Alberta Netcare

Super User Training Guide

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WELCOME

Thank you for your interest in becoming an Alberta Netcare Super User. We appreciate your commitment to ensuring new users at your location receive on-site training in a timely fashion.

This Guide is intended to ensure key learnings are passed on to every user you train. It is designed to allow you to maintain a logical flow during the sessions you run; however, you should feel free to tailor it to your specific needs. Please print this guide and make your own personal notes during your training session with the eHealth Consultant.

Alberta Netcare Super User Toolkit

There are a number of tools that can be used separately or together as you train new users at your site. As a Super User, you are in the best position to determine which resources and strategies will permit your end users to navigate Alberta Netcare confidently and comfortably.

Lesson Objectives

Following a Super User session, end users will:

Knowledge	*Skills*
◆ be aware of Privacy and Security as well as Acceptable Use policies associated with Alberta Netcare	◆ be able to locate and access information in the Alberta Netcare Learning Centre
◆ know what a masked record looks like and what it means for a record to be masked	◆ be able to open the Data Availability Table
◆ know where to locate help desk information	◆ be able to locate and open a patient record
◆ know what information is available on the Alberta Netcare Portal (ANP) login page	◆ be able to locate and open the health information they require in their role, and use it appropriately

Alberta Netcare Super User: An Alberta Netcare Portal subject matter expert who is also experienced in his or her site's work flow and how it pertains to the use of Alberta Netcare.

The resources on this page are designed to support Super Users as they train other health care providers to use Alberta Netcare.

The Super User Tool Kit includes:

Learning Materials for Super Users	
Alberta Netcare Super User Training Guide	This is an end-to-end review of Alberta Netcare complete with scripting and areas for you to record notes during your Super User Training. If you are a **NEW** Alberta Netcare user, this is the guide for you until you are comfortable training others.
Alberta Netcare Super User Training Checklist (Appendix A in the Alberta Netcare Super User Training Guide)	This resource lists the topics in the User Guide but removes content. It highlights any areas that **MUST BE REVIEWED** (i.e. security and privacy, etc.) This is a good choice if you are an **EXPERIENCED** Alberta Netcare User. If you feel comfortable navigating Alberta Netcare Portal, you can train using this checklist as the primary resource.

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Materials to Use While Training	
Video Training Sessions	If your schedule does not allow you to provide face-to-face training or if your staff work outside regular business hours, or if your team prefers video training, links to recorded training sessions may also be sent to your new users. Recordings exist for: • Alberta Netcare Portal end-to-end demo of key functionality • Pharmaceutical Information Network (PIN), Person Directory (PD) and Patients Lists - demos on what training resources are available and how to access them. Key security and privacy information is highlighted in each of the recordings.
End User Self-Study Activity	This is not meant to be a test, but rather an activity to ensure new users understand the most important privacy and security awareness concepts and can navigate Alberta Netcare confidently.
Alberta Netcare Learning Centre	You will find a variety of learning materials here to help you get the most out of Alberta Netcare. There is a navigation tab for each Alberta Netcare key topic or application. When you click on a key topic or application tab, you will get an introduction on the landing page and see the different learning material types available listed on the left navigation menu.
Learn by Role	This section of the Alberta Netcare learning center allows you or your end users to view all of the training materials that are relevant to their Alberta Netcare Portal User access Role. Choose your Alberta Netcare Portal (ANP) User Role from the expandable list and find information on specific components that you have access to. This will help you narrow down what Alberta Netcare topics may need to be covered in your training session or what you may want to review to refresh your ANP knowledge as it relates to your day to day work activities.

If you have questions at any time, please don't hesitate to reach out to our **eHealth Support Team** at **1-855-643-8649**. We are happy to help.

Instructions

1. Use this guide during your Super User Training Session to highlight key areas and take notes. This is your primary resource for training your staff.

2. Any font displayed in italics is a script you can follow when training your staff until you are familiar with the language of Alberta Netcare. You should perform any action described in the text whether or not it is in *italic* font.

3. Feel free to take notes or highlight key points directly in this guide for your reference going forward.

Accessing the Training Environment

1. From the *ANP Training Environment* login page, click on the *Learning Centre* link in the "Need Help?" section. The Learning Centre can remain open while you work in the Training Environment. This will allow you to access the information in the Learning Centre at any time for additional information.

2. Start with Navigating the Alberta Netcare Portal login page (page 6) followed by Activity 1. The Training Environment is available 24/7, so you may complete these activities on your own schedule and at your own pace.

> If you have trouble accessing the Training Environment, or have a question about any of the learning activities, call the **eHealth Support Line** at **1-855-643-8649**.

3. Read the following Security and Confidentiality information before you begin.

Security and Confidentiality:

> The importance of this section should be emphasized during all training sessions.

Only authorized users may access a person's medical and demographic data. EHR access is based on your user role and profession. Access permissions and other security credentials are set up to ensure you have enough information available for you to do your job, and that information is accessed only on a need to know basis. Be aware that Alberta Netcare Portal access is monitored and audited on a regular basis, as well as 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 application laws.

The *Terms of Use and Disclaimer* states that Alberta Netcare Portal is for the use of authorized users only. Unauthorized access to Alberta Netcare Portal is prohibited and may result in disciplinary action.

Restrictions of Use:

- 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.

- 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 $100,000.

- You agree that you will not use the Information for commercial purposes.

Disclaimer and Limitation of Liability:

- You understand that Alberta Netcare, and the Information accessible therein, are provided by Alberta Health (AH) 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. AH 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:

- You are aware that AH 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.

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Best Practices

1. Never share your Alberta Netcare Portal User ID and/or password. You are responsible for all access and activity made under your User ID.

2. Only access health information necessary fulfill your job responsibilities, and keep this information confidential.

3. When you have finished using Alberta Netcare Portal, be sure to logout and exit out of the internet browser.

4. When printing information from a patient's EHR, follow the policy at your work site for the use and storage of these print-outs.

Tips for Using Alberta Netcare Portal

◆ *Single-click* everything – menus, buttons and icons.

◆ Let pages *fully load* before trying to select a patient or complete other tasks.

◆ Look for a progress bar at the bottom of the screen. This provides an indication of when the results will be displayed.

◆ Do not use the Backward and Forward buttons on the Internet Task bar. Always use the back button inside of Alberta Netcare Portal.

◆ Do not exit Alberta Netcare Portal using the exit button (X) on the Internet task bar.

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Activity 1: Navigating the Alberta Netcare Portal Login Page

①	**Terms of Use and Disclaimer:** Review *Terms of Use and Disclaimer*. By accessing Alberta Netcare users agree to be bound by the *Terms of Use and Disclaimer* and to comply with all applicable legislation.
②	**Security & Confidentiality:** Only authorized users can access a person's medical and demographic data. EHR access is based on your user role and profession. Access permissions and other security credentials are set up to ensure you have enough information available for you to do your job. Information should only be accessed on a need to know basis.
③	**Need Help?:** Provides telephone numbers for *Help Desks*, as well as a link to the Learning Centre.
④	**Caution:** Review the content in the *Caution* box as it is relevant to use of Alberta Netcare Portal and can change without notice.
⑤	**Alberta Netcare Portal News:** Used to communicate outages, release notes and announcements. It is important to check this area frequently for the latest updates.
⑥	**Training Resources:** Difference between the Training Environment and Learning Centre • *Learning Centre* is a library of current learning materials. Open the Learning Centre first. It will remain open as you work either in the Live Environment or Training Environment. • The *Training Environment* is a place to practice with simulated patient data.
⑦	**Data Availability Table:** Location of the most current *Data Availability Table*.
⑧	**Administration Forms:** *Alberta Netcare Forms* provides access to forms such as the Netcare User Registration eForm, Access Administrator Form, and the form used to apply/rescind patient masks.

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Activity 2: Log in to the Alberta Netcare Portal Training Environment

> **Assumption:** Setup and configuration activities have already taken place. Please refer to the Setup Guide for either a Community user or an Alberta Health Services (AHS) user for step by step directions for these activities. If you have difficulty, contact the eHealth Support Line at 1-855-643-8649.

The Alberta Netcare Portal Training Environment looks and functions like the "real" Alberta Netcare Portal. The only difference is that you are working with fictitious data. It provides a safe and secure environment for you to learn and practice viewing or updating Electronic Health Record data.

These learning activities are designed around fictitious patients. Any representation to a living person is purely coincidental.

Notes:

1. Access the Alberta Netcare Portal Training Environment login page.

   ◆ From the Alberta Netcare Portal login page, click the *Training Environment* link. *It opens the Training Environment login page.*

2. Log in to the Alberta Netcare Portal Training Environment.

   ◆ In the How to Log On section of the login page, choose a Permission level and User ID to simulate the view and functionality the new user will have in the Alberta Netcare Portal Live environment.

   ◆ Type the selected *User ID* in the User ID field in the upper left corner (*all lowercase and no spaces*).

   ◆ Type *Training4321* in the Password field (no spaces).

   ◆ Click *Login*.

     – *If you are registered for Alberta Netcare Portal access from more than one facility, you will see a Facility Selection dialog box. Select the facility that you are currently working at. If you only work at one facility, you will not see the Facility Selection box.*

   ◆ *The Alberta Netcare Portal Home page opens. **Note** that this page has been configured for patient searching.*

   ◆ Point out icons in the top left quadrant:

     – *Notice the Training ID. When you login to the live ANP environment, your name will be displayed instead of the Training ID. Everything you view is tracked and monitored.*

     – *Notice the 🏠 icon. This is the home button which takes you back to your Home page. You should go to your Home page to conduct a new patient search.*

     – *Notice the ⚙ icon. This is used to set your user preferences. You can set these preferences when you login to your live account.*

     – *Notice the ❓ icon. This is the Help button and will bring up the most relevant information when you click it.*

     – *Notice the ⏻ Logout button. This must be used when you want to log out of your session completely. Sessions can stay open when users have closed the browser without logging out, possibly allowing others to access ANP under your credentials.*

     – *Notice the Menu bar along the left side of the screen (My Details, Favourites, Searches, Patient Lists, Help, Messaging, etc). We'll come back to this a little later.*

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Activity 3: Search, Open and View Electronic Health Records

Search

Practice searching for George Simpson, Edward Black or Jim Heart.

1. Search using a PHN/ULI Identifier

Notes:

    ◆ *The "best practice" search is by PHN/ULI. This will likely result in a "hit" or "best match." Type the **PHN** in the* **Identifier** *field. You do not need to include the hyphen "-"*

        a. **George Simpson**: *425346114*

        b. **Edward Black**: *101249034*

        c. **Jim Heart**: *100068677*

    ◆ *Click* **Search** *or press Enter to display the Search Results*

    ◆ *Click* **Clear** *to try another method of searching*

    ◆ *An* **Alternate ID** *can also be used to search, if the person has accessed the Alberta Health Care system with an Alternate ID. Alberta Netcare Portal does not access the person's home province to retrieve information.*

2. *Preferred search method using a Last/First name, DOB and Gender*

3. Type [**Simpson**] in the Last Name field and [**George**] in the First Name field

4. Type Date of Birth [**22-Jun-1930**].

> *You do not need to use Initial Caps, but you* ***must*** *include both names. When a ULI is not available, First name, Last name and Date of Birth will most likely result in a match.*

5. Choose Sex [**Male**].

6. Click *Search* to display the Search Results.

Basic demographic information is displayed for each record found.

7. *If the search results returned a patient you were not searching for, click* **Clear** *to search again.*

8. *If the correct George has been found, you can click anywhere on the row to open his Electronic Health Record (EHR).*

If a person has chosen to have their Electronic Health Record masked, an Alberta Netcare Masking icon 🔒➕ appears to the left of the person's name. To unmask the record, click anywhere on the record and follow the directions provided.

	PHN / ULI	Name
🔒	10010-6114	MCDONALD, Mary

Open

Open a patient's EHR.

1. Open the EHR file
*Open [**George Simpson's**] EHR file by clicking anywhere on the row of the patient.*

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View

View the EHR file.

When you open a patient's EHR, it navigates to the Clinical Document Viewer (CDV). The default view consists of:

①   The **Menu Bar** on the far left (My Details, Searches, Patient Lists, Help, Messaging, etc).

②   The **Clinical Document Tree** includes all available clinical documents including lab results, diagnostic imaging, images and other transcribed documents. Click on the triangle to the left of each folder name to view additional information for each category.

> It should be noted that the Clinical Document Tree defaults to show 100 records per folder or two years worth of information. This can be adjusted to include up to 500 records per folder or 5 years worth of information by changing preferences in My Details. Some users opt to select the All Documents icon located immediately to the right of the Limited Documents icon in the Context Menu, which provides a view of all results in ANP for that patient.

③   **Dynamic Patient Summary** on the far right side (Patient Demographics and Audit Warning windowlets display by default).

④   The **Context Menu** allows you to clearly identify the currently selected patient, add patients to one or more custom Worklists, choose another patient from the list using the arrows or drop-down list and choose an icon to view additional patient information.

    A.   **Patient Identification:** Patient name, PHN and navigational arrows.

    B.   **Icons** provide access to other areas of the EHR (refer to Icon chart on Page 10).

    C.   **View By/Look For/Critical/Status:** Provides different methods of filtering the reports.

Notes:

Audit Warning Windowlet

> Alberta Netcare Portal access is monitored and audited on a regular basis, as well as at the request of a patient/physician/manager.

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Context Menu Icon Chart

Limited Documents — *Displays a limited number of patient records (default is 100 records per category OR last 2 years – whichever is less).*

All Documents — *Displays all patient records.*

AHS-Edm Flows — *Displays all numeric lab results, over a period of time and in table format, from AHS-Edmonton.*

AHS-Edm Acute Care Flows — *Displays 39 predefined numeric lab results, over a period of time and in table format, from AHS-Edmonton.*

AHS-Cal Flows — *Displays lab data from AHS-Calgary.*

AHS-Rural Flows — *Displays lab data from AHS-South, AHS-Central and AHS-North.*

Patient Event History — *Lists encounters with AHS-Edmonton facilities.*

Immunization History — *Lists immunization history from AHS-Edmonton's Community Health System.*

Pharmaceutical Information Network (PIN) — *Displays prescription, dispense and allergy/intolerance information on patients throughout Alberta.*

Create Referrals — *Displays the Request for Service screen to create a referral, and lists all referrals; Drafts, In Progress and Completed/Cancelled/Declined.*

View Referral — *Displays all referrals; Drafts, In Progress and Completed/Cancelled/Declined.*

Patient Demographics

The Patient Demographics windowlet displays first and last name, age, address and phone numbers.

1. *A person's eligibility for Alberta Health Care Insurance Plan (AHCIP) coverage is identified by the* **Eligibility Start Date**.

   ◆ *If you want to view the person's eligibility history, you will need to access this information through Person Directory, which will be introduced later in the session. (Refer to **Activity 11** for instructions on using Person Directory.)*

2. **Address (Primary)** – *The demographic information displayed in Alberta Netcare Portal is accessed from the AHS Client Registry.*

3. **AH Address (Mailing)** - *Address currently on file with Alberta Health (AH).*

Notes:

Patient Demographics

BLACK, Edward

Date Of Birth	16-Jan-1912	Home Phone	(780)555-1234
Age	103 years	Work Phone	(780)555-4321
Sex	M	Cell/Alternate Phone	
Eligibility Start Date	16-Mar-2013 ⬅ ①		
	Note: Future-dated and blank eligibility start dates should be confirmed in Person Directory.		
Address (Primary)	9326-108 Avenue, Edmonton, AB, Can, T5H 0Z9 ⬅ ②		
AH Address (Mailing)	9326-108 A...........monton, AB, Can, T5H 0Z9 ⬅ ③		

Print   Data Inquiry   More...

Printing/Data Inquiry/More

◆   *Click* **Print** *to view and print a hard copy.*

◆   *Click* **Data Inquiry** **if you** *suspect a patient identity mix-up, duplicate record, or if a result should be available in the system, but is not displaying.*

> *The* **Data Inquiry** *button should not be used to report demographic or medication errors.* *For more information on the Data Inquiry Function, please visit the Learning Centre.*

◆   *Click* **More...** *to view data not available in the basic Patient Demographic windowlet.*

Follow the **Policies, Procedures and Guidelines** *set out for your worksite when you print any patient-related documentation.*

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Activity 4: View the Medication Profile

*The **Medication Profile** contains information on a patient's allergies, intolerances, medications and dispenses from outpatient pharmacies across Alberta. The record is accurate but may not be complete. Demographic information between the submitting pharmacy and Alberta Health must match in order to for the record to be accepted, and inpatient medications dispensed in hospitals are not included in the medication profile. **Providers must verify the accuracy and completeness of a patient's information prior to making treatment decisions.***

Viewing a Medication Profile

Notes:

1. Click the *Medication Profile* link on the **Clinical Document Tree**.

2. *Search Criteria automatically defaults to a 1 month Summary Report. Users can modify the date range as well as the type of report based on their needs. Summary Reports show the most recent dispenses while Detailed Reports show all dispenses within a selected timeframe. Users must click Select once they've modified the Medication Profile Search in order for the new information to populate.*

   If the patient has more than one Unique Lifetime Identifier (ULI), the list of ULIs will be displayed in the Search Criteria section so that a ULI can be selected prior to running the Medication Profile report request.

   If the Medication Profile for a patient without a ULI is accessed, an error message will be displayed which reads:

   > *As this patient does not have a ULI, no medication information can be retrieved from PIN.*

   With the warning message below in the search criteria screen:

   > *Please note that performance may be affected if the patient has a large number of medication dispenses.*

3. *Search Results display the Medication Profile based on the search criteria. This includes:*

   - *Header showing patient demographics and the provider warning.*
   - *Allergy information that displays drug/non-drug, allergy and intolerance information. This information is entered manually by physicians and pharmacists into PIN, or into their EMR. Providers must verify the accuracy of the record prior to making treatment decisions.*
   - *Chronological view of prescriptions and dispenses.*

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Activity 5a: Locate, View and Print a Single Lab Result

Locate, View and Print

Clinical Document Identification:

- A **Bold** document name indicates you have NOT viewed this document.

- A **red** document name *indicates that one or more numerical results fall outside the normal range.*

- A **red C** indicates that one or more numerical results fall **critically** outside the normal range.

- A test result with a ~~strikethrough~~ format means that a result has been removed from view, either by the data source (cancelled) or by the Data Integrity Unit (mismatch).

- An italic result means only an interim or pending test result is available.

- A question mark (**?**) means the date of birth and/or gender on the test results DO NOT MATCH the patient's demographic data in the EHR.

Locate, view and print a single clinical document.

a. *Click the* Clinical Documents *(All) icon in the* **Context Menu** *at the top of the Alberta Netcare Portal window to list all available patient records.*

   Each drop-down list has a name (Chemistry, Blood Bank, etc.) If the folder name is **Bold** *you have NOT viewed one or more documents in the folder. The following icon indicates the type of result in each folder.*

	Numeric Result		Text Result		Diagnostic Imaging		Provincial Laboratory

b. Click the Chemistry folder in the **Clinical Document Tree**.

c. *Locate the* 17-Jan-14 Creatinine *lab result. The latest or most recent results are at the top of the listing, so you may need to scroll down. The result shows:*

1. *It was ordered by Dr. Chris Poinin.*

2. *The test was done at DKM on January 17, 2014.*

3. *Mr. Simpson's result is* ***167** (the ***** *identified it is* **abnormal**; if it is was **critically abnormal** it would be preceded by a **red C** in the tree and would have two asterisks (******) next to the result).

4. *The range of Normal is between* 45 – 125 umol/L.

5. *Abnormality is* High.

d. *Click* Print *at the top right of the screen to print the selected result.*

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Worksite Print Policies

Follow the Policies, Procedures and Guidelines set out at the site you work at when you print any documents.

Send: Used to attach this result to an internal email system to another person who accesses Alberta Netcare Portal. Ensure that the recipient has the correct permission level to view the record.

Note: This is not a regular email. It is a special message sent from one ANP user to another.

Data Inquiry: Used to send a message to the Data Integrity Unit, alerting them that there is misinformation on a particular result. An email text box will appear, allowing you to type a message.

Activity 5b: View and Print a Cumulative Result

NOTE: Only results from the same single data source (point of origin) of the selected test result are displayed.

View and Print Trending Series

	Notes:
*From the **Lab Result** screen, click the **View Cumulative Results** link to view the trend for these Creatinine levels.*	

*The **highlighted** column indicates the lab result that was originally selected.*

Note that each column is numbered. These are the number of results in the patient's EHR. For example, George Simpson has 50 Creatinine results.

Note: The Show Older and Show Newer buttons will only be functional if there are more historical or recent results to be viewed.

*The number of columns defaults to 5 columns of test results. This setting can be adjusted in **My Details***

1. *Use the blue Show Older or Show Newer links to view historical or more recent results.*

2. *Click **Print** to print the selected result.*

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Activity 5c: Locate and Graph Lab Results

View and Print a Chart

1. Select the Check box beside the **Creatinine** lab result.

2. Click the **Graph** button.

3. To change the **time range** to narrow or widen the result window, click and drag your mouse to highlight the time period or results desired on the top graph. The graph will automatically update.

4. Hover your mouse over each plotted point to view the lab information.

5. Click another item from the **Clinical Document Tree** or the test result link at the top of the graph page to return to the **Cumulative Results** screen.

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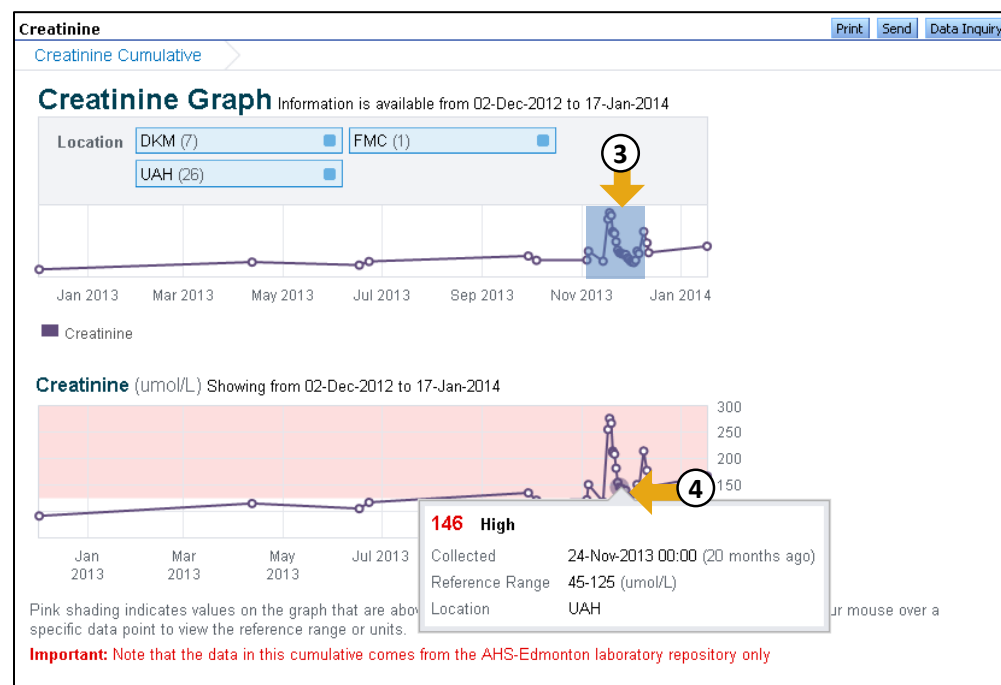
Activity 6: Locate, View and Print a Diagnostic Image (DI) Result
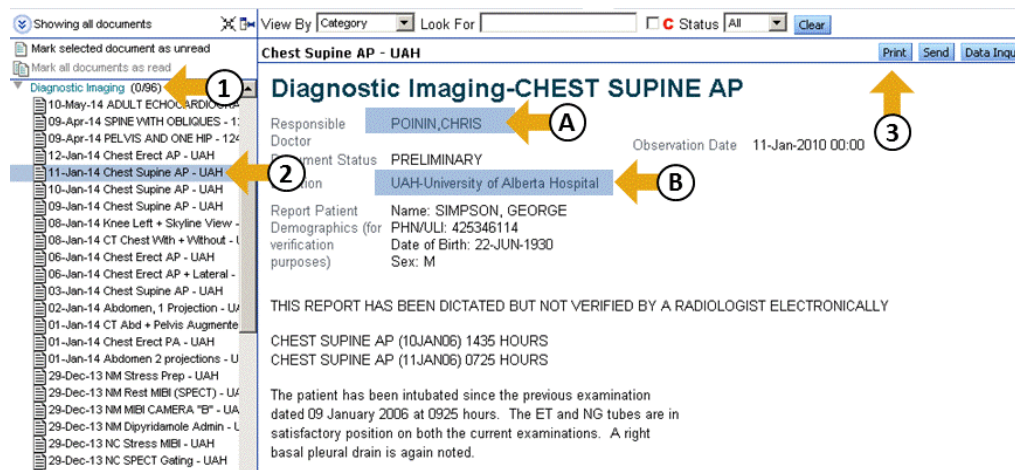
View and Print a DI Result

1. Click the **Diagnostic Imaging** *folder in the* ***Clinical Document Tree****.*

2. *Click the* **11-Jan-14 Chest Supine AP – UAH** *result. Note the following information:*

   A. *Ordering provider*

   B. *Test was performed at University of Alberta Hospital.*

   If you see a [image] *icon next to the test result, it means there is Diagnostic Image available. If the X icon appears to the left of the report in the dropdown Diagnostic Imaging category, it indicates the image is available but that it has not yet been read by the radiologist*

3. *Click* **Print** *to print the report.*

Notes:

Activity 7: Searching for Specific Results

In this example you will see ways to look for specific results by using the filtering tools.

Using Filters to Search for Specific Results

1. *Click the* **View By** *dropdown arrow to review a list of viewing options. Leave View By as* **Category***.*

   Hint: Changing the filter can be a useful tool to determine whether a result is in ANP or not. If a user is unsure which category houses a particular result, but knows the name of the ordering physician or the date a particular test was done, the result can be found by changing the filter.

2. *Leave the* **Look For** *field blank. If you use this field, you will notice a filter of possible "hits" until the lab result is found.*

   Caution: if no "hits" are found it does not necessarily mean the result is not in the system. Try searching using the month the test was run or in more general language. E.g. Search using 'chest' vs 'chest x-ray'

3. *Select the* **Critical** *check box to limit the search to critical results only.*

4. *Click* **Status** *dropdown to review additional document statuses. Leave the Status as* **All***.*

5. *Results: As you select filter criteria, the display in the* **Clinical Document Tree** *will show the list of results that meet the criteria.*

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Activity 8: Locate and View a Flowsheet

Unlike the **Clinical Documents Tree** which allows users to view lab results individually, flowsheets display a history of all numeric lab results carried out for the patient based on the geographic location of the testing.

Flowsheet functions are available in AHS-Edmonton Lab flowsheet, AHS-Edmonton Acute Care flowsheet, AHS-Calgary Lab flowsheet and AHS-Rural Lab flowsheet found within the **Context Menu**. The AHS-Edmonton Acute Care flowsheet is a set of 39 pre-determined tests displayed over a selected period of time. This type of flowsheet does NOT organize test results into Categories.

Locate and View a Flowsheet

Hover your mouse over each flowsheet icon in the context menu. A tool-tip indicates which flowsheet it corresponds to.	Notes:

Click the **Flowsheet** icon that represents **AHS-Edmonton Lab Flowsheet** in the **Context Menu**.

To view results either:

1. Use the **scroll bar** on the right side to scroll up and down.

2. Collapse or expand groups by clicking on the **grey arrowhead**.

3. Print this group of data by clicking on the **Print** button at the top of the screen.

4. To create a graph, select one or more of the **Test Result checkboxes**.

5. Scroll down to the bottom of the page and click **Graph**.

A **"blank" column or row** indicates that there may be a textual result, not a numeric result for that specific column date.

A **Units** or **Reference Range Differs** message warns you when the results displayed as a flowsheet have been processed by different facilities using different reference ranges.

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Activity 9: View Event History

The **Patient Event History** summarizes a patient's contact with an AHS zone's health facilities. The availability of these histories depends on the AHS zone. An up-to-date Data Availability Table can be viewed on Alberta Netcare Portal's login page to determine which Event Histories are being uploaded to ANP.

Viewing a Patient's Event History

1. Click the **Patient Event History** icon on the **Context Menu**.

2. The results displayed summarize a patient's contact with an AHS zone's health facilities.

3. Click **Print** to print the event history.

4. Click **Data Inquiry** to report suspected problems with the data being viewed. An e-mail with the attached record is sent to the Data Integrity Unit.

Notes:

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Activity 10: View Immunization History

The Immunization History summarizes a patient's immunization history. Only those immunization records with an attached Provincial Health Number (PHN) are displayed. An up-to-date Data Availability Table can be viewed on Alberta Netcare Portal's login page to determine what immunization data is being uploaded to ANP.

Viewing a Patient's Immunization History

		Notes:
1.	*Click the* **Immunization History** *icon on the* **Context Menu**.	
2.	*The results displayed are for the immunization history from the AHS-Edmonton Community Health system.*	
	Note: *this is for Public Health only – not independent clinics.*	
	*If the immunization was performed when the patient was a child, it is highlighted in **blue**.*	
	*If the immunization was performed when the patient was an adult, it is highlighted in **green**.*	
3.	*Click **Print** to print the immunization history.*	
4.	**Data Inquiry** *is used to report suspected problems with the data being viewed. An e-mail with the attached record is sent to the Data Integrity Unit.*	

42534-6114 SIMPSON, George (M/85 years)   26-Jul, 17:1

Print   Data Inquiry
①

Immunization patient demographics (for verification purposes)

Name: SIMPSON , GEORGE
PHN/ULI: 425346114
Birthdate: 22-Jun-1906
Sex: M

② ③ ④

Note: Data on the list below may be incomplete as it may only display the most recent immunizations administered at an AHS-Edmonton Public Health Centre.

Immunization Date	Vaccine Description	Dose Number	Adverse Reaction	
08-Nov-1995	Tetanus/Diphtheria	6	No	

Activity 11: Locate, View and Print Medication and Dispensing Information

The Pharmaceutical Information Network (PIN) provides access to detailed information about a patient's active and historical medications, as well as community pharmacy dispense information. Medication information is either generated directly within PIN by a prescriber, uploaded by batch file, or made available from the real-time integration (RTI) environment with a physician office or community pharmacy. All pharmacies in Alberta submit medication information to PIN regularly.

Search for Edward Black

1. In Alberta Netcare Portal, perform a search for Edward Black (PHN **10124-9034)**. 2. Open the patient's EHR	Notes:

Review Demographic and Allergy Information

1. *Click the* **PIN** 🔴 *icon on the* **Context Menu**. *Provider must verify the accuracy of this patient's information prior to treatment decisions.* **Allergy information** *is entered manually and directly into PIN.*	Notes:

PIN Icons

✚	Blue Cross	📄	Triplicate
C	Cancer Board	OM	Other Medications entered by Pharmacy Batch
▼	Contraindication	ℹ	Other Medications that are entered directly into PIN.
℞	Pharmacy Batch		

Notes:

Categories

Prescriptions are designated as **Continuous** *or* **Short-Term** *display if a physician or pharmacist has used PIN to prescribe the specific medication, or if the medications have been received through real-time integration (RTI).* *The category* **Other Medications** *displays information received from community pharmacies, informational prescriptions as well as non-prescription information. The default view will display the chronological list of associated dispenses.* **Recently Active Prescriptions** *displays the prescriptions that have expired and have been removed from the Continuous, Short Term and Other categories.* *The* **All Rx** *tab lists prescriptions in the three sort orders: Chronological Order, Alphabetical Order and by Inactive Date.*	Notes:

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View medication and dispensing information in PIN

Prescription information is displayed in the details panel on the bottom right.	Notes:

All Rx

Click the **All Rx** tab to view prescriptions by **Chronological**, **Alphabetical** or **Inactive Date** order.	Notes:

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Screen 1 Activity

	Notes:
Hover over the **Aspirin 81 MG Tablet** *prescription to view its tool-tip.* *Click the* **Aspirin 81 MG Tablet** *prescription to view its Rx Details and dispensing information (See Screen 2 Activity).* 	

Screen 2 Activity
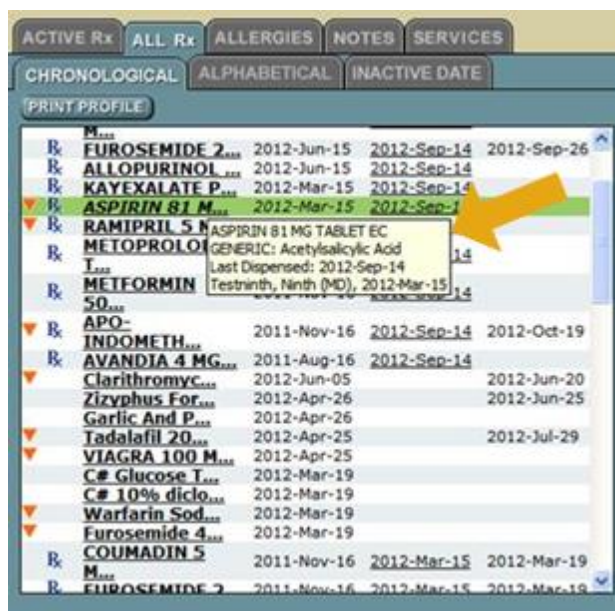
	Notes:
The **Rx Details** *view provides the prescriber entered information:* ◆ *Drug name, dose, form and route.* ◆ *Administration instructions (directions and additional instructions).* ◆ *Name of prescribing physician and his/her phone number.* ◆ *Pharmacy where the prescription was last filled.* 	

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Screen 3 Activity

		Notes:
1.	***Other Medications*. The Rx Details view represents the first dispense information along with the most recent dispense information.**	
2.	The **Dispensing History** view represents the most recent dispensing information. The default view is chronological. You can also view by Pharmacy.	
	A. Click **Dispensing History** – *defaults to Chronological View.*	
	B. Click on any medication in the **Other Medication** category or on ***Filled*** on the ***Active Rx*** tab, to go to the default Chronological Dispensing History view.	

> **Note:** *If medication is dispensed at a new dose, it will be displayed as a separate event.*
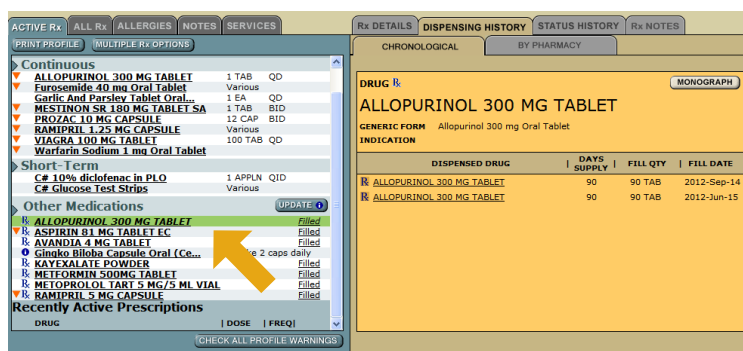
Print a PIN Profile

		Notes:
1.	Locate the [PRINT PROFILE] button on the left side of the screen.	

> *If the screen resolution is 1024 x 768, you will see both buttons.*
>
> *If the screen resolution is 800x600, you will only see the Print Profile button.*
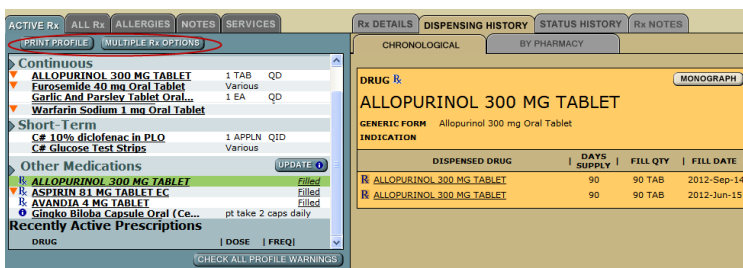
2. Click the [PRINT PROFILE] button.

3. Choose your printing parameters:

   A. Reverse Chronological Order

   - Summary Report

   - Detail Report

   B. Alphabetical Order

   - Summary Report

   - Detail Report

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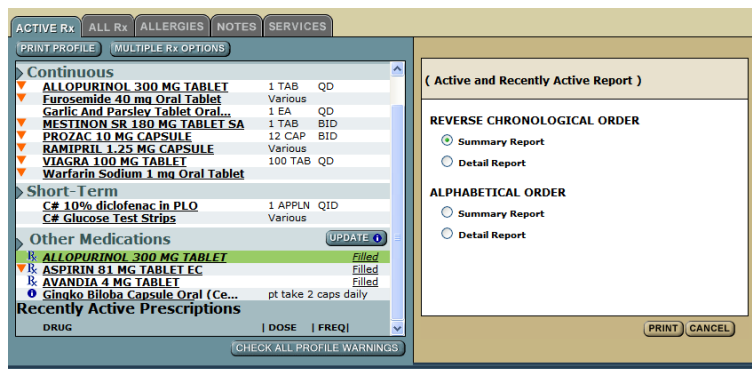
4. *Click* PRINT .

Print Multiple Rx Options

This option is only available for prescriptions that have not been filled.

1. *Click* **Multiple Rx Options** *tab.*

2. *Click on* **Print** *tab.*

3. **Check** *the prescriptions to print.*

4. *Click* PRINT *button.*
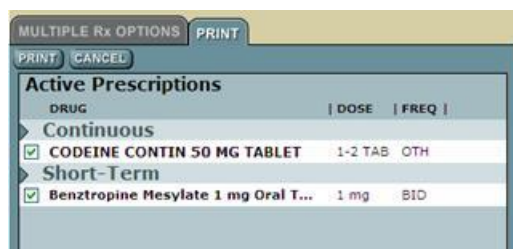
Notes:

View or Print Clinical Drug Monograph

1. *Select a prescription.*

2. *Click the* MONOGRAPH *button from the Rx Details page.*

3. *Click* **Expand All** *or click on the* **Item** *you want to view such as Dosage and Administration.*

4. *Click* **Print.**

Notes:

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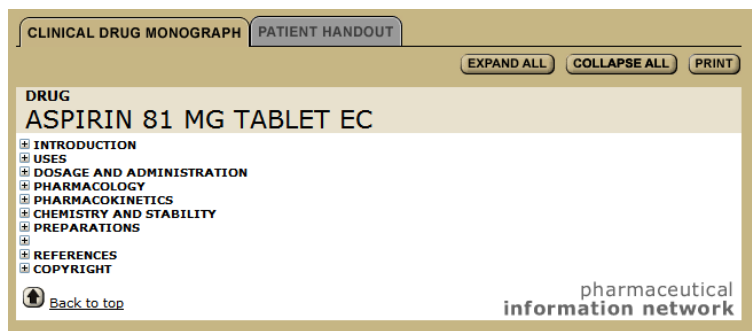
Print Patient Handout

1. *Click* **Expand All.**

2. *Click* **Print.**

Notes:
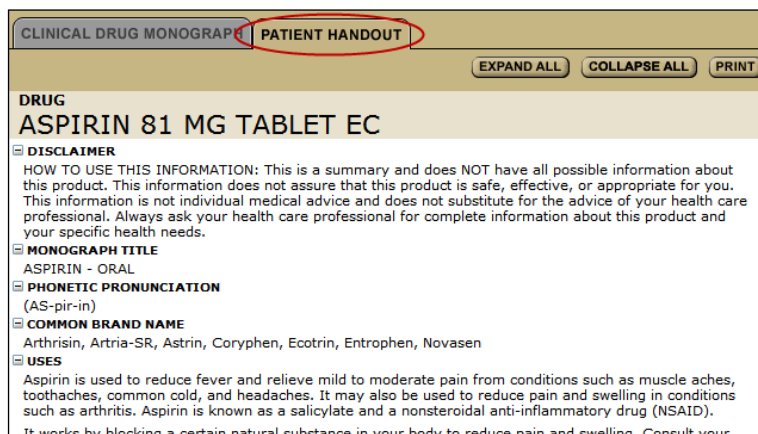
Prescribing within PIN or within an RTI Environment

For information on prescribing within PIN or within an RTI environment, please contact your eHealth Consultant or the Provincial Help Desk for assistance in setting up your User Preferences.

Provincial Help Desk: toll free at 1-877-931-1638.

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Activity 12: Viewing Eligibility in Person Directory (PD)

Person Directory (PD) is the source of truth for Alberta Health Care Insurance Plan (AHCIP) Eligibility, First Name, Last Name, Date of Birth, Gender and Personal Health Number (PHN).

Open PD from the Home Page and Search for a Patient

Click the Home *button on the* Menu Bar *at the left side of your screen to return to your Home page.*

In the Person Directory windowlet click the Open *button.*

Notes:

> *To configure your Home page to display the Person Directory Open button, consult the Person Directory Quick Reference, How to Set Up Access to Person Directory.*

The **Person Search Criteria** *screen is displayed*

The primary search fields are:

1. *Type* **Simpson** *in the* Last Name *field.*

2. *Type* **George** *in the* First Name *field.*

3. *Type 1930-Jun-22 in* Date of Birth *field.*

4. *Click* Search.

Click the name of the person *you want to view on the* **Search Results** *screen.*

When ready to exit PD, click the Quit *link (top right corner of the screen).*

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View Demographic Information, AHCIP Eligibility and Additional Information

1. **Name and Person Details:** *Click* **view…** *(to the right of the Name and Person Details title) to edit preferred names, date of birth details and/or date of death details*.

   > **Note:** Most users will have View Only privileges in PD. If **[edit…]** is displayed at the top of the PD screen, that user also has privileges that allow him/her to make changes to data in PD.

2. **All Names***: Click* **View all names…** *to view preferred, alias, legal and maiden names.*

3. **Address and Phone Numbers**: *Click* **View all addresses and phone numbers…** *to view additional residential and business addresses. Address history can also be viewed.*

4. **Eligibility:** *Click* **View eligibility…** *to view current eligibility information for the Alberta Health Care Insurance Plan (AHCIP). Eligibility history is also shown. Current eligibility Start Date is the most recent date that the person became eligible for coverage.*

5. **Additional Information:** *Includes Alberta Personal Health Card requests. Only those with Update Permission Levels may request a PHN Card.*
   Merge Potential Duplicates: *Used when one person has two PHN/ULIs. Once verified, the two records will become linked. Additional links may be Registration Validation*.

Notes:

Activity 13: Log out of the Alberta Netcare Portal Training Environment

Log Out

Click **Logout** *in the upper left corner of the ANP screen.* *You will be returned to the Training Environment Home page.* **Close the internet browser** when you are finished.	Notes:

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Appendix A: Super User Training Checklist

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

⚠️ *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
❑ access.albertanetcare.ca OR
❑ through EMR
OR
From within an AHS Facility
❑ portal.albertanetcare.ca

Getting Started

Security and Privacy
❑ Never share your Alberta Netcare Portal User ID and/or password. You are responsible for all access under your security credentials.
❑ Only access health information necessary fulfill your job responsibilities, and keep this information confidential.
❑ 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.
❑ 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 Alberta Netcare Portal Login Page(refer to Activity 1)
❑ Review Terms of Use and Disclaimer See Script above
❑ Review Security and Confidentiality See Script above
❑ Review Need Help section and Help Desk phone numbers
❑ Point out Alberta Netcare News
❑ Point out location of Data Availability Table
❑ Point out location of Alberta Netcare Forms
❑ Point out and demo Learning Centre
❑ Quick Reference
❑ E-demo
❑ User Guide
❑ FAQ
❑ Context Menu

Login to Training Environment (refer to Activity 2)
❑ Select user id based on permission level
❑ Password: Training4321
❑ User Name (top left)
❑ Home
❑ My details
❑ Help
❑ Log Out
❑ Common
❑ My Details
❑ Work Lists
❑ Favorites
❑ Searches
❑ eReferral
❑ Patient Lists
❑ Clinical eTools
❑ Resources
❑ Enhancement Request
❑ 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.

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Searching for Specific Results (Activity 7)

- ❑ View by
- ❑ Look For
- ❑ Critical
- ❑ Status

Locate and View a Flowsheet (Activity87)

- ❑ 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

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Logout of Alberta Netcare Portal Training Environment (Activity 13)	Log on to Production/Live ANP
❑ Logout	❑ 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	Configure My Details
❑ 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	❑ Demo how to synchronize PIN/PD credentials. ❑ Identify the user's access level ❑ Show how to change Inactivity Time Out ❑ Show CDV Limited Records

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Appendix B: Sample Lesson Plan

Lesson Objectives

KNOWLEDGE
☑ Users will be aware of Privacy and Security as well as Acceptable Use policies associated with Alberta Netcare
☑ Users will know where to locate help desk information

SKILLS
☑ Users will be able to locate and access information in the Alberta Netcare Learning Centre
☑ Users will be able to open the Data Availability Table
☑ Users will be able to locate and open a patient record
☑ Users will be able to locate and open the health information they require in their role, and use it appropriately

MATERIALS
☑ Projector/ laptop
☑ Computer lab
☑ RSA token
☑ New User Self -Study Activity

RESOURCES
☑ access.albertanetcare.ca (community)
☑ portal.albertanetcare.ca (AHS)
☑ Alberta Netcare Learning Centre: http://www.albertanetcare.ca/LearningCentre/
☑ Terms of Use and Disclaimer
☑ Alberta Netcare Super User Training Guide and/or Checklist
☑ Community/AHS Setup Guides

METHOD DESCRIPTION	TIME (MINS)
☐ Introduction to Alberta Netcare	5
☐ Security and Privacy Awareness and best practices	10
☐ Alberta Netcare Training- refer to Alberta Netcare Super User Training Guide / Super User Training Checklist	30-45
☐ Conclusion: Summarize key points- privacy and security, help desks, learning Centre, Q&A	10
☐ Have users complete New User Self-Study Activity	15-20
☐ Review New User Self-Study Activity	5
☐ Review credential delivery (as per site process)	5

Follow-up Tasks

- ❑ Read Terms of Use and Disclaimer, and Alberta Netcare Open Letter
- ❑ Logon to ANP- see Setup Guide for Community or AHS **OR** follow procedure for site

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Lesson Objectives

KNOWLEDGE

SKILLS

MATERIALS

RESOURCES

METHOD DESCRIPTION	TIME (MINS)

Follow-up Tasks

❑
❑

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Appendix C: Teaching Strategies

Adult Learning Principles

1. **Adults will learn only what they feel they need to learn.** Adults are practical in their approach to learning. They want to know, "How is this going to help me do my job?" Be practical, concise and direct. Use examples of how the various functions in Alberta Netcare relate to the work the person performs.

2. **Adult learning focuses on problems.** The more the learning can address the users' problems, the more relevant it will be. Begin by identifying current tasks and how the use of Alberta Netcare will make those tasks easier, faster or more accurate. Develop practical activities/examples to teach specific skills.

3. **Adults learn by doing.** Rather than just showing users, give them an opportunity to do things. Adults need to be able to use skills immediately so that they see their relevance and remember how to do things. If you are training more than one person, ask for volunteers to try things. Give them actual exercises and/or examples so they can test the functionality themselves. If your session is one-on-one, consider asking the new user to 'drive' while you direct them.

4. **Experience affects adult learning.** Use the learners' experience (negative or positive) to build a positive learning environment. Make sure negative past experiences are acknowledged and addressed. This is particularly important for users who may not be technically savvy. Spend the necessary time with them to ensure they are comfortable using Alberta Netcare and have the opportunity to ask questions.

5. **Adults learn best in an informal situation.** Make the environment relaxed, informal, encouraging and inviting.

6. **Involve adults in the learning process.** Let them discuss issues and decide on possible solutions. In the case of Alberta Netcare, make sure the users have a chance to understand how each of the Alberta Netcare functions works and how it might be integrated into their workflow.

7. **Adults want guidance.** Adults want information that will help them improve their work situation. They do not want to be told what to do, nor do they want to be left to fend for themselves. They want to be respected. They want to choose options based on their individual needs. Present options, not instructions.

Learning Styles

We all have different preferences on how we approach new learning as well as preferred learning styles – the way in which we best absorb and process information. When teaching adults:

✓ Be aware of various learning styles (see below).

✓ Know your own style. Remember that what works best for you does not necessarily work for others.

✓ Acknowledge the preferred learning style of your student(s). Ask your student(s) how they like to learn.

1. **Visual Learners**

    Visual learners learn through seeing. They relate most effectively to written information, notes, diagrams and pictures. These learners need to see the instructor's body language and facial expressions to fully understand the content of a lesson. They may think in pictures and learn best from visual displays including:

    ◆ Handouts
    ◆ PowerPoint Presentations
    ◆ Videos
    ◆ Flipcharts
    ◆ Diagrams

During a training session or classroom discussion, visual learners often prefer to take detailed notes to absorb the information. This is why some will take notes even when they have printed course notes on the desk in front of them.

Visual learners make up around 65% of the population.

2. **Auditory Learners**

Auditory learners learn through listening. They prefer lectures, discussions, talking things through and listening to what others have to say. Auditory learners interpret the underlying meanings of speech through listening to tone of voice, pitch, speed and other nuances. Written information may have little meaning until it is heard. These learners often benefit from reading text aloud and using a tape recorder. They will tend to listen to a lecture, and then take notes afterwards, or rely on printed notes.

Auditory learners make up about 30% of the population.

3. **Tactile/Kinesthetic Learners**

Kinesthetic learners learn through doing and touching. They learn skills through imitation and practice, using a hands-on approach. They may find it hard to sit still for long periods and may become distracted unless they are given an opportunity to participate.

Kinesthetic learners make up around 5% of the population.

Summary

All of us utilize all three types of learning, but most people display a preference for one over the other two. In early life the split amongst the overall population is fairly even, but by adulthood the visual side of learning is dominant.

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Appendix D: Service Desk Contact Information

Please visit http://www.albertanetcare.ca/LearningCentre/Contact.htm to access a complete list of service desks available.

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Appendix E: Types of Available Data

An up-to-date *Data Availability Table* can be viewed on the Alberta Netcare Portal login page under the section Alberta Netcare Information. It provides a listing of all currently available data sources.

As Alberta Netcare Portal evolves, more and more data will be available for viewing in the patient's EHR.

To include your site's data in the Alberta Netcare Portal, call the Provincial Help Desk at 1-877-931-1638 to initiate this process.

Viewing Option	Description	Viewing Option	Description
Anatomic Pathology	Cytology reports excluding bone marrow, peripheral smears and cytogenetic reports	Consultations	Consultation reports
Blood Bank	Blood bank results excluding 'allocated unit' result	Diagnostic Imaging	Diagnostic Imaging reports
Blood Gas	Full panel blood gas results	Discharge / Transfer Summaries	Discharge and transfer summaries
Blood Products	'Allocated unit' reports	ECG	Scanned ECG tracings
Chemistry	Chemistry, special chemistry, special investigations and trace elements excluding fluids or toxicology	EEG	Electroencephalogram results
Coagulation	All coagulation reports	Emergency Records	Scanned Emergency Department records
Cytogenetics	Cytogenetic results from Anatomic Pathology	Evoked Potentials	Evoked response results
Drug Levels	Toxicology reports from Chemistry	History	History reports
Fluids	Fluids results from Chemistry	Letters	Various letters
Hematology	Hematology, bone marrow and peripheral smears from Anatomic Pathology	Operative / Procedures	Operative and procedure reports
Immunology	Histocompatibility lab, immunology and serology	Progress Notes	Physician progression notes
Microbiology	Microbiology, microbiology miscellaneous, provincial lab and community health TB data	Reports	Reports that do not belong under the above categories
Other	Collection sites, environmental toxicology, miscellaneous and send-outs	Summary Reports	Most recent Community Care Profile information generated from the Community Care/Home Care system
Point of Care	Point of Care glucose results	Labs Pending Collection	Future dated (standing) orders. Always located at the bottom of the CDV tree.
Trace Elements	Trace Element results	Last 24 hours	When the Clinical Document Tree is set to "View by Date", the standing orders are listed in the "Last 24 hours" folder.

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