ACCURO®

USER GUIDE

CII & CPAR

For Alberta Health Services

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WELCOME TO COMMUNITY INFORMATION INTEGRATION & CENTRAL PATIENT ATTACHMENT REGISTRY (CII & CPAR)

Alberta Netcare Integration

CII and CPAR is the chosen vehicle to enhance community EMRs with two-way data flow.

Community Information Integration (CII) is a system that transfers select patient information between community Electronic Medical Records (EMRs) and other patient care team members through Alberta Netcare.

Central Patient Attachment Registry (CPAR) is a provincial system that captures the confirmed relationship of a primary provider (family physician, pediatrician or nurse practitioner, etc.) and their paneled patients.

Together, CII and CPAR enable two foundational change elements in the implementation of the Patient's Medical Home: health system integration and improved continuity of care.

CII & CPAR:

- Enables sharing of important healthcare information between the patient's primary provider and other providers in the patient's circle of care.
- Facilitates sharing of consultation reports back to the patient's primary provider and other providers.
- Identifies relationships between patients and their primary provider.

CII and CPAR are important technical enablers to improved patient care. CII and CPAR help clinics identify patients whose continuity of care is sub-optimized. Knowing that a patient is paneled to another provider creates an opportunity to confirm roles and responsibilities in care provision.

For PCNs and clinics already invested in panel management, CII and CPAR is the next step to promote a coordinated care management approach to service delivery and achieve better patient, provider, and system outcomes.

Healthcare providers can already access Alberta Netcare Portal to view a 'snapshot' of care received by a patient. CII and CPAR aim to increase value by sharing select information from family physicians and other community providers via Community Encounter Digests and consultation reports.

CPAR

Overview

The **Central Patient Attachment Registry** (CPAR) is a provincial system for Alberta that captures the confirmed relationship of a primary provider and their paneled patients.

Mapping

Please see the CII & CPAR Accuro Mapping document for the details on *what* data is collected and *where* that data originates in Accuro.

Setup: Provider Configuration

Configuration Pre-Requisites

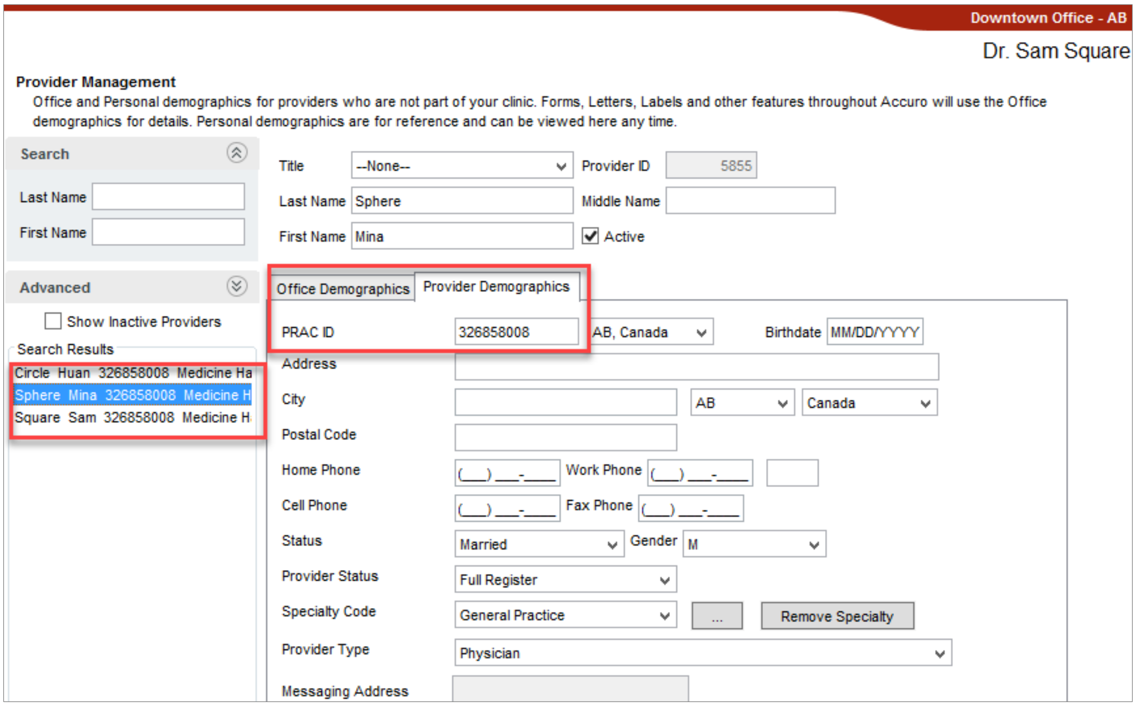
- A provider must enroll to the CPAR program with Alberta Health.
- Accuro configuration can begin when notification of CII approval is received from Alberta Health.
- Configuration for CPAR is a one-time activity performed by the clinic for each primary provider.
- Provider configuration for CPAR must be completed by a System Administrator.
  Providers require access to:
  - **The Provider Wizard window** Accuro Start Menu >Tools > Configure Providers
  - **The Form Editor** Accuro Start Menu > Tools > Form Editor
  - **The Form Mapper** Accuro Start Menu > Tools > Map Forms

Step 1: Enter the Provider’s PRAC ID

Providers must have a PRAC ID recorded in Accuro to be enabled with CPAR.

To check if the Provider you are setting up has a PRAC ID, follow these steps:

1. In Accuro, select **F2** for Provider Management.
2. Select the name of the Provider.
3. Open the **Provider Demographics** tab and review the PRAC ID. If no ID displays, enter the PRAC ID, then click **Update Provider**.



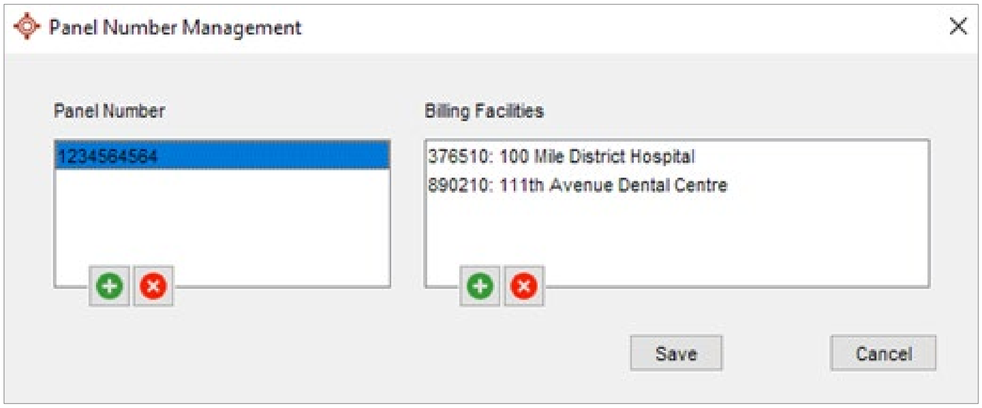
Step 2: Enter Your CPAR Panel Number

Panel Numbers are generated by CPAR upon registration and sent by email to the clinic's Panel Administrator.

Enter your Panel Number from Alberta Health into Accuro:

1. Click on the Accuro Start Menu> Tools> **Configure Providers**.
2. Click on the **Provider Demographics** tab.
3. In the Panel Number field, click **Manage.**
4. In the Panel Number area, select the **Add** button to add a new panel.
5. Type in your **Panel Number** from Alberta Health.
6. In the Billing Facilities area, select the **Add** button to enter the billing facilities associated with the Panel Number.

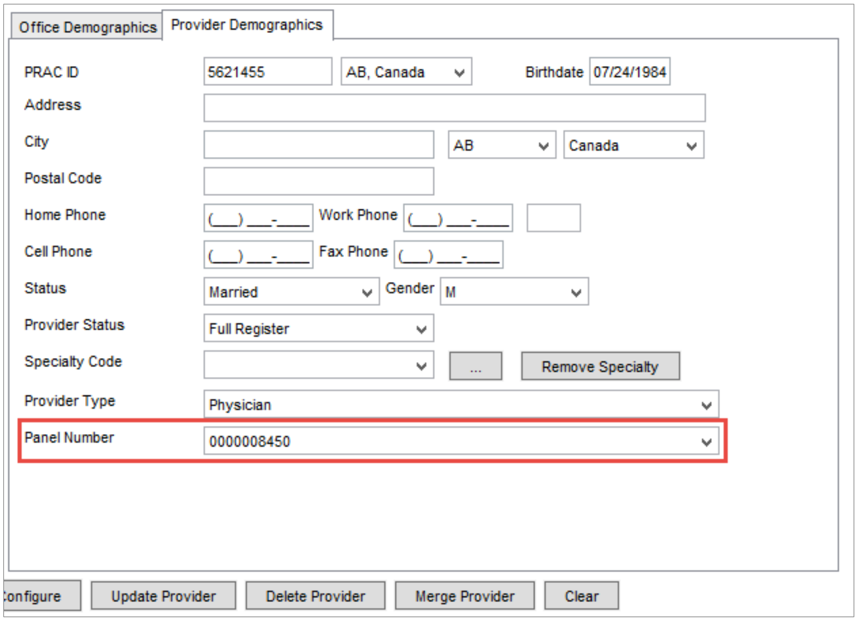
   For Providers working in multiple locations using the same AccuroEMR, enter in each location.
7. Click the **Save** button.



Step 3: Assign Panel Numbers to Providers

Now that the Panel Number has been added into Accuro, it's time to assign it to the Provider.

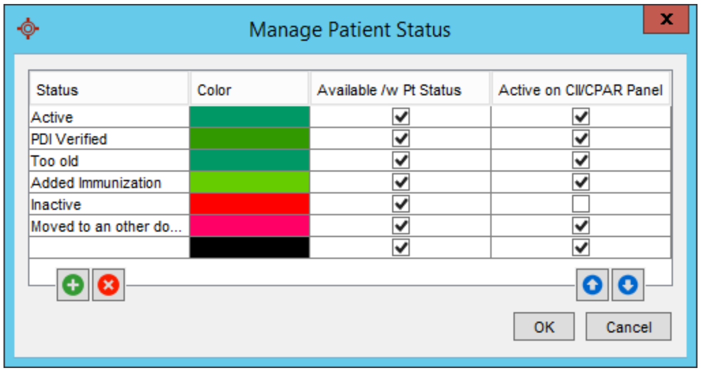
1. Click on the Accuro Start Menu> Tools > **Configure Providers**.
2. Select a Provider.
3. Click on the **Provider Demographics** tab.
4. In the **Panel Number** field, choose the appropriate Panel Number for the Provider.
5. Click **Update Provider** to save your changes.



Step 4: Manage your Patient Status

Only patients with a Patient Status that is categorized as Active on the CII/CPAR Panel are considered eligible to be added to a Panel and submitted to CII/CPAR. Panel status types must be reviewed as part of configuration.

1. Navigate to the **Patients** section.
2. Click on the **Status History** tab.
3. Click on the **Edit** button.
4. Enable the checkbox in the **Active on CII and CPAR Panel** column for every Status that should be considered when adding the Patient to a Panel.
5. Click **OK** to save.

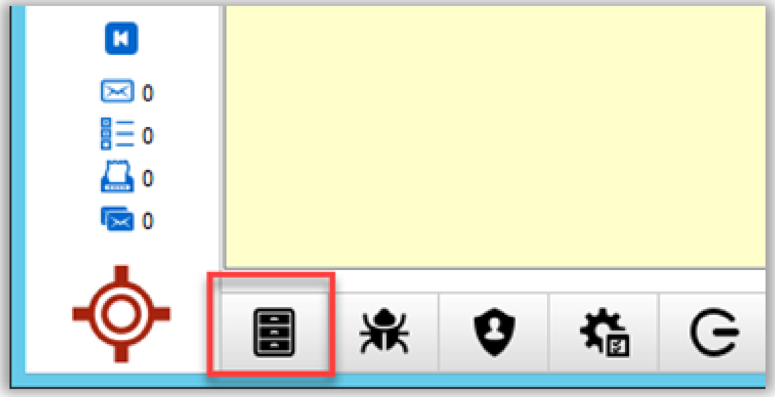


Step 5: Note Your Transaction IDs in the File Queue

The first time you use CII and CPAR, Alberta Health will request transaction IDs for your first few data uploads. Your Transaction IDs are located in Accuro's File Queue.

To access transaction IDs in the file queue, as a System Administrator:

1. In the **Accuro Start Menu**, search for "**File Queue**"
2. In the File Queue window, open the Queue drop down list and select **CII/CPAR**. New fields and columns then appear next to the Queue drop down list.
3. Open the **Category** drop down list to display transaction IDs of that type.
4. Your Transaction ID's display in the right-hand column labelled, '**Transaction ID**'



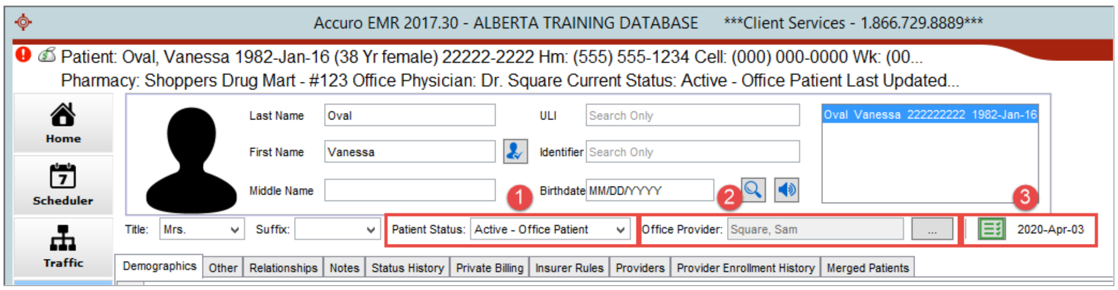
Setup: Patient Configuration

Patients must meet the following criteria to be Paneled to a Provider and sent to Alberta Netcare:

1. The patient's **Status** is categorized as **Active** on CII & CPAR Panel.
2. The Patient has a **Verification Date.**
3. The patient has a **Last Visit Date.** This is the most recent date the patient visited the Provider, or any other Provider within the same family practice.

   Note: Accuro checks your entire visit history without date restrictions to determine the last visit.

4. The patient is linked to the Provider using the existing **Office Provider** field. See Linking Patients to Providers.



Linking Patients to Providers

1. Click the **Patients** button in the Accuro Side Bar.
2. Click the **Providers** tab.
3. Click the **Ellipses** button next to the Office Provider text box.
4. Providers that exist in your clinic display in the search results. Click on a Provider's name in the results, then click **Select**.
5. Click **Update Patient**.

Clinic Workflow

As part of your successful participation in CPAR, the following workflow processes must be implemented by your clinic – both in and out of Accuro.

Workflow A: Maintain Up-to-Date Patient Information

Your clinics must update Patient information as part of your everyday workflow to ensure that:

1. New patient's statuses are categorized as **Active** on CII & CPAR Panel.
2. New patients are linked to a Provider using the existing **Office Provider** field.
3. All Patients have a **Verification Date**.
4. The Patient has a **Last Visit Date** recorded in Accuro.

Automatic Syncing
Consult report documents (letters, forms) automatically transmit and update with NetCare. When files attached to a Patient's virtual chart are deleted, they are also deleted from NetCare.

Deleting Items

To delete documents from a Patient's EMR chart:

1. With a patient globally selected, open the **EMR** section of Accuro.
2. Open the **Virtual Chart**, then navigate to the **Documents** folder.
3. Right click a document, then select **Delete Now**.
4. Click **Yes** to confirm.

Note: Users cannot delete reviewed documents. If the **Delete Now** selection is greyed out, the document must be unreviewed. Alternatively, Accuro Users can be given permission to Delete Reviewed Chart Items.

To unreview documents:

1. Click **Home** then open the **Documents** folder.
2. Note the review date.
3. Click **Review History**.
4. In the Document Review History window, select your **date range** and **Provider**.
5. Click the Unreview Selected check box.
6. Click **Close**.

To give Users permission to Delete Reviewed Chart Items:

1. Open the Accuro Start Menu, then search for "**Manage Security**"
2. Open System Settings > General.
3. Scroll down to the Encounter Notes section, then activate the '**Allow Users to Delete Reviewed Chart Items**' check box.
4. Click **Save Settings**.
5. General > Allow Users to Delete Reviewed Chart Items Checkbox

Note: this is a global system setting that affects all Accuro users at your clinic.

Restoring Deleted Items

To restore deleted items:

1. Open the Accuro Start Menu, then search for "**Manage Security**"
2. Click **Audit Logs**.
3. Double click the **Date Range** filters to search for Activities between those dates.
4. Use the **Activity** drop down list to select the document type.
5. Right click the Activity, then click **Restore**.

Workflow B: Check for Errors in Accuro

Accuro helps determine which panels will be successfully submitted and which ones are showing as duplicates or with missing information (things Accuro *knows* will be rejected by AH).

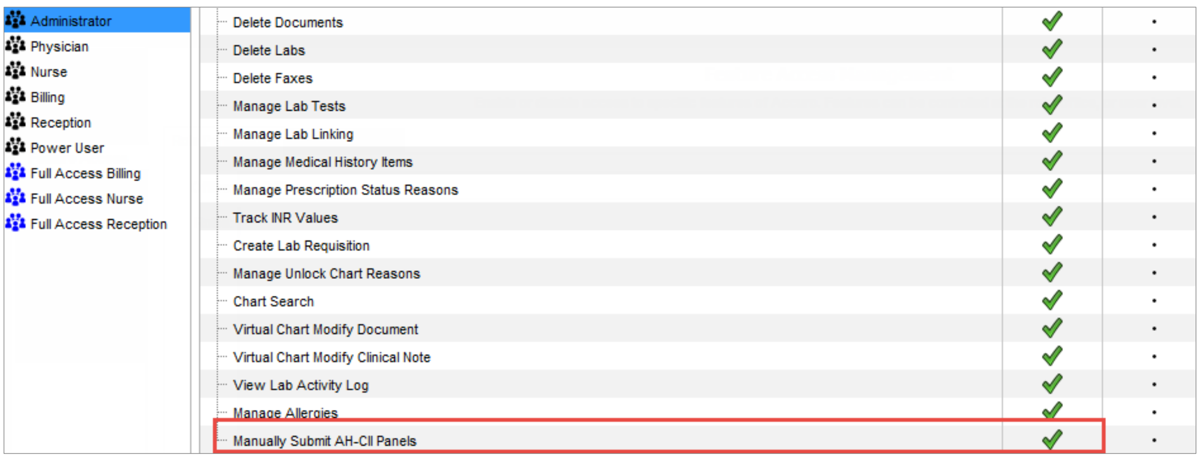
To ensure a successful submission, errors in Accuro can be identified quickly, then fixed by your Clinic in Accuro prior to the 12th of each month.

Trainer Tip - *If you are the Panel Administrator (or the person who will be checking for errors in the CPAR Panels for your clinic), we recommend you set a recurring calendar reminder before the 12th of each month!*

Step 1 - Setup
Errors are displayed in the **Manually Submit CII & CPAR Panels** window.

To view the CII and CPAR window in Accuro, a System Administrator with access to Manage Security must enable the permission on the user's profile. To enable permission for AH-CII Panels:

1. Accuro Menu> Users> **Manage Security.**
2. Select **Feature Access**, then click to highlight the Role.
3. Enable '**Manually Submit CII/CPAR Panels**'



To access the CII/CPAR window once permission is enabled:

1. Navigate to the Accuro Start Menu and search: "**Submit CII/CPAR Panels**"
2. Choose **Panel** from the Panel Number field.

Step 2 - Window Overview & Fixing Panel Errors

Providers associated with each Panel Number are listed in Provider Details. Patients associated with each Provider are listed in Patient Details.

Included in Submission Tab

Shows a list of patients that meet the Patient Configuration requirements. There are no action items in this view.

Ignored in Submission Tab

Shows data points that are missing required information and were not sent to Alberta Health. The missing information could be a Last Visit Date, Verification Date, or the Status of the patient may not be set as Active on the CII & CPAR Panel.

Users reviewing Panel errors prior to the 12th of each month should check this tab and manually correct any errors within the respective section(s) of Accuro using the CPAR Patient Configuration section of this guide.

Duplicate Patient Data Tab

Shows errors related to duplicate patient information. To correct duplication errors, update your patient records with correct information.

Trainer Tip: *Learn more about Patient Merging Permissions by searching for "Merging" in the Accuro User Guide!*

Note: If you cannot locate the source of an error in the Patient Details window, see Step 5: Note Your Transaction IDs in the File Queue.

Workflow C: Check for Errors in Alberta Health Portal

There may instances where Accuro does not catch every error. In these cases, the error is detected after information is received and Quality Controlled by Alberta Health. Panel Administrators (or the person who will be quality controlling the CPAR Panels for your clinic), are encouraged to check on their submissions within the provided Alberta Health portal. Please check with Alberta Health for the portal details after the 12th of each month.

Trainer Tip: *If you are the Panel Administrator, we recommend you set a recurring calendar reminder after the 12th of each month as a reminder to check these panels in the Alberta Health portal!*

If Alberta Health declares a **minor error**, the user can fix the error in Accuro, then re-submit the correct information with the following month's re-submissions.

If Alberta Heath declares a **major error**, the user must correct the error in Accuro and then immediately re-submit to the panel.

Re-submit Panel Manually (Major Error)

To resubmit a CPAR Panel Manually, user must have the correct permissions. To enable access to the 'Manually Submit CII/CPAR Panels' window, follow these steps:

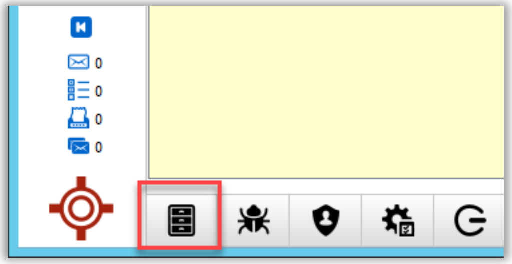
1. Identify and correct the error in Accuro.
2. Navigate to the Accuro Start Menu and search, "**Submit CII/CPAR Panels**"
3. From the '**Panel Number**' dropdown, select the appropriate Provider and Panel.
4. Click **Submit**.

Workflow D: Transaction IDs

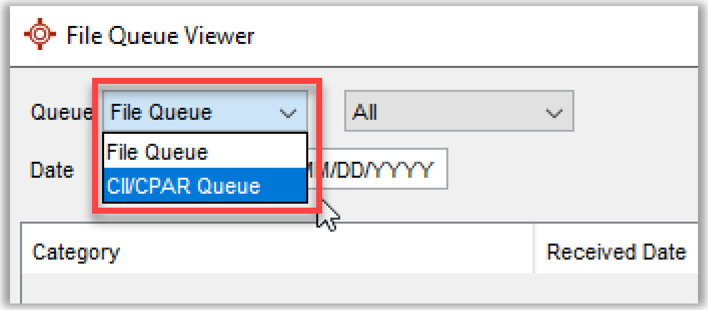
You can review your clinic's Transaction IDs in the Accuro File Queue Viewer.

To launch the File Queue Viewer:

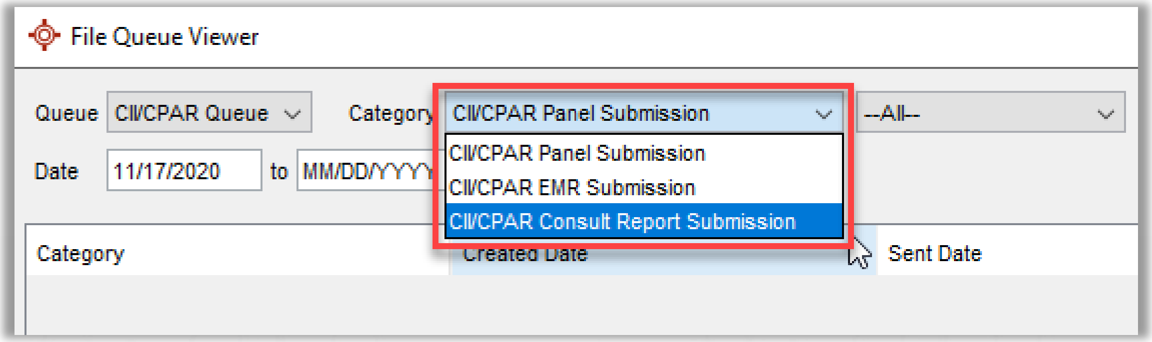
1. In the Accuro Start Menu, search for "file queue" then select '**View File Queue**'
   Alternatively, select 'View File Queue' from your Quick Access Icons.



2. In the File Queue Viewer window, use the '**Queue**' drop down list to select **CII/CPAR Queue**.



3. Use the '**Category**' drop down list to filter Transaction IDs by Panel, EMR, or Consult Report.



4. Your Transaction IDs display in the right-hand column of the File Queue Viewer.

CII: ENCOUNTER DATA SHARING

Overview

Community Information Integration (CII) is a system that transfers patient information between Electronic Medical Records (EMRs) and other members of the patient's care team through Alberta Netcare.

Data is submitted to CII when an encounter with a paneled patient is recorded in Accuro, such as an appointment. The data attached to the appointment is automatically gathered and submitted to CII.

CII Encounter Mapping

The Mapping document contains the details for *what* data is collected from Accuro and submitted to CII Encounter Data Sharing.

Setup: Provider Configuration

Pre-Requisites

1. A Provider must enroll to the "CII/CPAR – Encounter Data Sharing" program with Alberta Health.
2. Once notification of CII approval is received from Alberta Health, the configuration can begin in Accuro. Provider Configuration for CII must be completed by a System Administrator. Providers require access to:

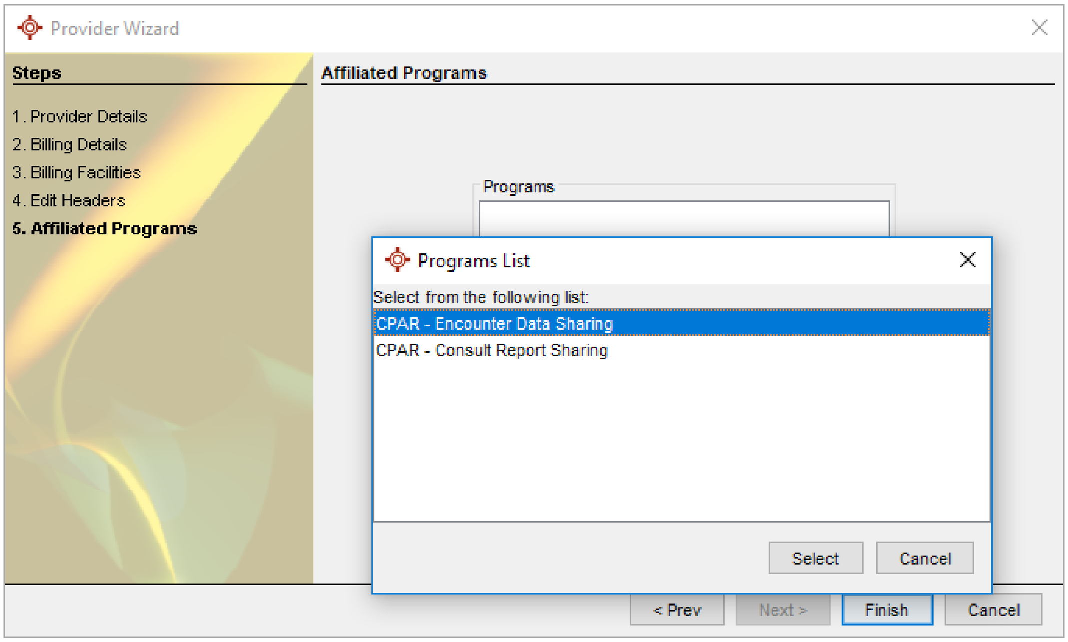
The Provider Wizard window:	*Accuro Start Menu > Tools > Configure Providers*
The Form Editor:	*Accuro Start Menu > Tools > Form Editor*
The Form Mapper:	*Accuro Start Menu > Tools > Map Forms*

Step 1: Enable Encounter Data Sharing for Providers

To enable a Provider in the CII – Encounter Data Sharing program:

1. Click on the Accuro Start Menu > Tools > **Configure Providers**.
2. Select a Provider and click **Configure**.
3. Click the **Next** button until you get to the **Affiliated Programs** page.
4. Click the **Add** button and select '**CPAR – Encounter Data Sharing'** from the list.
5. Click **Finish** to save your changes.

Note: Repeat these steps for each Provider.



Step 2: Map Forms for Submission

The second part of CII configuration includes mapping the existing **Diagnostic Orders, Lab Orders**, and **Referrals** of participating Providers to a new (CII specific) Form Type.

Accuro searches the database for the CII Participating Providers and the Forms these Providers used, that have been categorized with this Type and prepares these documents for CII Submission to Netcare.

Mapping Diagnostic Orders

Diagnostic Orders must be categorized as a Requisition Form before they can be mapped to the appropriate CII Form Type.

1. Open the **Form Editor** (Accuro Start Menu > Tools > Form Editor).
2. Select an existing Form being used for Diagnostic Orders by the clinic.
3. From the **Category** dropdown, select "**Requisition Forms**"
4. Then click **Save** to save this Form.

   Repeats steps 2 – 4 for all Diagnostic Orders used by the clinic.

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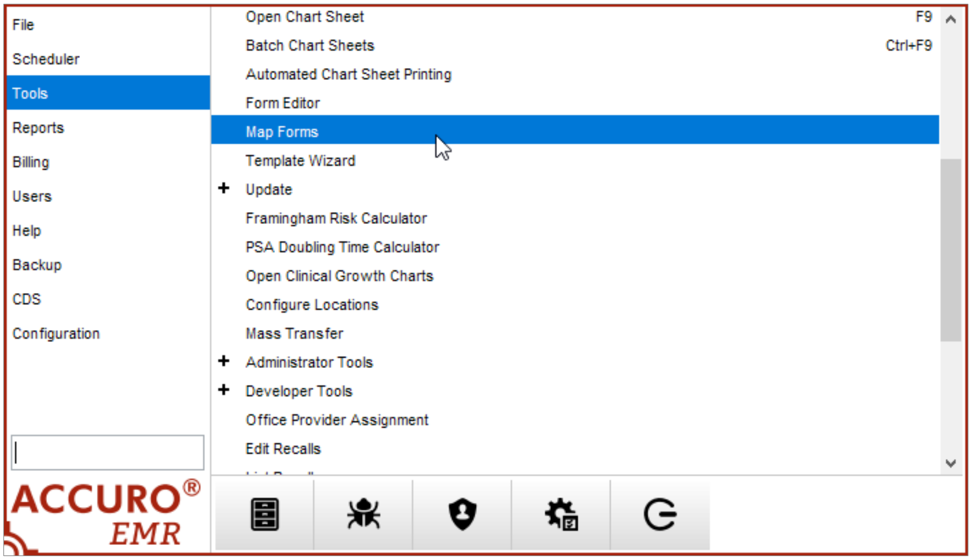
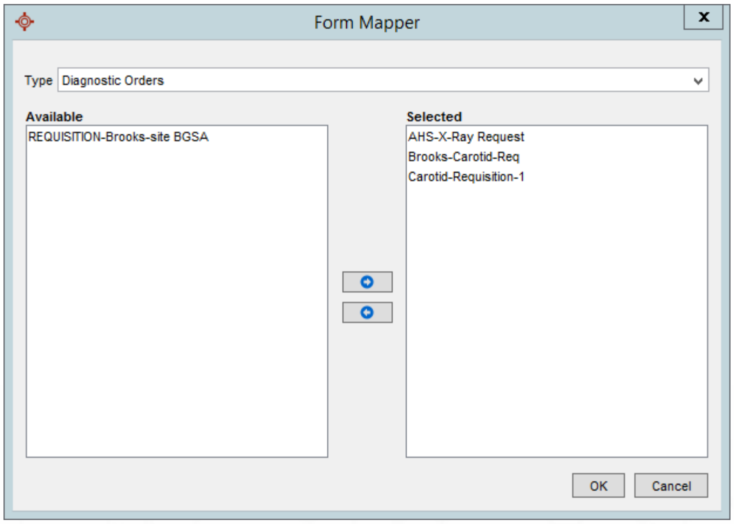
Next, map the Diagnostic Orders to the appropriate CII Form Type:

1. Open the Accuro Form Mapper (Accuro Start Menu > Tools > Map Forms).



2. In the Type dropdown, select "Diagnostic Orders"
3. Select the forms within the 'Available' pane and click the button with the right pointing arrow to move the form into the 'Selected' pane.

   Once all the Diagnostic Orders are moved into the 'Selected' pane, you're done!



Mapping Lab Orders

Lab Orders must first be categorized as a Requisition Form before they can be mapped to appropriate CII Form Type:

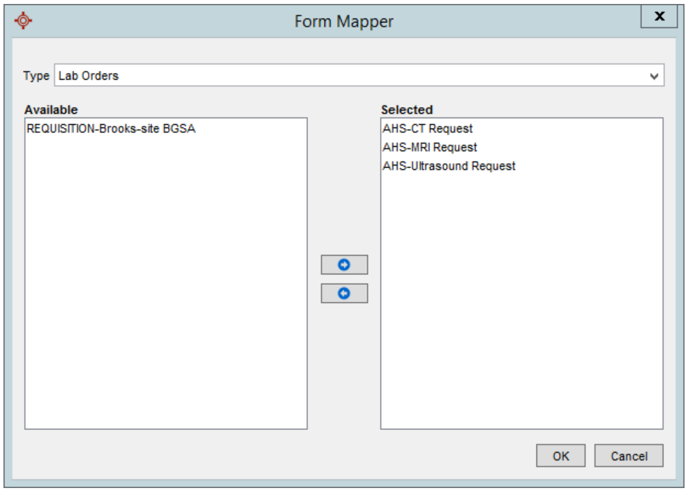
1. Open the Form Editor (Accuro Start Menu > Tools > **Form Editor**)
2. Select an existing Form being used for Lab Orders by the clinic.
3. From the **Category** dropdown, select **Requisition Forms**.
4. Then click **Save** to save this Form.

   Repeats steps 2 – 4 for all Lab Orders used by the clinic.

Next, map the Lab Orders to the appropriate CII Form Type:

1. Open the Accuro Form Mapper (Accuro Start Menu > Tools > **Map Forms**).
2. In the Type dropdown, select **Lab Orders**.
3. Select the forms within the '**Available**' pane and click the right arrow to move the form to the '**Selected**' pane.

   Once your Lab Orders are moved into the 'Selected' pane, you're done!

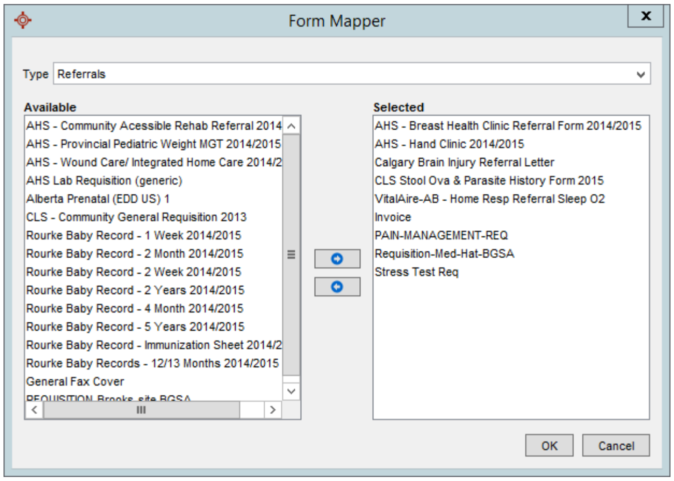


Mapping Referral Letters

The final part of CII Configuration is mapping the clinics Referral Letters. Unlike Diagnostic Forms and Lab Orders, Referrals do not need to be categorized as Requisition Forms in the Form Editor; you will only need to Map the Referrals to the appropriate CII Form Type.

1. Open the Accuro Form Mapper (Accuro Start Menu > Tools > **Map Forms**)
2. In the **Type** dropdown, select '**Referrals**.'
3. Select the forms within the '**Available**' pane and click the button with the right-pointing arrow to move the form into the '**Selected**' pane.

   Once all the Referrals are moved into the Selected Pane, you're done!



With your Clinics Diagnostic Orders, Lab Orders, and Referrals categorized appropriately, Accuro will constantly check to see when these forms are being used and submit the data to Netcare.

Note: Remember to repeat these steps for any new forms added to Accuro in the future.

Data Sharing, Clinic Workflow

As part of successful participation in CII, clinics need to adopt the following processes – both in and out of Accuro.

Workflow: Your Patients' Participation Rights

It is important to understand your patient's rights in sharing/not sharing data with Alberta Netcare. Although you have seen the benefits of this initiative, your patients may appreciate some coaching and explanation. Providing information to your patients about their rights is an essential component of success.

Let you patients know that they can request their CII data either be:

Shared with Alberta Netcare with the option to opt out for specific appointments if requested (more desired), or

Be made fully exempt from being sent to Alberta Netcare
(less desired)

Shared (with option to 'Do Not Share' for specific appointments) – More Desired
If a patient has elected to share their data with Netcare, all CII Data will be automatically shared from Accuro with no additional work from the clinic.

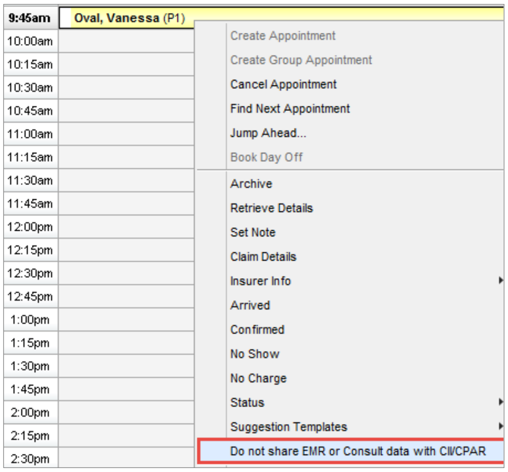
‘Do Not Share’ for a specific appointment

If a patient does not want the details of a specific appointment sent to CII, either the user scheduling the appointment or the physician (during the appointment) can request not to share information about a that appointment.

To prevent appointment information from being shared with CII:

1. In Accuro, navigate to the **Scheduler** section.
2. Open the Appointment.
3. Check the “**Do not share EMR or Consult data with CII/CPAR**” checkbox.

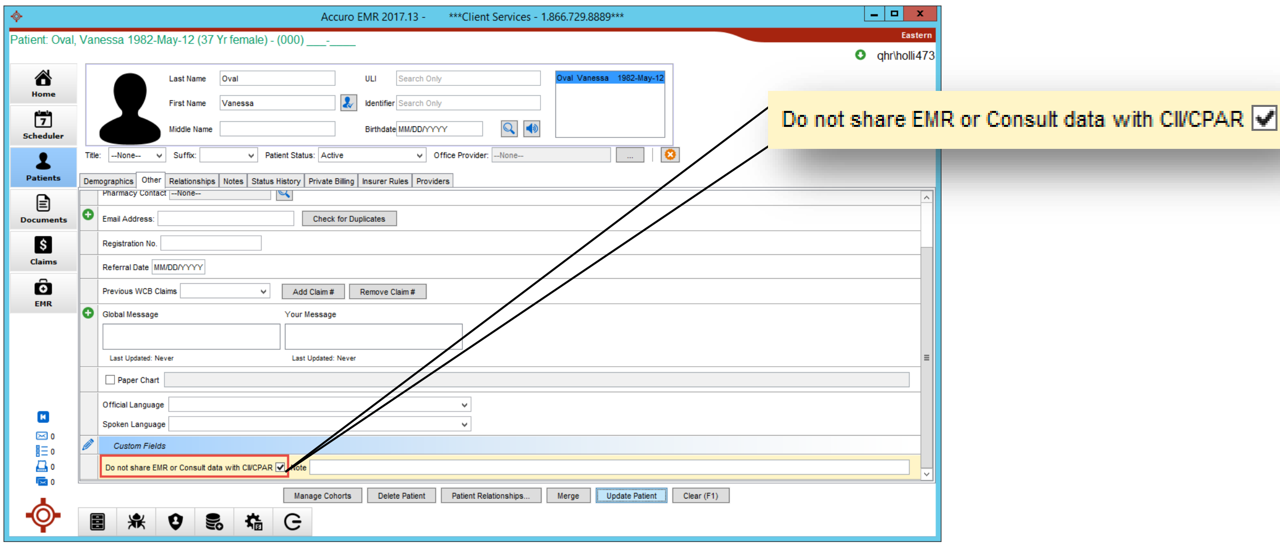
OR: Right click an appointment in the Scheduler and select, “**Do not share EMR or Consult data with CII/CPAR**”



Patient wants to their data to be fully exempt from submission to Alberta Netcare (less desired)

If a patient does **not** want their CII data to be shared with Netcare period, the Accuro user must:

1. Navigate to the **Patients** section and open a Patient record.
2. Click on the ‘**Other**’ tab.
3. Enable the “**Do not share EMR or Consult data with CII/CPAR**” checkbox.



Workflow: Encounter Sharing Rules for Submission

CII data must fall under certain criteria to be submitted to Alberta Netcare. While data submission takes place automatically, it is important that users understand the types of appointments that are excluded if the following criteria is missed:

Step 1: The Appointment must be considered 'Valid'

Based on CII Criteria, Accuro determines your appointments to be 'Valid' if:

1. The Patient is not flagged with **Do not share EMR or Consult data with CII/CPAR**.
2. The Appointment is not flagged with **Do not share EMR or Consult data with CII/CPAR**.
3. The Patient has an **Alberta ULI**.
4. The **Appointment's Date/Time** is *newer* than **Provider's opt-in date** to the AB CII/CPAR - share Encounter data program.
5. Appointment is not marked as **No Show**.
6. Appointment's **Facility** is neither None nor Blank.
7. Appointment is not a **Group Appointment**.

Step 2: The Patient must have a 'Valid' Chart item

Based on CII Criteria, Accuro determines a patient's chart item(s) to be 'Valid' if:

1. The Chart Item is associated with a valid Appointment.
2. The Chart Item has a recorded owner:

   The Chart Item's Date of Service/Alternative Date is *newer* than Provider's opt-in date to the AB CII/CPAR - share Encounter data program.

3. Chart Items with no recorded owner (e.g. History of Problems, Allergy, Immunization):

   Chart Item is shared with CII/CPAR if the associated Appointment's Scheduling Provider has opted-in to the "AB CII/CPAR - share Encounter data" program.

(Continued on next page)

4. Chart Item is 'Active.' The table below lists the applicable chart item types and the status/property values that define the chart item as "Active."

Chart Item Type	Eligible (Active)	Ineligible
Allergies (Allergy Agents)	Clinical Status is any of these values: • Confirmed or verified • Suspect	Erroneous, confirmed but inactive, Pending, Refuted Terminated and Reclassified, Unconfirmed
History of Problems (Health Concern)	• Status is Active • Negative is unchecked	Inactive, Suspected, Recovered
Immunization Summary (Immunization)	• Administered in Clinic is checked	Note: The Status field is a managed list (i.e. values are managed by clinic) and will not be used when determining active immunization.
Surgical/Medical History (Intervention)	• Negative is unchecked	Inactive, Suspected, Recovered
Active Medications (Prescribed Medication)	• Status is Active	Hold, Release, Discontinue, Cancel, Delete

5. The Chart Item was added within 48 hours of the appointment

Only chart items created ***within*** a 48h window after the appointment's date/time, are considered for CPAR submission. Chart Items with a missing Date of Service will be exempt.

The following diagrams show two appointments and three chart items. All chart items are **missing** Date of Service and their alternative date (e.g. created date) is used when creating the association to an appointment.

Appointment: APT1

- Appointment date/time: 2018-Sep-22, 1:30pm
- APT 1's 48h window is between A and B in the diagram above

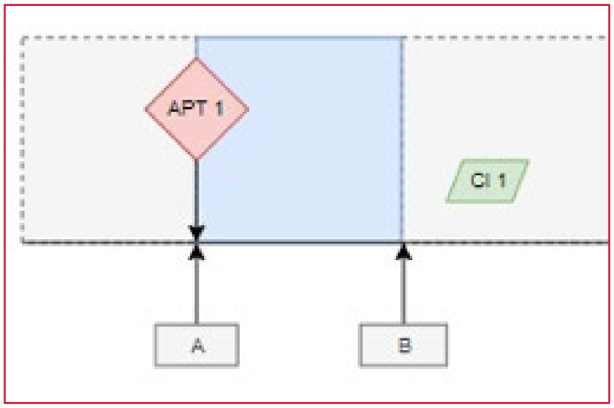


Chart item: CI 1

- Created Date: Nov-18 4:28pm
- CI 1 is "orphaned" and will never be associated with an appointment because alternative date falls outside "APT 1" time window (A-B).
- This will not be submitted to CII.

Appointment: APT2

- Appointment date/time: Feb-25, 11:30am
- APT 2's 48h window is between C and D

Chart Item: CI 2

- Created Date: Feb-26 9:09am
- CI 2 is associated with APT 2 because alternative date falls inside the 48h window (C-D).
- This will be submitted to CII

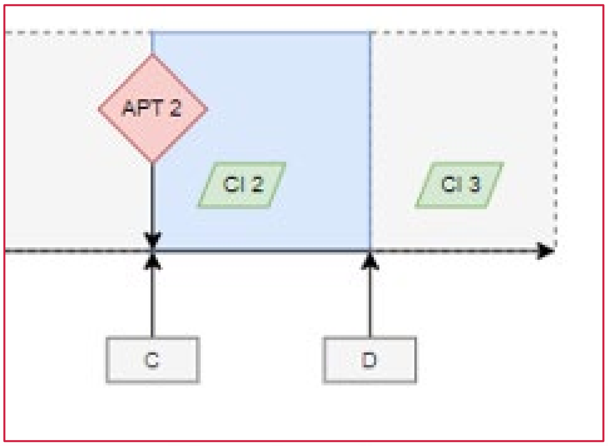


Chart Item: CI 3

- Created Date: Feb-28 10:10am
- CI 3 is "orphaned" and will never be associated with an appointment because alternative date falls outside APT2's 48h window (D).
- This will not be submitted

CII: CONSULT DATA SHARING

Overview

Community Information Integration (CII) is a system that transfers patient information between Electronic Medical Records (EMRs) and other members of the patient's care team through Alberta Netcare.

Data is submitted to CII when an encounter with a patient is recorded in Accuro, such as an appointment. The data attached to the appointment is automatically gathered and submitted to CII.

CII Consult Mapping

The Mapping document contains the details for *what* data is collected from Accuro and submitted to CII Consult Data Sharing.

Setup: Provider Configuration

Pre-Requisites

1. A provider must enroll to the "CII/CPAR – Consult Data Sharing" program with Alberta Health.
2. Configuration can begin in Accuro once notification of CII approval is received from Alberta Health. Provider Configuration for CII must be completed by an Accuro System Administrator. Providers require access to:

The Provider Wizard window	*Accuro Start Menu >Tools > Configure Providers*
The Form Editor	*Accuro Start Menu > Tools > Form Editor*
The Form Mapper	*Accuro Start Menu > Tools > Map Forms*

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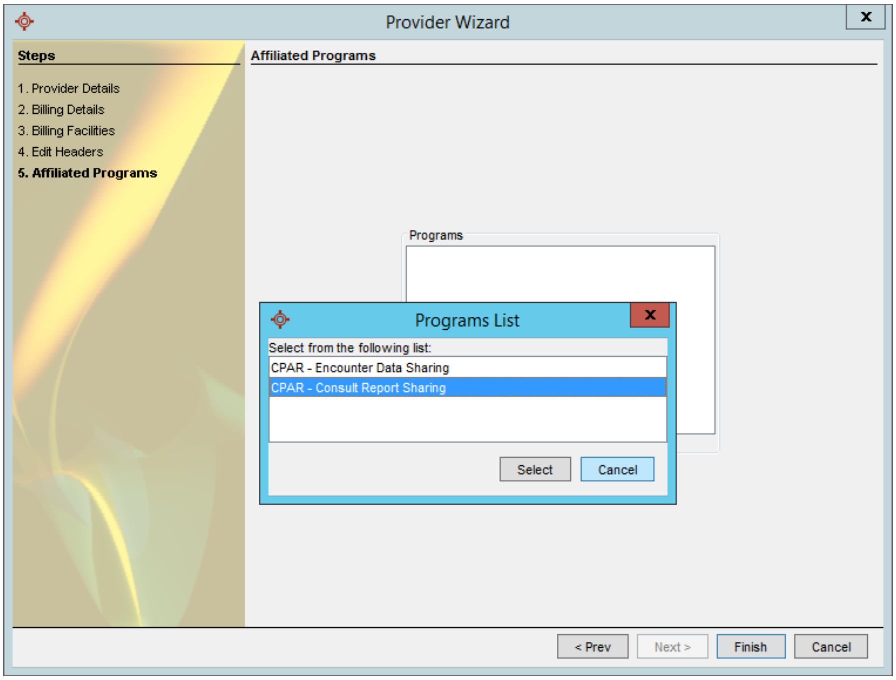
Step 1: Enable Consult Data Sharing for Providers

Complete the following steps for each Provider in the CII – Consult Data Sharing program:

1. Open the **Provider Wizard** (Accuro Start Menu> Tools> Configure Providers).
2. Select the **Provider** being enabled, then click the **Configure** button.
3. Select **Next** until you get to the '**Affiliated Programs**' page.
4. Click the **Add** button and select '**CPAR – Consult Report Sharing**' from the list.
5. Click **Finish** to save your changes.



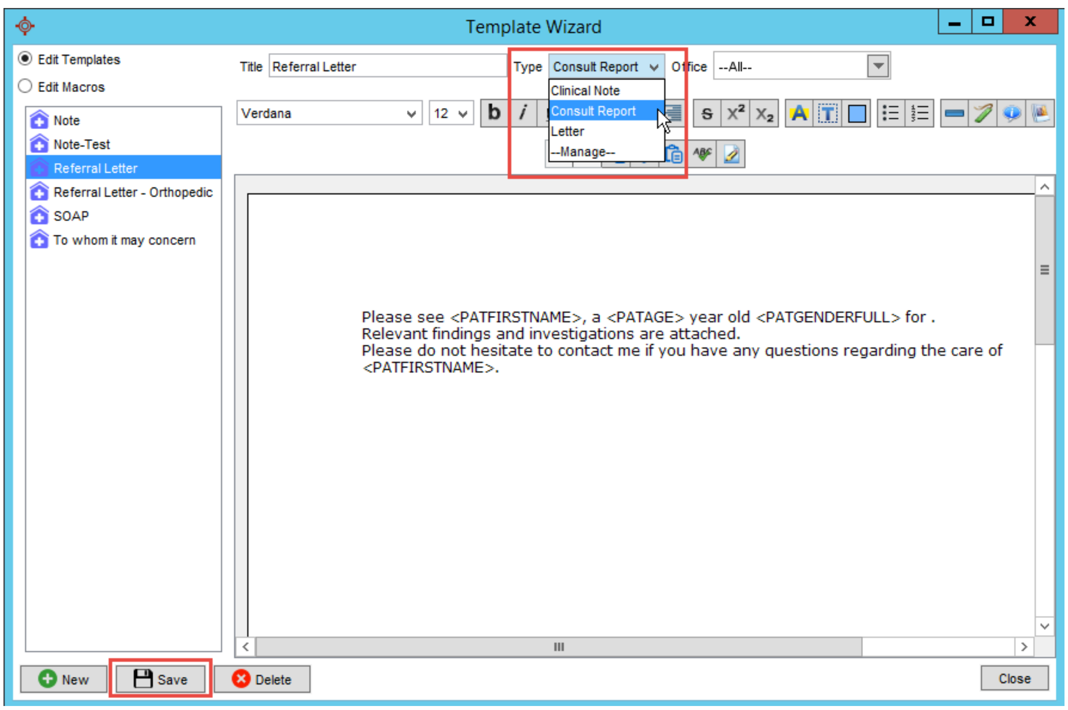
Step 2: Categorize Your Consult Letters for Data Sharing

Next, categorize your existing consultation letters with the '**Consult Report**' **Type** so that Accuro compiles those letters and automatically submits them to Netcare. Accuro periodically checks when reports are in use, then submits the data to Netcare.

Complete these steps for any new letters and notes added to Accuro in the future.

1. Open to **Template Wizard** (Accuro Start Menu > Tools > Template Wizard).
2. Select an existing **Consult Letter Template**.
3. In the **Type** dropdown, choose '**Consult Report**'
4. Click **Save**.

Repeat steps 2-4 for all Templates you're submitting to CII.



Note: For details about what information gets sent from Accuro to CII, see the 'CII & CPAR Accuro Mapping' document.

Data Sharing, Clinic Workflow

Workflow: Your Patients' Participation Rights

It is important to understand your patient's rights in choosing to share data with Alberta Netcare. Although you understand the benefits of the CII and CPAR initiative, your patients may appreciate an explanation and some coaching. Providing information to your patients and their rights is an essential part of success.

Your patients can elect to:

a) Share data to Alberta Netcare *with* the option to not share specific appointments or reports (more desired), or

b) Be made fully exempt from sending data to Alberta Netcare (less desired).

Shared (with option to 'Do Not Share' for specific appointments or specific reports) – More Desired
If a patient elects to share their data with Alberta Netcare, all CII Data is automatically shared from Accuro with no work from the clinic.

'Do Not Share' for a specific appointment

If a patient does not want the details of a specific appointment sent to CII, either the user scheduling the appointment or the physician (during the appointment) can request that specific appointment to not be shared. To prevent appointment information from being shared with CII:

1. In Accuro, navigate to the **Scheduler** section, then open an Appointment.
2. Enable the '**Do not share EMR or Consult data with CII/CPAR**' checkbox.

OR: Right click on the appointment and select, "Do not share EMR or Consult data with CII/CPAR"

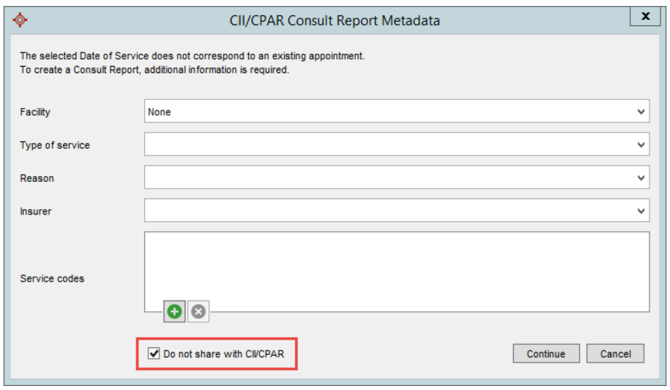
'Do Not Share' for a specific report

If a Consult Report is generated for a patient outside of a scheduled appointment, when the Provider saves the item to the patient's chart, they will be prompted with the "CII/ CPAR Consult Report Metadata" window.

Here, the physician can elect to either:

a. Fill in the fields provided and select 'Continue' to share the data with Netcare, or

b. (if the patient requests) do not fill in the provided fields, choose to "Do not share with CII/CPAR", and select 'Continue'



Note: Only the Facility field is required to submit this window, but you may want to submit as much data as possible to CII and CPAR.

Patient wants their data to be fully exempt from being sent to Alberta Netcare (less desired)

If a patient does **not** want their CII Consult data to be shared with Netcare at all, the Accuro user must:

1. Navigate to the **Patients** section, the open a Patient record.
2. In the Other tab, enable the '**Do not share EMR or Consult data with CII/CPAR**' checkbox.

TRAINING AND SUPPORT

Clinic Support

QHR Technologies can provide your clinic with support and user training. User training may be subject to a fee.

QHR Technologies Inc. Client Services
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Content Disclaimer

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