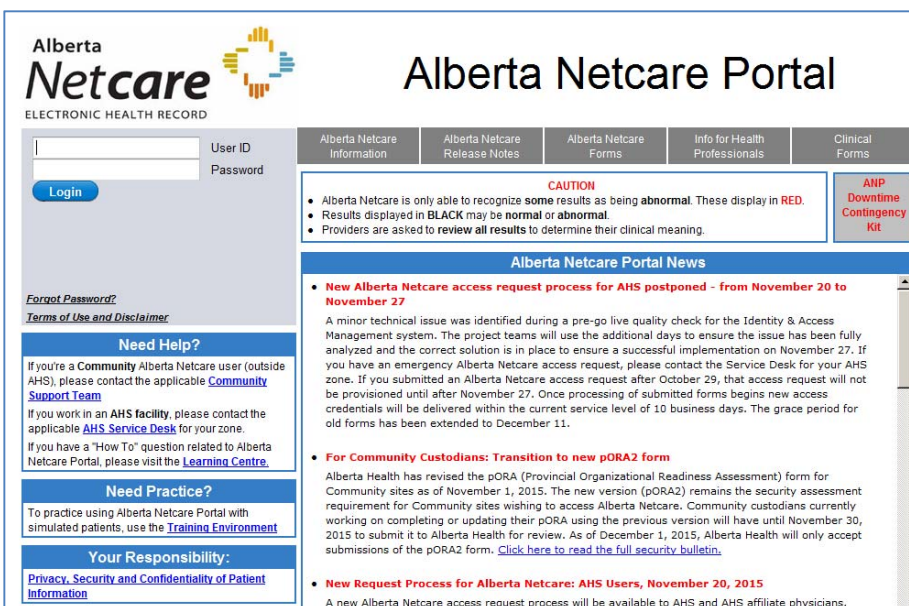
Step 2: ANP Icon

Once Citrix has been installed and you have passed the RSA Secure ID login, click on the **ANP icon** in the applications box.



Step 3: Login to ANP using your Alberta Netcare User ID and unique temporary password

The Alberta Netcare Portal Login page will display.



- ◆ On the ANP login page, type your **Alberta Netcare User ID** in the **User ID** field

- ◆ Type your **unique temporary password** in the **Password** field
- ◆ Click **Login**
- ◆ You will receive a message stating “**Your Password has expired and must be changed**”
- ◆ Click **OK**

Create a new password

You are prompted to change the unique temporary password that was supplied to you:

- ◆ Type your **unique temporary password** in the **Old Password** field
- ◆ Type your **new password** in the **New Password** field

A message is displayed providing feedback regarding the compliance of the password with the Alberta Netcare password standards (see below).

- ◆ Revise as necessary, then type your **new password** again in the **Confirm Password** field
- ◆ Click **OK**
- ◆ This password will expire in 120 days

Alberta Netcare Password Standards

All passwords must meet the following criteria, unless approved through the Security Policy Exception Process:

- Minimum length of 8 characters.
- Must include a combination of 3 of the following:

alpha-upper case (ABCDE)

alpha-lower case (fghij)

numeric (12345)

special characters (@#\$%& -do not use underscore “_”)

- Must not contain your user name or full name.
- Will expire after 120 days.
- Cannot be reused for 13 iterations.
- A minimum of 5 invalid logins is allowed before being locked out. Call the Help Desk to reset your password.

Insecure passwords can be easily compromised – applying the Alberta Netcare password standards minimizes unauthorized access to patient data.

Activity 3: Configure Your Homepage

Alberta Netcare Portal opens to **Welcome to Your Homepage**. Take this opportunity to customize the homepage to display viewing areas called windowlets. These windowlets maximize your workflow.

Configure windowlets

On your homepage:

- ◆ Scroll down to the bottom left corner
- ◆ Click **Configure Layout** button

Configure “Search for a patient”

- ◆ Select **Search for a patient** from the dropdown selection in the windowlet.
- ◆ Click New Section Below

Configure “Person Directory”

- ◆ Select **Person Directory (PD)** from the dropdown selection in the lower windowlet.

PD must be available to complete PIN/PD password synchronization. If your ANP user role does not require PD or PIN access, ignore this step.

Confirm configuration layout

Click **Update Layout** at the bottom of the screen.

Search for a patient (TRAIN)

Patient Search

Identifier	<input type="text"/>		
Identifier Type	PHN / ULI	▼	
Last Name	<input type="text"/>	Date Of Birth	Day <input type="text"/> -- Month -- <input type="text"/> Year <input type="text"/>
First Name	<input type="text"/>	Sex	<input type="button" value="All"/> <input type="button" value="Female"/> <input type="button" value="Male"/>
Middle Name/Initial	<input type="text"/>	Phone Number	<input type="text"/>

Search Tip : An identifier search is recommended. For name search, please enter the complete last name, complete first name and date of birth.

Enter search criteria above and click 'Search'

Person Directory

Activity 4: Synchronize your ANP and PIN/PD passwords

Step 1: Change Your PIN/PD Password

- ◆ Open PD by clicking on the OPEN button that you configured on your Clinician Homepage.
- ◆ The screen below indicates everything has been set up correctly for access to PIN/PD.



- ◆ The **Login ID** is prepopulated with your Alberta Netcare User ID.
- ◆ The **Old Password** is prepopulated with your Temporary Password.
- ◆ Enter the ANP password you created into the **New Password** and **Confirm New Password** fields.

Reminder: Passwords must be at least 8 characters in length and include at least one upper case letter, one lower case letter and one number.

- ◆ Click the **Change Password** button.
- ◆ Close PD by clicking the **Quit** link at the top right of the PD window.

PLEASE NOTE: If the screen below displays, please call the **Provincial Help Desk** at 1-877-931-1638

Error accessing Person Directory

Incorrect user ID and/or password. [DPHI_000043]

Step 2: Enter Your New Password in “My Details”

Now that you have changed your password in PD, you will need to enter the new password in the “My Details” screen in ANP.

- ◆ Click on **My Details** in ANP (under the left menu panel under Common).
- ◆ Scroll down and click on the **Update Password** link beside PIN/PD Password.
- ◆ In the box that appears, type the new password you just created.
- ◆ Click on **Update Preferences**.

Next time you open PD, you should land in the application itself.

Activity 5: Further Configure “My Details”

Access “My Details”

- ◆ Click **My Details** (under **Common** in the menu on the left).
 - Choose the desired **Inactivity Timeout**. This is the amount of time that can pass without any activity before which the system will automatically log you out. (NOTE: The default Inactivity Timeout is 30 minutes). Your Inactivity Timeout should be set in accordance with the risk of breach of confidentiality in your work space. If you are working in a high traffic area, and / or are frequently called away from your computer, your Inactivity Timeout should be set to as short a time frame as is approved in your site’s policies and procedures.
- ◆ Enter your email address in the **Email Address** section under **Users**

If you use flowsheets as part of your role, you can change the number of columns displayed on a flowsheet.

Change Clinical Documents

Scroll down to **Clinical Documents**. You can make the following changes if you like:

- ◆ CDV Group Mode
- ◆ Default CDV Folder
- ◆ CDV Limited Records
- ◆ CDV Limited History Period

Clinical Documents

Access Reason Required	FALSE	Default CDV Folder	Dynamic Summary <input type="text"/>
CDV Group Mode	Category <input type="text"/>	CDV Limited Records	100 Records <input type="text"/>
		CDV Limited History Period	2 Years <input type="text"/>

Change Lab attributes

- ◆ Scroll down to Lab
- ◆ Change Flowsheet Size to [30]
- ◆ Extend cumulative period to [731].

Lab

Results View Mode	single	Flowsheet Size (columns)	30 <input type="text"/>
Cumulative Period (days)	180 <input type="text"/>	<small>The Flowsheet Size can be increased to a maximum of 60; however, the higher the number of columns requested, the longer it will take for the flowsheet to display.</small>	

If you use eReferral as part of your role, please configure the ‘Referring Provider Referrals’ section and / or the ‘Referring Provider Referrals On Behalf Of’ section.

**For Referring
Provider Referrals:**

- ◆ Click on the magnifying glass to bring up a Provincial Provider Registry (PPR) search.

- ◆ Enter the **First Name** and **Last Name** then click **Search**.

The search will return selections that include: **Name, Provider Type, City,** and **Status**.

- ◆ Select one of the returned selections as a referring provider, this should be your own name) and this information will populate the Referring Provider field.
- ◆ Complete the remaining fields: **Phone Number, Fax Number, Address Line 1, Address Line 2, City, Postal Code, Province**.


Please note: The values entered into these fields are not validated against the Provincial Provider Registry (PPR).

If you will also be submitting referrals on behalf of another provider, the **User On Behalf Of** field should be checked to **Yes** and you should complete the fields in that section.

**For Referring Provider
on Behalf Of:**

This section allows you to designate one or more providers that you will be able to create referrals on behalf of.

- ◆ Click **Add** to bring up a Provincial Provider Registry (PPR) search.

- ◆ Enter the **First Name** and **Last Name** then click **Search**. The search will return selections that include: **Name**, **Provider Type**, **City**, and **Status**.
 - ◆ Select one of the returned selections. This information will populate the **Referring Provider** field. This process can be repeated to select each provider you will be submitting referrals on behalf of.
 - ◆ Complete the remaining fields: **Phone Number**, **Fax Number**, **Address Line 1**, **Address Line 2**, **City**, **Postal Code**, and **Province**.
- To Show Recently Updated Referral For Section**
- ◆ The **Show Recently Updated referrals for** field is located on the right section of the screen. This dropdown field determines the length of time that a newly created or updated referral will appear in the **Recently Updated** referral list in **My Referrals**.
 - ◆ Choose from the following values: **Last 1 day / Last 2 days / Last 3 days / Last 7 days / Last 2 weeks / Last 1 month**
- Exit “My Details”**
- ◆ Click  to exit My Details.

Please note: Your homepage can be further customized to optimize your use of Alberta Netcare as it pertains to your workflow. If you would like to discuss options for configuring your homepage, please contact the eHealth Support Team at 1-855-643-8649.

**Congratulations! You have now completed your user setup.
You are ready to begin using Alberta Netcare Portal.**

APPENDIX A – USER INSTRUCTIONS FOR INSTALLING THE CITRIX RECEIVER



Alberta Netcare *Portal*



USER INSTRUCTIONS FOR INSTALLING THE CITRIX RECEIVER FOR ACCESS TO ALBERTA NETCARE

Last Updated: November 24, 2015

Alberta Netcare Portal Support
Alberta Health Services

Revision History

Revision	Change Description	Updated By	Date
1.0	<ul style="list-style-type: none">Initial Version	Jadie Tang	July 7, 2015
1.1	<ul style="list-style-type: none">Updated Version to include screen shotsInstructions on Firefox and MacAdded Troubleshooting	Clint Marcotte	October 7, 2015

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1 Prerequisites

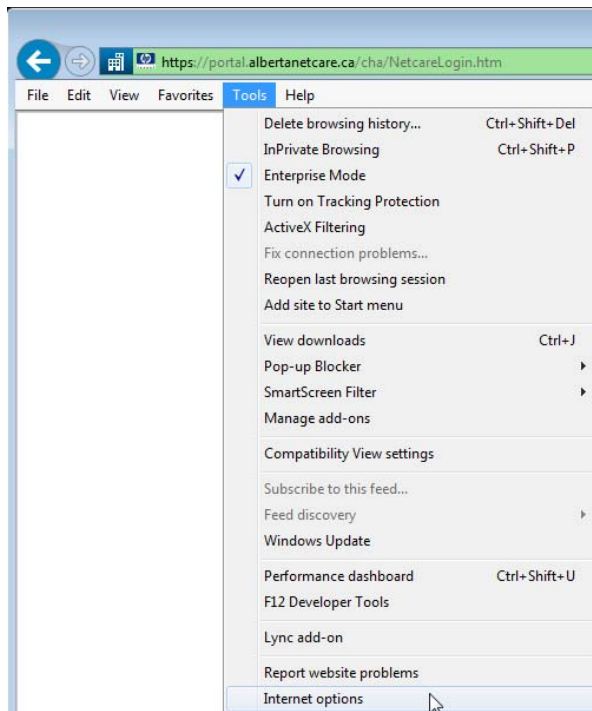
Although administrator access is not required to install the Citrix software on a workstation, it is recommended that the software be installed by an Administrator or user with Administrative access to the desktop. This will ensure that the Citrix software is available for every user using the desktop and avoid potential issues with the following update to trusted sites.

For access to Alberta Netcare Portal through the Citrix XenApp servers, the Netcare Portal site, https://*.albertanetcare.ca must be added to the **trusted site zone**. This can be done using windows group policies (if the desktop is used by more than one client that require Netcare Access) or individually by the client.

2 Adding Trusted Sites to Internet Options

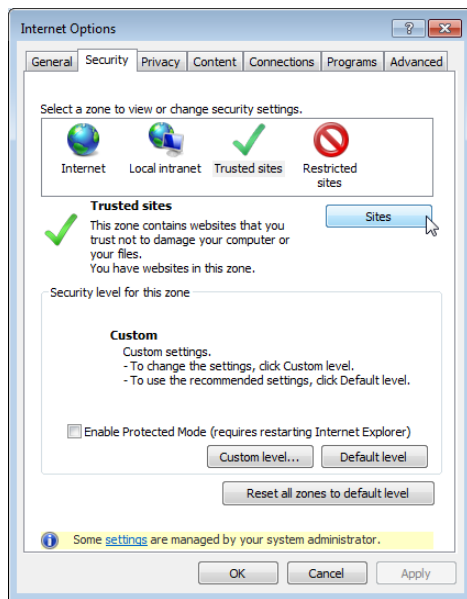
Screen shots taken with IE 11

a) Access Internet Options under Tools.

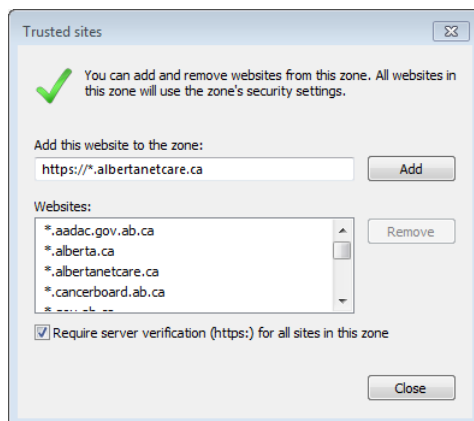


b) Click on the Security tab.

c) Click on Trusted Sites and then click on Sites Button.



d) Type https://*.albertanetcare.ca under “Add this website to the zone” and click add.



e) Click close.

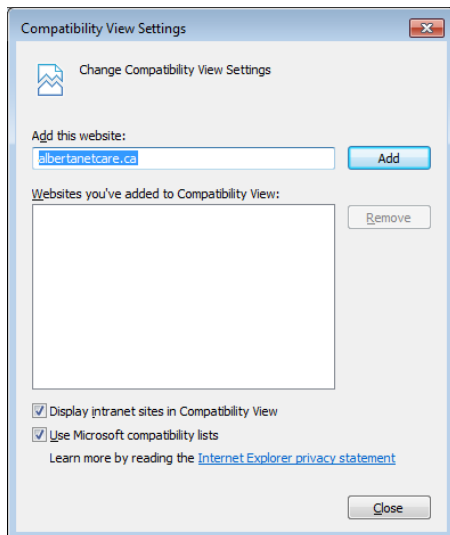
3 Adding Compatibility View

You will need to set up Compatibility View if you are using Internet Explorer 11.

- a) Open an Internet Explorer window and click on Tools.

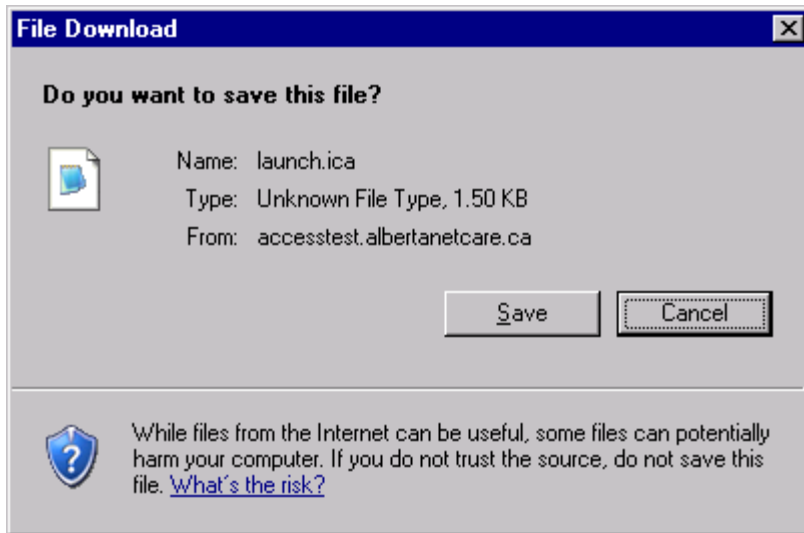


- b) In the Compatibility View Settings window, type albertanetcare.ca in the field under “Add this website”.



- c) Click “Close” button to exit the Compatibility View Settings window.

If the Citrix Receiver is not installed the following message will appear:



If this occurs, the Citrix Receiver will need to be installed using the methods in the following sections.

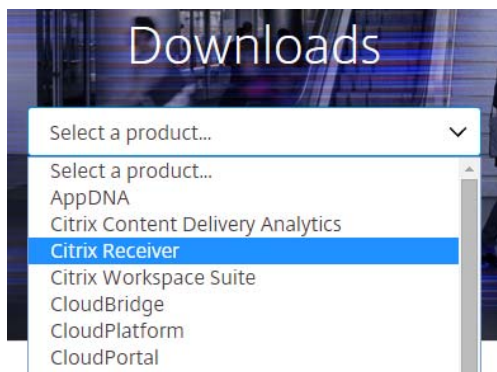
Note: Citrix should be installed by the local desktop support personnel responsible for installing new software on the workstations to ensure that local policies, procedures and support channels are followed.

4 Citrix Receiver Installation for Windows using IE 11

- a) To download and install the client software, go to the Citrix web site URL, <http://www.citrix.com>.
- b) Click on 'Downloads' from the menu at the top of the page.



- c) From the 'Downloads' page, select 'Citrix Receiver' from the 'Select a product...' drop down list.



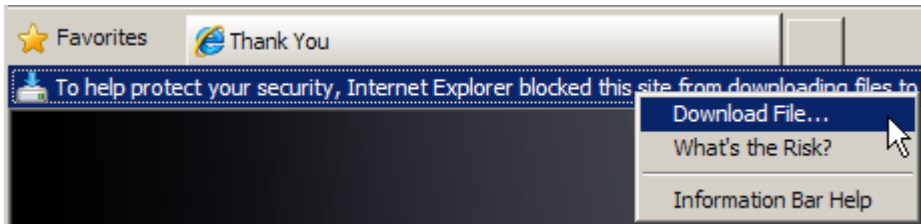
d) Click on the 'Download Receiver...' button.



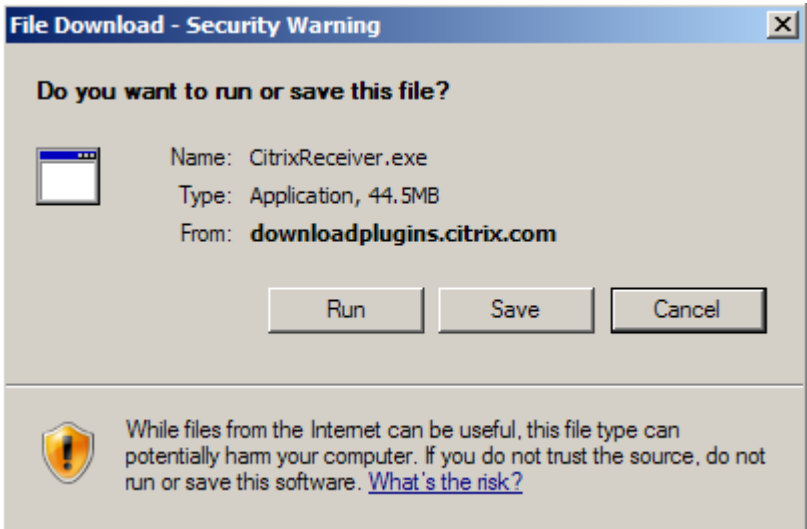
NOTE: Depending on your browser settings, the following prompt may appear.



If prompted click on the message bar and select 'Download File...'.



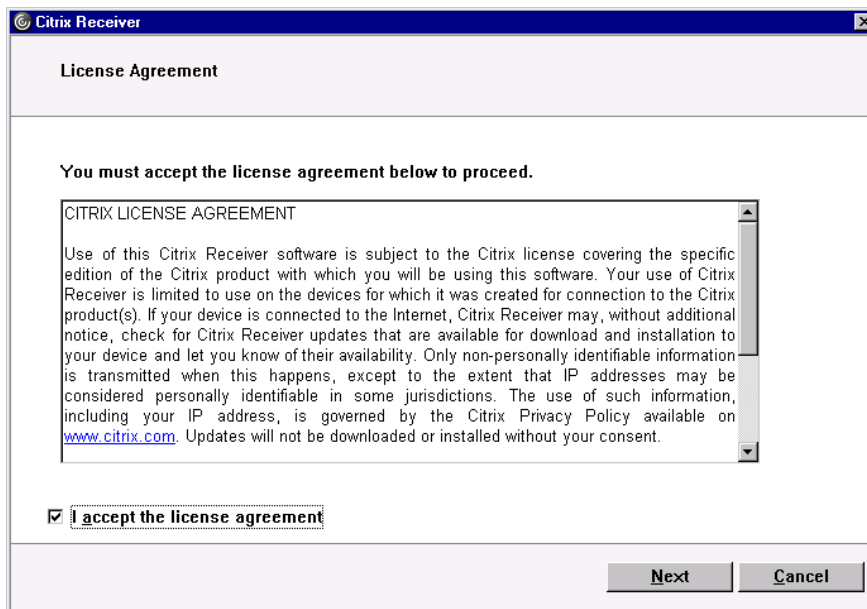
e) Click 'Run' in the pop-up window that appears.



f) To start the installation, click 'Start' in the pop-up window that appears.



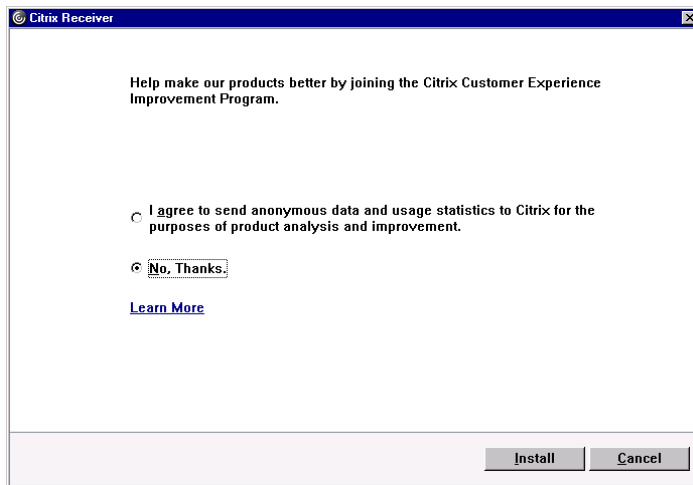
g) When prompted, accept the License Agreement and click 'Next'.



h) Do NOT check the 'Enable single sign-on' checkbox. Click 'Next'.



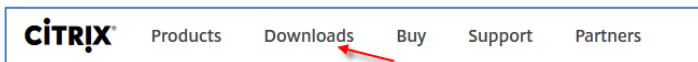
- i) Select 'No, Thanks' and click 'Install'.



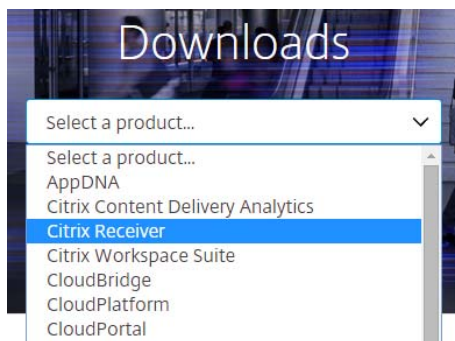
- j) When the installation has completed, click 'Finish'.

5 Citrix Receiver Installation for Windows using Firefox

- a) To download and install the client software go to the Citrix web site URL, <http://www.citrix.com>
- b) Click on 'Downloads' from the menu at the top of the page.



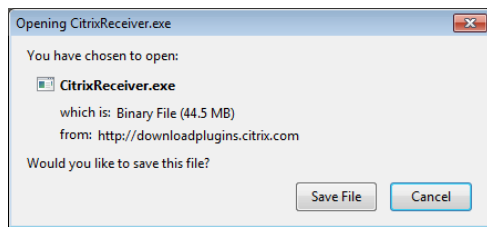
- c) From the 'Downloads' page, select 'Citrix Receiver' from the 'Select a product...' drop down list.



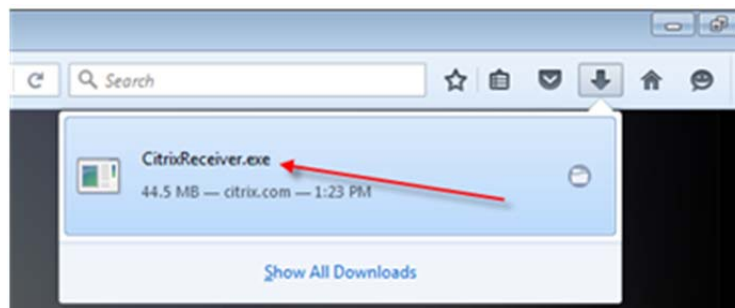
- d) Click on the 'Download Receiver...' button



e) Click 'Save File' in the pop-up window that appears



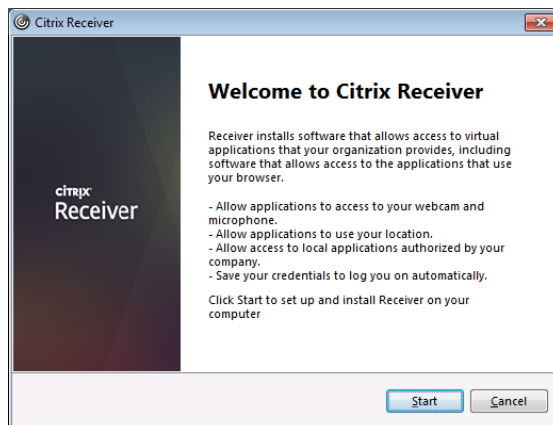
f) Click on the file in 'Downloads Menu' once it's finished saving



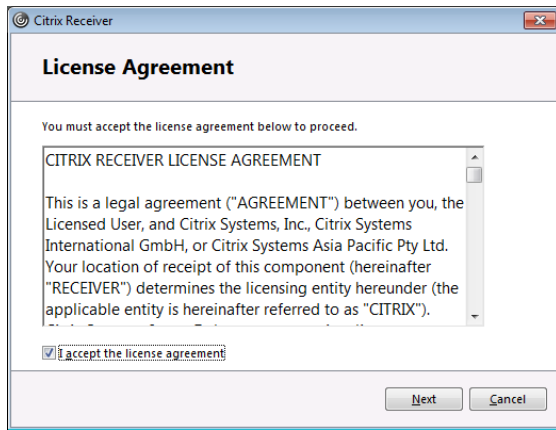
g) Click 'Yes' if prompted



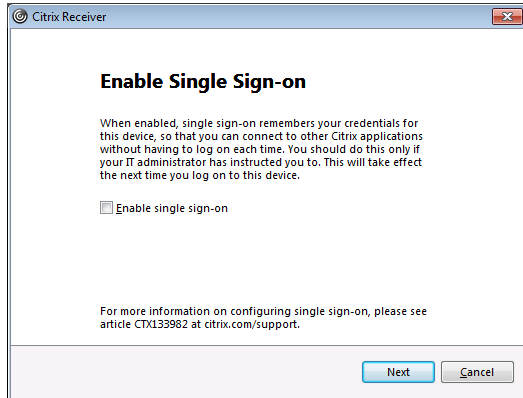
h) Click 'Start' on the 'Welcome to Citrix Receiver' pop-up window



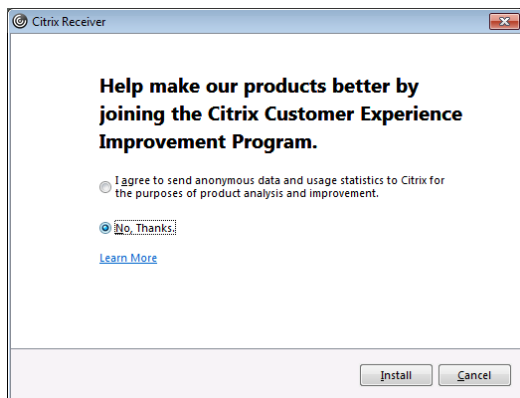
i) When prompted, accept the License Agreement and click 'Next'



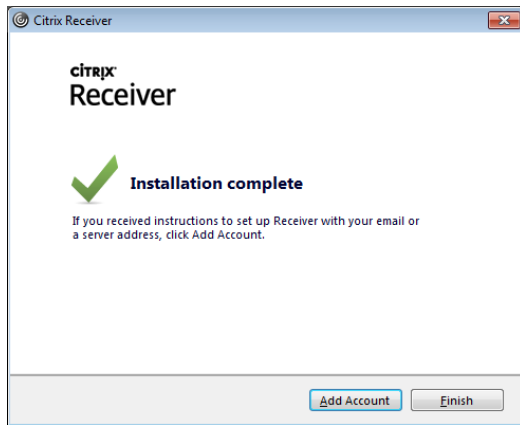
j) DO NOT check the 'Enable single sign-on' checkbox. Click 'Next'



k) Select 'No, Thanks' and click 'Install'



l) When the installation has completed, Click 'Finish'



6 Citrix Receiver Installation for Mac

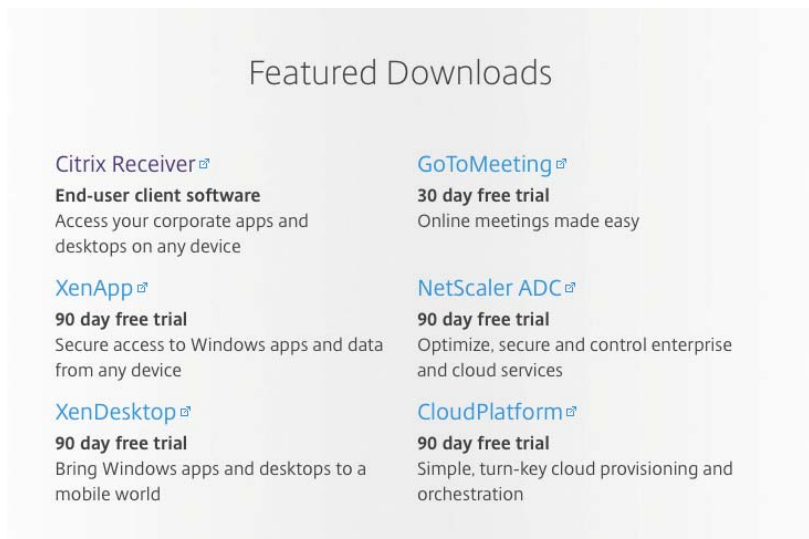
Screen shots taken with Firefox 39.0

Note: Citrix should be installed by the local desktop support personnel responsible for installing new software on the workstations to ensure that local policies, procedures and support channels are followed.

- a) To download and install the client software, go to the Citrix web site URL, <http://www.citrix.com>.
- b) Click on 'Downloads' from the menu at the top of the page.



- c) Scroll down to "Featured Downloads". Click on "Citrix Receiver".



- d) In the new window that opens click on the “Download Receiver 12 for Mac” button.

Download Receiver 12 for Mac

- e) In the new window that opens, scroll to the bottom of the page and click on the “Download File” link.

Receiver 12.0 for Mac

Release Date: Jun 30, 2015

High performance web and self-services access to virtual apps and desktops. Configure for anywhere access from your desktop or web access with Safari, Chrome or Firefox.

For Mac OS X 10.8 (32- and 64-bit), 10.9, and 10.10.3

Available in English, German, French, Spanish, Japanese and Simplified Chinese.

Ask your help desk for set-up instructions.

New features in this release

- Support for StoreFront 3.0 to deliver a centrally managed, simplified and familiar user app selection experience from Receiver for Mac including:
 - Featured app groups that logically bundle and ‘advertise’ apps to users
 - Folder view of apps provides for simplified navigation
 - Easily add and remove apps to ‘Favorites’ tab for quick access
- Interoperability with Receiver for Web on Chrome to address Google disabling of NPAPI plugin support
- Time zone fix to address time misalignment between server and local Mac client

For more information, refer to the [product documentation](#).

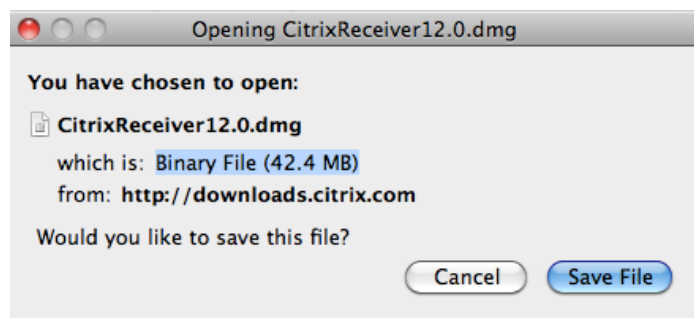
Receiver 12.0 for Mac

Jun 30, 2015

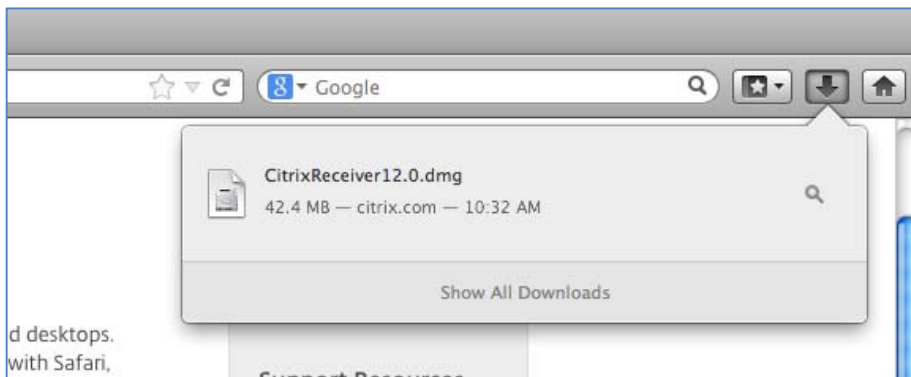
42.4MB - (.DMG) [Download File](#)

MD5: 04bebfaf27ebdf39d918f0a611325872

- f) Click on “Save File” in the pop-up box that appears.



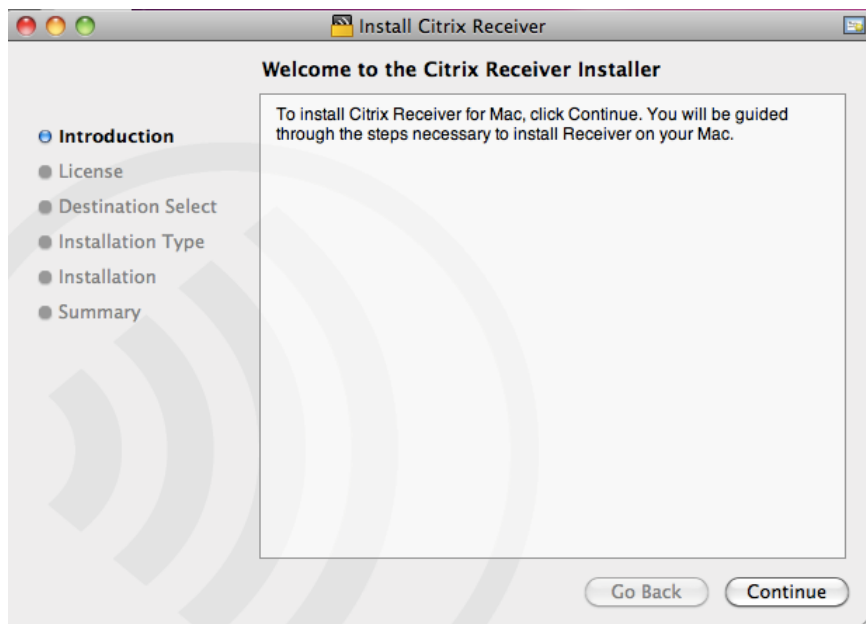
- g) After the download has completed, a pop-up will appear in the top right-hand corner displaying the name of the file that was downloaded. Click on “CitrixReceiver 12.0.dmg”.



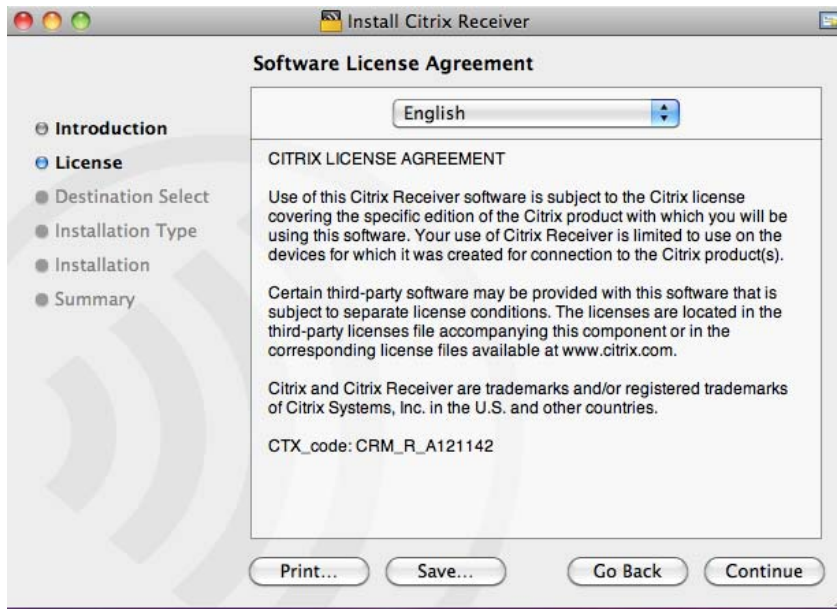
- h) Click on “Install Citrix Receiver” in the pop-up window that appears.



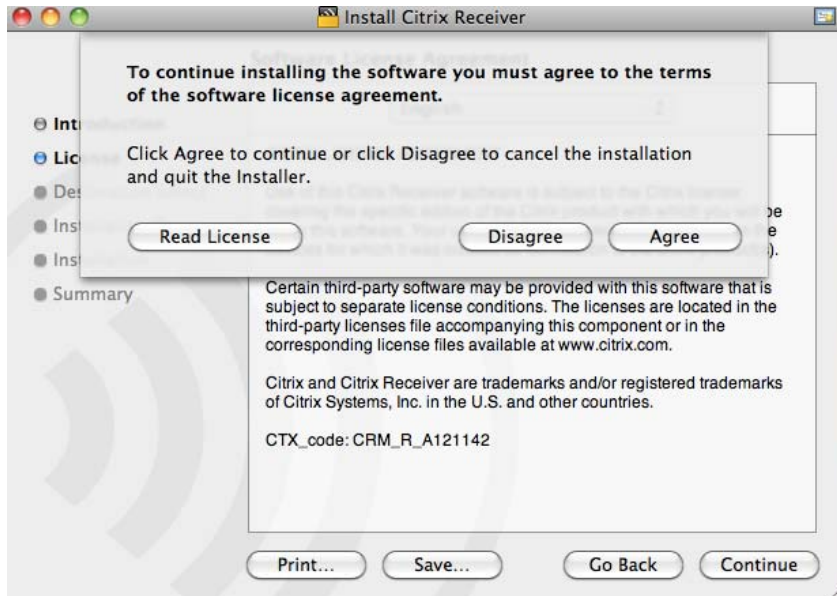
- i) Click on “Continue” after the Citrix Receiver installer has started.



j) Click on “Continue” when the Software License Agreement appears.



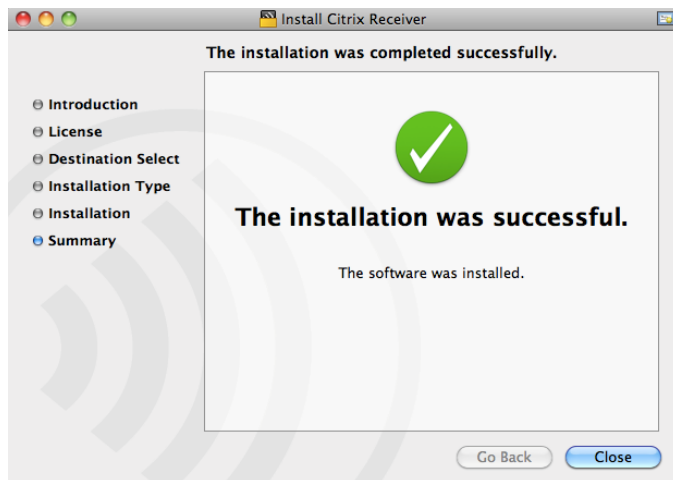
k) And click on “Agree” when prompted.



l) Click on "Install".



m) When the installation process has completed, click on the "Close" button.

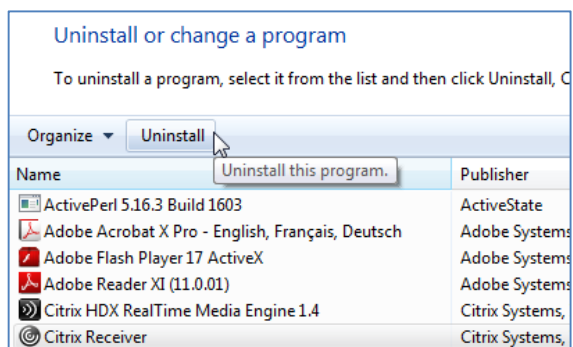


7 Troubleshooting

If after the installation of Citrix you are still having problems launching Alberta Netcare Portal. Follow these steps to remove Citrix Receiver and reinstall.

Depending on the version of Windows you are running you these steps might be different.

- a) Go to Control Panel/Programs and Features
- b) Click on Citrix Receiver and Uninstall



- c) Once it has finished uninstalling, reboot your computer
- d) Go to <http://support.citrix.com/article/CTX137494> and download the ReceiverCleanupUtility.zip file
- e) Re where you saved the file and unzip it.
- f) Run ReceiverCleanupUtility.exe
- g) After the utility has finished removing Citrix, reboot your computer again
- h) Now redo the steps to install Citrix Receiver again.

To uninstall Citrix from a MAC, please follow the same instructions listed above, up to page 15. When you reach the pop-up window giving you the option to install or uninstall, choose uninstall.