

This checklist is ideal for Super Users who no longer need detailed scripting when training new users on Alberta Netcare Portal.



Sections containing important information that **MUST** be shared with new users have been identified in **orange text**. Please ensure you cover all topics identified in these sections.

As Super User, you are the best person to determine what functionality is useful in your users' workflow. Please feel free to tailor this checklist to best meet your users' needs while still ensuring **MUST REVIEW** sections are covered with all new users.

Before you Begin

Access Alberta Netcare Portal
Remotely with a Token
<input type="checkbox"/> access.albertanetcare.ca OR <input type="checkbox"/> through EMR <p style="text-align: center;">OR</p>
From within an AHS Facility
<input type="checkbox"/> portal.albertanetcare.ca

Getting Started

Security and Privacy
<input type="checkbox"/> Never share your Alberta Netcare Portal User ID and/or password. You are responsible for all access under your security credentials.
<input type="checkbox"/> Only access health information necessary fulfill your job responsibilities, and keep this information confidential.
<input type="checkbox"/> When you have finished using Alberta Netcare Portal, be sure to click the Logout button at the top left of the Menu Bar and exit out of the internet browser.
<input type="checkbox"/> When printing information from a patient's EHR, follow the policy at your work site in the use and storage of these print-outs.

Navigating the Portal Login Page(refer to Activity 1)
<input type="checkbox"/> Review Terms of Use and Disclaimer See Script above
<input type="checkbox"/> Review Security and Confidentiality See Script above
<input type="checkbox"/> Review Need Help section and Help Desk phone numbers
<input type="checkbox"/> Point out Alberta Netcare News
<input type="checkbox"/> Point out location of Data Availability Table
<input type="checkbox"/> Point out location of Alberta Netcare Forms
<input type="checkbox"/> Point out and demo Learning Centre <ul style="list-style-type: none"> <input type="checkbox"/> Quick Reference <input type="checkbox"/> E-demo <input type="checkbox"/> User Guide <input type="checkbox"/> FAQ <input type="checkbox"/> Context Menu

Login to Training Environment (refer to Activity 2)
<input type="checkbox"/> Select user id based on permission level
<input type="checkbox"/> Password: Training4321
<input type="checkbox"/> User Name (top left)
<input type="checkbox"/> Home
<input type="checkbox"/> My details
<input type="checkbox"/> Help
<input type="checkbox"/> Log Out
<input type="checkbox"/> Common
<input type="checkbox"/> My Details
<input type="checkbox"/> Work Lists
<input type="checkbox"/> Favorites
<input type="checkbox"/> Searches
<input type="checkbox"/> eReferral
<input type="checkbox"/> Patient Lists
<input type="checkbox"/> Clinical eTools
<input type="checkbox"/> Resources
<input type="checkbox"/> Enhancement Request
<input type="checkbox"/> Messaging

Search, Open and View Electronic Health Records (Activity 3)

- Search by PHN Identifier or Search by Alternate ID
- Search by Name
- Explain Masked Chart Information
- Open a Chart
- Clinical Document Tree
- Audit Warning
- Dynamic Patient Summary
- Context menu
 - Patient Identification
 - Icons
 - View By/Look for/critical/Status
- Patient demographics
- Eligibility (PD is the source of truth- refer to activity 11)
- Print / Data Inquiry / More... buttons

Visit Medication Profile (Activity 4)

- Medication Profile
 - Emphasize limitations.** Providers must verify the completeness of the information prior to making treatment decisions.
- Modifying Search Criteria
- Summary vs Detailed
- Header (patient demographics)
- Allergies and intolerances
- Chronological prescription list

Locate, Print and View a Single Lab Result (Activity 45)

- Open a folder (Chemistry, Fluids, Other, etc.)
- Explain visual cues from within the folder (bold, abnormal, critically abnormal, strike through, italic, question mark)
- Open an individual result
- Ordering physician/facility/result/reference range
- Print button/Send button/ Data Inquiry

View and Print a Cumulative Result (Activity 5b)

- Cumulative Trending Series
 - Highlight
- Show Older/Show Newer

Locate and Graph a Result (Activity 5c)

- Graph
- Change time range
- Hover over plotted point
- Print

Locate, View and Print DI (Activity 6)

- Open DI Report
- Ordering Provider
- Facility
- Dictating Radiologist
- Print
- Image Icon within report
- Image Icon in DI folder to left of result name.

Searching for Specific Results (Activity 7)

- View by
- Look For
- Critical
- Status

Locate and View a Flowsheet (Activity 87)

- Explain Data Source
- Explain Different Reference Ranges
- Expand/Collapse categories using grey arrowhead
- Review Printing
- Graph
- Blank columns

View Event History (Activity 9)

- Refer to Data Availability Table

View Immunization History (Activity 10)

- Refer to Data Availability Table

Locate, View and Print Medication and Dispensing Information (Activity 11)

- Emphasize warning statement

Warning: Provider must verify the accuracy of patient information prior to treatment decisions.
- Demographic and allergy information
- PIN Icons
 - Active Prescriptions - Continuous
 - Active Prescriptions – Short Term
 - Active Prescriptions – Other Medications
 - Recently Active Prescriptions
 - Print Profile button
 - Multiple Rx Options button
 - Profile Reports for Alternate PHN button
 - View Rx Details tab
 - Dispensing History tab
 - Status History tab
 - Notes
- All Rx tab
 - Chronological
 - Alphabetical
 - Inactive Date
- Allergies
 - Discuss allergies
 - Manual entry for drug and non-drug allergies
- Tools:** Discuss User Preferences for Clinicians

Viewing Eligibility in Person Directory (PD) (Activity 12)

- Explain this is a shortcut to patient demographic view
- PD is the source of truth
- Searching in PD
- Viewing demographics
- Viewing ACHIP eligibility

Logout of Alberta Netcare Portal Training Environment (Activity 13)

- Logout

Log on to Production/Live ANP

- Either assist users with their initial login OR direct them to the appropriate **Setup Guide**

For Community:

http://www.albertanetcare.ca/LearningCentre/documents/SetupGuide_Community_Oct2013_v3.2.pdf

For AHS:

http://www.albertanetcare.ca/LearningCentre/documents/SetupGuide_AHS_Oct2013_v2.2.pdf

Configure EHR Clinician Home Page

- Add Search and Person Directory to Home page. If there is time
- Ask if other functionalities are needed on Home page, i.e. Recently Viewed Patients, or Patient Lists

Configure My Details

- Demo how to synchronize PIN/PD credentials.
- Identify the user's access level
- Show how to change Inactivity Time Out
- Show CDV Limited Records