

OMD EMR-eReport Patient Reconciliation Toolkit

P&P (CIS) User Guide v4



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Exporting Rostered Patients Vaccination Summary (formerly Practice Level COVID-19 Vaccination Report) from Ontario Health eReport Portal (if not already downloaded)

1. Login at Ontario Health eReport portal with your ONE ID account:
<https://providers.cancercare.on.ca/>
2. Navigate to the Practice Level COVID-19 Vaccination Report in the eReport Portal.
3. Click on "Actions" menu.
4. Select "Export" option.
5. **Select "CSV (comma delimited)"** and save to a chosen location. **Note: Exporting in Excel format will not work with the provided Excel workbook due to formatting that is applied to the file.**
6. If you are a delegate and working with multiple clinicians, select Physician (CPSO#: LastName, FirstName) from the Physician Dropdown, click "View Report" and repeat steps 2-4 for all physicians. **Note:** Be sure to identify each Physician or CPSO# in the name of the download file when saving.
7. **NOTE: These files save under the name enrolledPatientsSummary.csv**

Download the OMD EMR-eReport Patient Vaccination Reconciliation Toolkit

If you have not downloaded the toolkit already, download the file from OMD website ontariomd.ca.

Download the following file:

OMD EMR-eReport Patient Vaccination Reconciliation Toolkit – Workbook – P&P (CIS)

- This is an Excel spreadsheet designed to be used with the COVaxON Rostered Patients Vaccination Summary report to identify patients requiring initial or secondary vaccination doses.

Save this file to your desktop. We will use this in later in the steps.

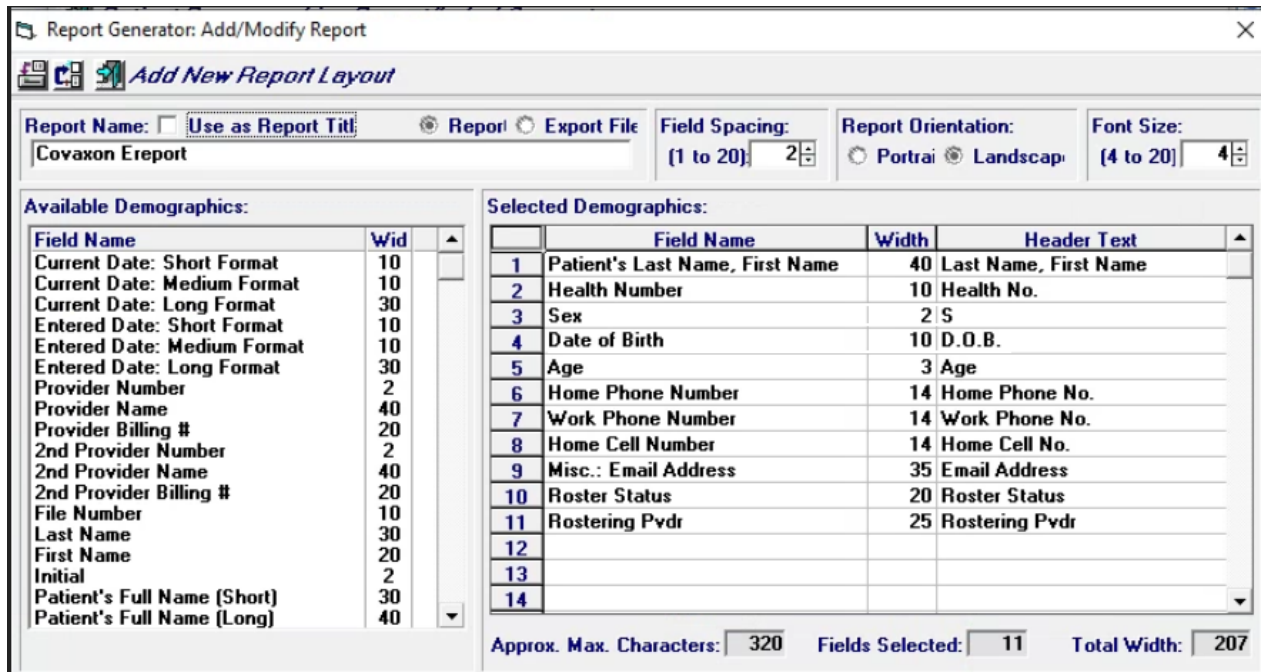
Creating a Patient List Report in your EMR

- 1) Enter the Registration Module
- 2) Select Reports from the top tool bar
- 3) From the drop down menu select Report Generator

Formatting the Report

- 4) From the pop up window select the Add New icon above the Available Report Layouts
- 5) Report Orientation should be changed to Landscape to ensure all information is included
- 6) Select the following criteria by double clicking on it:

- a. Patient's Last Name, First Name
- b. Health Number
- c. Date of Birth
- d. Sex
- e. Age
- f. Home Phone Number
- g. Work Phone Number
- h. Home Cell Number
- i. Email
- j. Roster Status
- k. Rostering Provider



Report Generator: Add/Modify Report

Add New Report Layout

Report Name: ☐ Use as Report Title ☒ Report ☐ Export File

Field Spacing: (1 to 20) 2

Report Orientation: ☐ Portrait ☒ Landscape

Font Size: (4 to 20) 4

Covaxon Ereport

Available Demographics:

Field Name	Width
Current Date: Short Format	10
Current Date: Medium Format	10
Current Date: Long Format	30
Entered Date: Short Format	10
Entered Date: Medium Format	10
Entered Date: Long Format	30
Provider Number	2
Provider Name	40
Provider Billing #	20
2nd Provider Number	2
2nd Provider Name	40
2nd Provider Billing #	20
File Number	10
Last Name	30
First Name	20
Initial	2
Patient's Full Name (Short)	30
Patient's Full Name (Long)	40

Selected Demographics:

	Field Name	Width	Header Text
1	Patient's Last Name, First Name	40	Last Name, First Name
2	Health Number	10	Health No.
3	Sex	2	S
4	Date of Birth	10	D.O.B.
5	Age	3	Age
6	Home Phone Number	14	Home Phone No.
7	Work Phone Number	14	Work Phone No.
8	Home Cell Number	14	Home Cell No.
9	Misc.: Email Address	35	Email Address
10	Roster Status	20	Roster Status
11	Rostering Pvdr	25	Rostering Pvdr
12			
13			
14			

Approx. Max. Characters: 320 Fields Selected: 11 Total Width: 207

- 7) Please note that you may need to change the number of characters in the width column to ensure all information can fit on the printout. Also note that these criteria are not listed in this order in CIS. Changing the font size will allow you to fit more characters in the report.
- 8) Name the Report "Covaxon Ereport" and select the Save icon

Generating the Report (Patient List)

1. Select/highlight the "Covaxon Ereport" from the Available Report Layouts
2. Click the Green checkmark icon, then click on the Select Patients by Criteria button
3. Select the following criteria:

- a. Surname: Enter A to Z
- b. Age: Enter 12 to 130 (130 is to be safe that you are not missing any patients)
- c. Sex: M & F should be checked off
- d. Select Active
- e. If you want to only select the Rostered Patients, under Select FHN Criteria, select Patient Enrolled under Roster Status.
- f. In the Providers section, select Reg. Pvdr and click on the provider's name from the list to select it.
- g. Output: Make sure Report is checked off so that you, can review it on the screen. (Optional if you want to view on screen)

Patient Demographics Report/Label Generator

Exit

Patient Demographics Report/Label Generator

Available Report Layouts:	Type	Available Label Layouts:	Copies
Archived Patients	Report	*ECG Label	1
Babys	Report	*Lab Label	1
CB Patients	Report	*Name & DOB	1
Charts	Export	*Specimen Label	1
Available & Export	Report	*Tube Label	1

Patient Selection Criteria: [More...](#) [Clear Criteria](#)

Surname: [A] To [Z] Age: [12] To [130] In Year: [] Birth Month: []

Registered Between: [] & [] Privacy Directive: [] Rostered: []

Health #: [] Billing: [] Last Billed Between: [] & []

Sex: ☒ M ☒ F Status: ☐ Transient ☒ Active ☐ Deleted ☐ Guarantor FHN: [Set FHN Selection Criteria](#)


Tags: ☐ VIP ☐ Mail Out 2 ☐ Out of FHN Area ☐ Mail Out 4 ☐ Mail Out 1 ☐ Deceased

Providers: ☒ Reg. Pvdr ☐ Billing Pvdr ☐ Roster Pvdr
☒ 1st ☒ 2nd ☐ 2nd Blank
 No. OHIP: [] Provider Name: []

☒ Order By Provider 0 selected

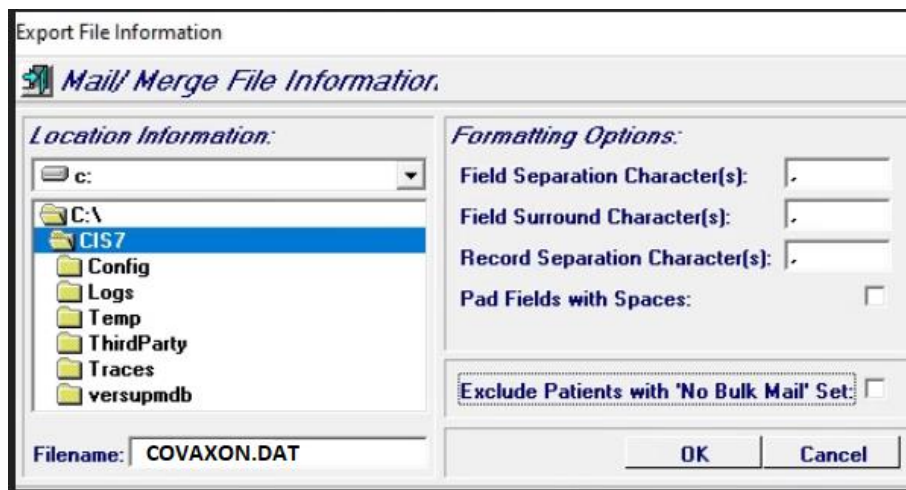
Flags: ☐ Red ☐ Blue ☐ Green ☐ White

Sort Order: ☐ Sort Item ☒ Patient Surname, First Name

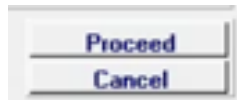
Output: ☐ Report ☐ Mailing Labels ☒ Export File 

[Proceed](#) [Cancel](#)

- h. Output: Make sure Export File is checked. This will display the Export File Information pop up:
 - i. Filename: name the report COVAXON.CSV
 - ii. Formatting Options:
 1. Field separation characters: comma
 2. Field surround characters: leave blank
 3. Record Separation Characters: comma
 4. Pad Field with Spaces: leave blank
 5. Select the OK button



4. Then click on the Proceed button



5. Once the report is completed it will be saved to the CIS folder on the computer you are working on the C: CIS7 (usually default)
6. Search for the file named COVAXON.CSV

Remember to delete or encrypt any files on your desktop that contain PHI when you finish working with them.

Open the OMD EMR-eReport Patient Reconciliation Workbook

Double click on the OMD EMR-eReport Patient Reconciliation Workbook Excel file to open.

In the workbook there are 6 tabs.

Toolkit Instructions

Instructions for downloading the eReport, exporting an EMR Patient List and working with the data in the excel workbook.

eReport Data

Worksheet where Rostered Patients Vaccination Summary eReport data should be pasted.

Patient List Export

Worksheet where Patient List export data should be pasted. Vaccination record matches between the Patient List and the eReport data also displays on this worksheet.

Support for Patient Outreach

Worksheet with access links to resources regarding communicating with patients, and support.

Resources, Tools, Support

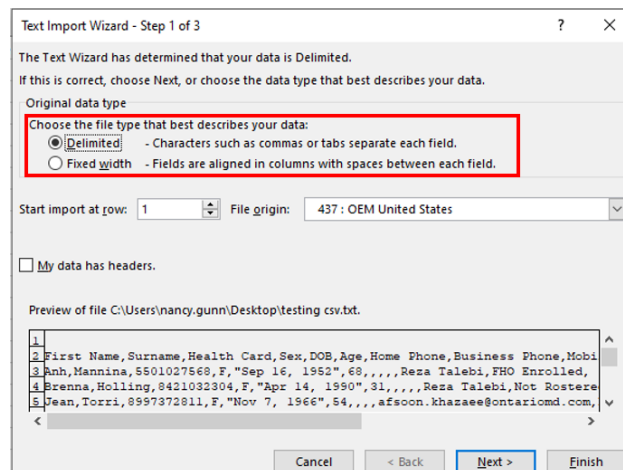
Worksheet with access links to resources for building vaccine confidence.

ONE® ID Information

Worksheet containing information and links regarding ONE® ID Login and Registration.

Copy and Paste eReport Rostered Patients Vaccination Summary Data into the Excel Workbook.

1. Open the saved eReport with Excel by launching a blank workbook in Excel.
2. Click File > Open > Browse.
3. In the dialog window that opens, to the right of 'File Name', click the dropdown field and select 'All Files'.
4. Navigate to where the “enrolledPatientSummary” CSV file is saved, then single click on the file to select the file.
5. Click Open.
6. A Text Wizard assistant will open to help convert the file to an Excel file.
 - a. In the Text Wizard Step 1 window, ensure ‘Delimited’ is selected and click Next.



Text Import Wizard - Step 1 of 3

The Text Wizard has determined that your data is Delimited.
If this is correct, choose Next, or choose the data type that best describes your data.

Original data type

Choose the file type that best describes your data:

☒ Delimited - Characters such as commas or tabs separate each field.

☐ Fixed width - Fields are aligned in columns with spaces between each field.

Start import at row: 1 File origin: 437 : OEM United States

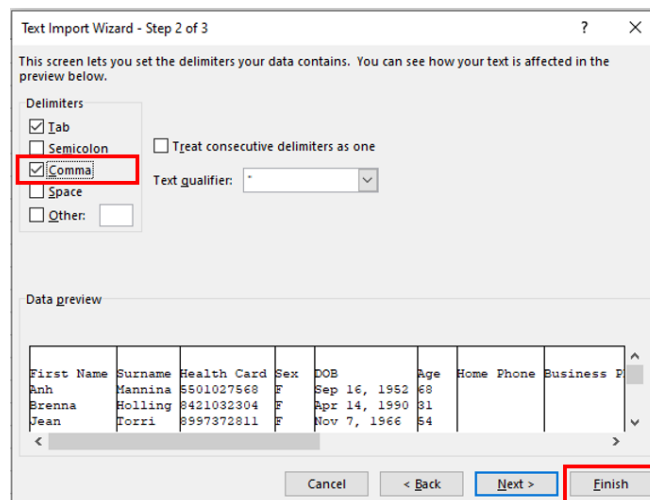
☐ My data has headers.

Preview of file C:\Users\nancy.gunn\Desktop\testing.csv.txt.

1
2 First Name,Surname,Health Card,Sex,DOB,Age,Home Phone,Business Phone,Mobi
3 Anh,Mannina,5501027568,F,"Sep 16, 1952",68,,,,,Reza Talebi,FHO Enrolled,
4 Brenna,Holling,8421032304,F,"Apr 14, 1990",31,,,,,Reza Talebi,Not Rostere
5 Jean,Torri,8997372811,F,"Nov 7, 1966",54,,,,,afsoon.khazae@ontariomd.com,

Cancel < Back Next > Finish

- b. In Step 2 ensure the Comma checkbox is selected under 'Delimiters' and check the Data Preview window to ensure data shows in individual columns.



Text Import Wizard - Step 2 of 3

This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below.

Delimiters

☒ Tab

☐ Semicolon

☒ Comma

☐ Space

☐ Other:

☐ Treat consecutive delimiters as one

Text qualifier:

Data preview

First Name	Surname	Health Card	Sex	DOB	Age	Home Phone	Business P
Anh	Mannina	5501027568	M	Sep 16, 1952	68		
Brenna	Holling	8421032304	F	Apr 14, 1990	31		
Jean	Torri	8997372811	F	Nov 7, 1966	54		

Cancel < Back Next > Finish

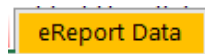
- c. Click Finish.

7. From the "enrolledPatientSummary" CSV file, downloaded from Ontario Health, copy all data, excluding headers. **ONLY select all data contained in columns A to K.**

Tip: To quickly select all data, click on the first cell and while holding down SHIFT key, click on the last cell containing data.

NOTE: Copy and Paste fields using "Control C" + "Control V" functionalities. Do not paste as special values or text as the format could change.

8. Open the "OMD EMR-eReport Patient Vaccination Reconciliation Toolkit – Workbook – P&P(CIS)" and navigate to the eReport Data tab.



9. Paste all copied data into the eReport Data tab.

	A	B	C	D	E	F	G	H	I	J	K	L
1	New	Surname	Given Name	HIN	Date of Birth	Age	Vaccinations on Record	Dose	Administration Date	Vaccine	Service Delivery Location	Symptoms
2												
3												
4												
5												
6												
7												
8												
9												
10												
11												

Paste eReport Data here.

Copy and Paste "Patient List" Data generated from your EMR into the Excel Workbook.

1. In Excel, Click File> Open> Browse.
2. Open the CIS folder on the C:CIS7

patient. Non-rostered patients should be contacted directly to gather vaccination information.

6. Use this list to identify patients requiring initial or secondary doses. See the Resources, Tools, Support tab for more resources on communicating with your patients, billing, and support.

Resources, Tools and Support

Support for Patient Outreach

Thank you for helping our patients receive the COVID-19 vaccine, your efforts in reaching out to our patients is valued and will help end the pandemic. As you know many of our patients have been able to schedule their vaccinations. However, there are some patients, around 10-15%, who are likely to accept an offer of vaccination if we reach out to them. There are other patients who may have questions about whether this vaccine is right for them. This is why your role is so important to the vaccination effort as you can help patients who will accept an invitation of vaccination and connect those patients with questions to their family physician who can make a personal recommendation. It is important to note that not all patients are open to receiving the COVID vaccine and that their choice to decline this offer is accepted.

Ontario Health is supporting us with a list of patients who have received the COVID vaccine. Please use the tools provided in the toolkit that OntarioMD has created with them to find your unvaccinated patients and contact those 12 years and older. Please note some patients may be listed as unvaccinated who have recently received the vaccine.

In addition to local vaccine clinic popups and primary care offices that are offering COVID-19 vaccine, patients can be directed to the Provincial Government booking site <https://covid-19.ontario.ca/book-vaccine/> or pharmacy locations that are offering vaccination <https://covid-19.ontario.ca/vaccine-locations>

For patients who need a telephone number to assist with booking, they can call The Provincial Vaccine Information Line at 1-888-999-6488

Creating Key Messages

Creating a script that is customized for each physician practice is encouraged so that there is an agreement around what the outreach communications will include. The following key messages have been provided as sample messaging.

What patients need to hear	What patients need to know
<ul style="list-style-type: none"> Vaccinating for COVID-19 is a personal choice. 	<ul style="list-style-type: none"> They are eligible for the first dose of the COVID vaccine.

<ul style="list-style-type: none"> • Being unsure about the decision to vaccinate is normal and that the family physician and team are here to help you. • The family physician and team are a trusted source of information. • The family physician and team have been educating themselves on the COVID-19 vaccine. • The family physician and team are specialists in you. They know your history, family, circumstances and are able to make recommendations for you about COVID vaccine. 	<ul style="list-style-type: none"> • If they are ready to vaccinate, booking an appointment is through: The provincial booking website, through a participating pharmacy, or (in some cases) through a family physician office. • If they have questions about the vaccine that may be able to answer common questions about the vaccine. • If they have concerns or would like the physician to help them make a decision about the vaccine, an appointment can be booked.
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Common questions patients may ask.

It is helpful to review the list of common questions before outreaching to patients to prepare yourself to respond. The Centre for Effective Practice [website](#) maintains a list of frequently asked questions and these are updated regularly. It is important to remember that if you are not sure about a response to a patient question that it is ok to say you don't know that answer and either follow up later or suggest having this discussion with their family physician.

Documenting the Interaction

Recording the response to the patient outreach (telephone call) is an important step so the family physician and other team members can support any follow up conversations. Each clinic may have a different process for documenting the outreach and many will use their Electronic Medical Record to do so. **It is recommended that, at a minimum, the status of the conversation is recorded in a standardized manner.**

- **COVID Vaccine Outreach Declined** – means that the patient has declined to receive the vaccine and declined to talk to the family physician about the decision.
- **COVID Vaccine Outreach Accepted** – means the patient has accepted the offer to be vaccinated and is booking an appointment.
- **COVID Vaccine Outreach Hesitant** – means the patient has declined to receive the vaccine but has accepted an appointment to speak to the physician about concerns.
- **COVID Vaccine Outreach Incomplete** – means that the outreach occurred but resulted in voicemail or unanswered phone.

Sample Scripts

The following sample script has been created using the above key messages and may be used or adapted.

Voicemail

Hi, this is <name> calling for <Patient name>. I am calling from Dr. <name> office. Dr. <name> thinks the COVID vaccination is important for your health has asked me to reach out to you to offer any assistance in helping you get your COVID vaccination. You are eligible for your vaccination now and you can book

through the Provincial Government booking site, a local clinic or a local pharmacy. If you have any questions about whether this vaccine is right for you, please call our office at <### ###> and we can schedule a telephone call with Dr. <name>. If you have already received or scheduled your vaccination, there is no need to call us back. Have a good day.

If the Telephone answered

Hi, this is <name> calling may I speak to <Patient name>. I am calling from Dr. <name> office. Dr. <name> thinks the COVID vaccination is important for your health has asked me to reach out to you to offer any assistance in helping you get your COVID vaccination. Do you have a few minutes to talk about this?

If there is a Negative Response

That is fine. Dr. <name> just wanted you to know that you are eligible for the vaccine and that if you had any questions about whether the vaccine was right for you that we could schedule an appointment to discuss. Please feel free to call us if you need any support.

If there is a Positive Response

That is great, we have been thinking a lot about the vaccine and its importance in protecting our patients. Do you have any questions about the vaccine that I can help you with?

<[Respond to questions about how to book an appointment](#); [address any mis-information](#); schedule appointment with physician for specific recommendation>

<Record outcome of call in the EMR – Left a message, First/Second dose completed, First/Second dose booked, Declines offer, follow up appointment booked or unable to contact>

Resources, Tools and Support for Building Vaccine Confidence

- 1. COVID-19 vaccination in Canada: an educational series for primary care professionals (Ontario College of Family Physicians & Dept of Family & Community Medicine) - Eligible for Mainpro+® credits.**

<https://www.dfcm.utoronto.ca/covid19-vaccination-modules>

Learn How to:

- Communicate how the approved vaccines work, their safety and efficacy, and who should receive them.
- Counsel special populations on the benefits and risks of the vaccine.
- Employ evidence-informed strategies to build vaccine confidence among patients and address common concerns.

- 2. Primary Care COVID-19 Immunization Toolkit** - Developed through the [University of British Columbia's Primary Care Innovation Support Unit](#) and supported by College of Family Physicians of Canada, Centre for Effective Practice and 19tozero.ca

<https://covidtoolkit.ca>

Learn How to:

- Engage Vaccine Hesitant Patients

- Plan a vaccine clinic for your office, should you choose to do so.

3. Centre for Effective Practice COVID-19 Vaccination Micro-site

<https://tools.cep.health/tool/covid-19-vaccines/>

- Vaccines at a glance
- Patient resources (including Multilingual information, newsletter and social media content)
- Ensuring patient confidence in vaccines > COVID-19 vaccines for children
- Emerging evidence: COVID-19 vaccines for children

4. Vaccine Hesitancy Guide – Developed by the University of Calgary’s School of Public Policy

<https://www.vhguide.ca>

Learn How to:

- Have better clinical conversations about vaccines.
- Differentiate common types of vaccine hesitancy that primary care clinicians may see.
- Browse through these types to help identify the sources of your patients’ hesitancy and find advice and resources on how to address them.

5. Ontario Medical Association Webinar on Vaccine Confidence Slaying the Myths and Spreading the Facts

<https://www.youtube.com/watch?v=rBldXEEZH9Q>

ONE® ID Login and Registration

- **What is ONE® ID and why is Ontario Health eReport COVaxON report using ONE® ID?**

ONE® ID is Ontario’s digital identity and access management service with robust systems and processes that allow health care providers to securely access electronic health care applications using a single electronic credential. ONE® ID’s identity validation process and security safeguards ensure that only authorized professionals can gain access to Personal Health Information (PHI). Upon authorization, your ONE® ID credentials can help you gain access to a growing variety of other provincial data sources and reports including ConnectingOntario, ClinicalViewer, cSWO ClinicalConnect, Ontario Telemedicine Network (OTN), Ontario Lab Information System (OLIS), and Panorama.

- **How do I sign up for ONE® ID?**

For College of Physicians and Surgeons of Ontario (CPSO) members, the primary method to obtain a new ONE® ID account is by logging in through the CPSO Portal. If you do not yet have a ONE® ID account, log in to the CPSO Members Portal to self-register for a ONE® ID account here: <https://my.cpsso.on.ca/>.

For instructions on completing your ONE® ID self-registration, refer to the [ONE® ID CPSO Registration Guide](#).

- **I forgot my ONE® ID Login ID. What should I do?**

If you have lost or forgotten your ONE® ID Login ID, you can follow these steps:

1. Go to the ONE® ID login page: <https://oneid.ehealthontario.ca/login>.
 2. Select the "Forgot Login ID" link.
 3. Enter your first name, last name, and date of birth.
 4. Next, you will be prompted to verify your identity by answering 2 of 3 online challenge questions selected during your registration. **Note:** Answers are case-sensitive.
 5. Your Login ID will be displayed. Click "Proceed to Login" to log in to your account.
- Note:** If you require further assistance with accessing your ONE® ID account, please call the Ontario Health Digital Support Desk at 1-866-250-1554 or email OH-DS_servicedesk@ontariohealth.ca for assistance.

- **I forgot my password or it is expired. How do I reset my password?**

If you have lost or forgotten your temporary password, or it has expired, you can follow these steps:

1. Go to the ONE® ID login page: <https://oneid.ehealthontario.ca/login>.
 2. Select the "Forgot Password" link.
 3. Enter your Login ID (e.g., <mailto:firstname.lastname@oneid.ca>) and date of birth.
 4. Next, you will be prompted to verify your identity by answering 2 of 3 online challenge questions selected during your registration. **Note:** Answers are case-sensitive.
 5. Create a new password.
- Note:** If you require further assistance with accessing your ONE® ID account, please call the Ontario Health Digital Support Desk at 1-866-250-1554 or email OH-DS_servicedesk@ontariohealth.ca for assistance.

- **How do I update my ONE® ID profile?**

To maintain your ONE® ID account and keep your information current, you can login to <https://oneid.ehealthontario.ca> to access your My Profile page and update your information.

In the top panel of the My Profile page, your Preferred and Legal First and Last Names are displayed, along with your ONE® ID Login ID, Gender and Date of Birth. These fields cannot be modified by you. If any of the information is incorrect or requires updating, please contact your Local Registration Authority (LRA) or the Ontario Health Digital Support Desk.

You can, however, change your own contact email address, phone number and preferred language, at any time.

Authorizing a Delegate

- **What is a delegate and what are the advantages of authorizing a delegate?**

A delegate is a member of your primary care team (e.g., a nurse, office manager or clinic staff member) who is authorized to access your COVaxON Report. A delegate is set up with their own unique ONE®ID account and is given permission from a physician to download and view the report. By authorizing delegates, the tasks involved can be shared among team members.

- **As a physician, how can I authorize a clinical staff member or office administrator to access my COVaxON Report?**

Delegates must first be registered with Ontario Health by sending an email to ONEIDBusinessSupport@ehealthontario.on.ca. Registration appointments will be scheduled based on location and/or the date of your request.

To appoint a delegate, visit eHealth Ontario, log in, select "Manage your delegates" located at the bottom of the screen, and then search for the delegate's account by their login ID. For more assistance, please see the video on 'Appointing a Delegate in ONE® ID' located under the 'Support Videos and Info' tab.

The COVaxON Report includes patient personal health information. As a health information custodian, you have an obligation under the privacy law to protect that information from unauthorized collection, use and disclosure. This includes ensuring timely revocation of access to the report by people who should no longer be your delegates (e.g., they no longer work in your office).