OMD EMR-eReport Patient Reconciliation Toolkit

OSCAR User Guide v4

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Contents

Files in the Toolkit

OMD EMR-eReport Patient Vaccination Reconciliation Toolkit – Workbook - OSCAR
- 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.

OMD eReport Patient Vaccination Reconciliation – Patient List
- This is a Report by Template Search that needs to be imported to your OSCAR EMR to create a list of active patients, 12 years and older.

Exporting Rostered Patients Vaccination Summary (formerly Practice Level COVID-19 Vaccination Report) from Ontario Health eReport Portal

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.

Import the Report by Template and Export patient list from EMR.

Using "OMD eReport Patient Vaccination Reconciliation - Patient List" Report by Template to export patient list from EMR (Searches for active patients by provider and age.)

1. In your OSCAR EMR, click on Administration.
2. Click on Reports, then Report by Template.
3. Click on Add Template.

4. Select the "OMD EMR-eReport Patient Reconciliation - Patient List" Report by Template file from its saved location.
5. Click Upload & Add.
6. Find the Report by Template in your main list and select the appropriate physician, age ranges (if applicable) and sorting options.
7. Click Run.
8. Select Export to CSV.

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

OMD EMR-eReport Patient Reconciliation Workbook

Legend of Worksheets within the Workbook

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.

Resources, Tools, Support

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

ONE® ID Information

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

Working with the Worksheets and Data

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 "Rostered Patients Vaccination Summary" 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.
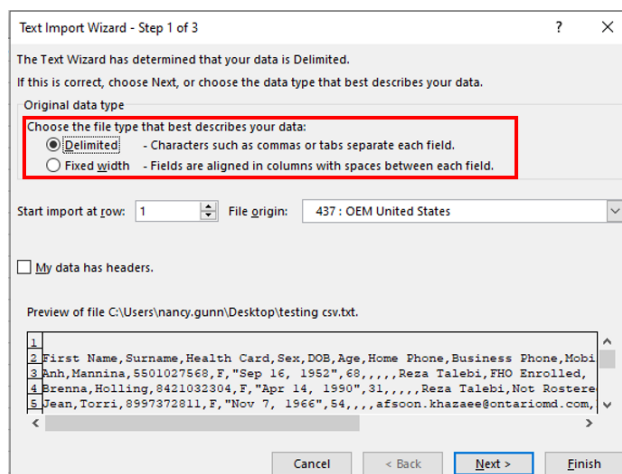
   b. In Step 2 ensure the Comma checkbox is selected under 'Delimiters' and click Finish.
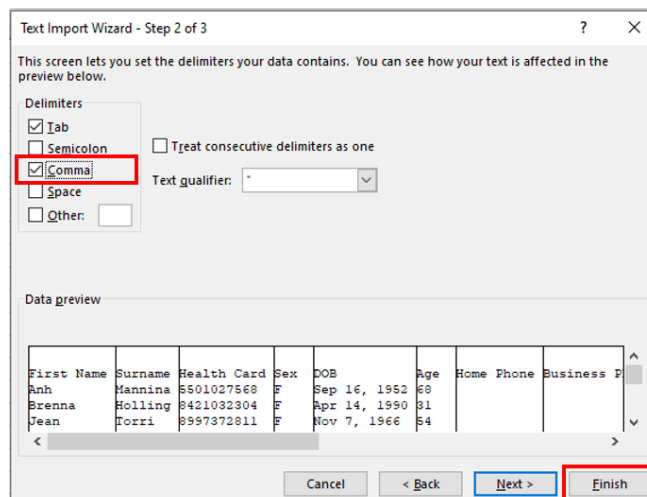
7. Within the "Rostered Patients Vaccination Summary" CSV file, downloaded from Ontario Health, copy all data, excluding headers, from the report. **Copy and Paste fields using "Control C" + "Control V" functionalities. Do not paste as special values or text as the format could change.**

8. Double click the "OMD EMR-eReport Patient Vaccination Reconciliation Toolkit – Workbook" for OSCAR and navigate to the eReport Data tab.

eReport Data

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.

10. You need to now copy your "Patient List" Data generated from your EMR. The next steps will walk through opening that text/csv file.

11. Click File > Open > Browse.

12. In the dialog window that opens, to the right of 'File Name', click the dropdown field and select 'All Files'.

13. Navigate to where the "Patient List" text file generated from your EMR is saved, then single click on the file to select the file.

14. Click Open.

15. A Text Wizard assistant will open to help convert the file to an Excel file. Follow the same steps as outlined in step 6 (a) and (b) above.

16. Copy all data, excluding headers, from the "Patient List" generated from your EMR and paste into the Patient List Export tab under the GREEN Headers. **Copy and Paste fields using "Control C" + "Control V" functionalities. Do not paste as special values or text as the format could change.**

				Patient List Data Extracted from OSCAR								Data from Practice Level COVID-19 Vaccination Report		
Last Name	First Name	HIN	DOB	Age	Sex	Cell Phone	Home Phone	Work Phone	Email Address	Status	Roster Status	Provider	Vaccine	Administration Date	Dose
													Patient is Not Rostered to You in eReport	Patient is Not Roster	Patie
													Patient is Not Rostered to You in eReport	Patient is Not Roster	Patie
													Patient is Not Rostered to You in eReport	Patient is Not Roster	Patie
													Patient is Not Rostered to You in eReport	Patient is Not Roster	Patie
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													Patient is Not Rostered to You in eReport	Patient is Not Roster	Patie

Paste Patient List Data here.

17. Once all data has been inserted, stay on the Patient List Export tab to reconcile your patient list. (You should see eReport data auto-populate on the right side of the spreadsheet once you have pasted the EMR patient data into the Patient List Export tab.)

18. If your patient received a vaccine, the most recent vaccination information will be listed on the right side of the spreadsheet. (Under the YELLOW headers)

19. You will be able to view the specific Vaccine Received, Date Administered and Dose Number.

20. If the patient has received 3 doses, the row will turn blue. If the patient has received 2 doses, the row will turn green. If the patient has received 1 dose, the row will turn yellow. Rows of rostered patients in the eReport without any dosage reported will turn red and display 'Vaccination Record Not Found'. Rows of non-rostered patients will remain white and display 'Patient is Not Rostered to You in eReport'.

						Patient List Data Extracted from OSCAR							Data from Practice Level COVID-19 Vaccination Report		
Last Name	First Name	HIN	DOB	Age	Sex	Cell Phone	Home Phone	Work Phone	Email Address	Status	Roster Status	Provider	Vaccine	Adminstration Date	Dose
Abdulmateen	Wilfred	5501027568	1955-05-13	66	M					AC	RO	John, Smith	PFIZER-BIONTECH COVID-19 VACCINE mRNA	17-Dec-20	1
Ahles	Robbie	8421032304	1952-01-14	69	M					AC	RO	John, Smith	PFIZER-BIONTECH COVID-19 VACCINE mRNA	30-Jun-21	2
Aken	Carmel	8997372811	1955-12-07	65	F					AC	NR	John, Smith	Vaccination Record Not Found	Vaccination Record N	Vaccin
Akkerman	Raquel	1000547354	1964-11-15	56	F					AC	RO	John, Smith	PFIZER-BIONTECH COVID-19 VACCINE mRNA	07-Jan-21	2
ANDA	RAVI	8039583201	1955-07-22	66	M		905-			AC	RO	John, Smith	MODERNA COVID-19 VACCINE mRNA	07-Jan-21	2
Antonetty	Erlinda	1804703536	1957-07-09	64	F	289-098-9876			afsoon.khazaee@ontariomd.cc	AC	RO	John, Smith	PFIZER-BIONTECH COVID-19 VACCINE mRNA	07-Jan-21	2
Appelgate	Jaqueline	5428512586	1951-09-25	69	F					AC	RO	John, Smith	Patient is Not Rostered to You in eReport	Patient is Not Roster	Patien
Babst	Viola	2187484098	1986-06-23	35	F					AC	RO	John, Smith	MODERNA COVID-19 VACCINE mRNA	17-Dec-20	3
COOPER	JANET	1472862229	1979-01-01	42	F		905-			AC	FS	John, Smith	Patient is Not Rostered to You in eReport	Patient is Not Roster	Patien
dashboardMB	MELISSA	8784693418	2001-06-15	20	F		905-788-1492		melissagbastin@gmail.com	AC		John, Smith	Patient is Not Rostered to You in eReport	Patient is Not Roster	Patien
DASHI	OLIVER	1344071020	1966-11-11	54	M		905-			AC	RO	John, Smith	PFIZER-BIONTECH COVID-19 VACCINE mRNA	30-Jun-21	3
DASHI	CAROL	4567891017	1967-01-01	54	F		905-			AC	RO	John, Smith	PFIZER-BIONTECH COVID-19 VACCINE mRNA	08-Jan-21	2
DASHI	NORA	1234567897	1965-05-15	56	F		905-			AC	RO	John, Smith	MODERNA COVID-19 VACCINE mRNA	07-Jan-21	2
DIABETES	DIANA	7458379018	1965-10-13	55	F					AC	RO	John, Smith	PFIZER-BIONTECH COVID-19 VACCINE mRNA	17-Dec-20	1
ELDER	JUNE	2118692578	1952-06-15	69	F		905-			AC	RO	John, Smith	PFIZER-BIONTECH COVID-19 VACCINE mRNA	30-Jun-21	3
ENGLISH	JOHNY	2029591408	1969-01-16	52	M		905-			AC	RO	John, Smith	Vaccination Record Not Found	Vaccination Record N	Vaccin

21. **Note: Information from the Ontario Health Rostered Patients Vaccination Summary report contains vaccination information on ONLY those patients rostered to you.** If your patient is NOT rostered to you, you will not see any vaccination information for this patient. Non-rostered patients should be contacted directly to gather vaccination information.

22. 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
• Vaccinating for COVID-19 is a personal choice. • 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.	• They are eligible for the first dose of the COVID vaccine. • 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.

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=rBIdXEEZH9Q

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.cpso.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).