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Ministry of Health Services

CDM Toolkit User Guide

How to Use the CDM Toolkit

A Reference Guide for End Users

August 2004
Version 1.0

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Introduction

The Chronic Disease Management (CDM) Toolkit is a secure online web application. It is used to monitor patients that have a chronic disease or are at risk of obtaining one.

In order to use the CDM Toolkit, you will need three security components: a *digital certificate*, a *username* and a *password*. A certificate is like a digital fingerprint for your computer, it makes your computer unique. The certificates that are being used with the toolkit identify what organization you are from (Dr. Smith's Medical Office). The username and password ensure that you are who you say you are (Jane Doe for Dr. Smith's Medical Office). This User Guide will show how to obtain all three of these components, and serve as a reference guide for using the Toolkit.

Before you begin

System Requirements

Your computer should meet some specifications in order to run the CDM Toolkit efficiently. If the computer being used for the CDM Toolkit is lacking in one or more of these requirements, you may experience technical difficulties with the system. If you do not understand these requirements, please ask your local computer technician whether your computer is able to run the program before you proceed.

You should have:

- Windows 98 or better
- Internet access (High Speed is Recommended)
- Current Web Browser (Internet Explorer v5.5 or higher is recommended)
- Adobe Acrobat Reader v5.01 (You can download the latest version at http://www.adobe.com/products/acrobat/readstep2.html)
- 800 X 600 or higher resolution screen (1024 X 768 is best)
- A printer
- 1 formatted floppy disk

Getting Your Certificate/Username

To apply for the certificate as a Physician, fill out an on-line form at https://healthnet.hnet.bc.ca/has/regagree/4614fil.pdf.

Five to 10 days after the applications have been sent in, an Email with the certificate will be sent to the physician. *You will need to contact the MoH helpdesk* (250) 952-1234 to *receive the certificate password (this is different than your login password*).

Note: When you apply for a certificate, the physician's patients will automatically be populated from the registry. If you do NOT want your list of patients to be generated automatically, call the MoH helpdesk (250) 952-1234 *and your list will be removed, leaving the Toolkits' Patient List empty.*

If for some reason your Patient List is empty and you have not requested to have your Patient List emptied, call the MoH helpdesk (250) 952-1234 *and request them to fill your Patient List.*

Note: Every computer that you will use to access the CDM site will need the certificate installed on it.

For a Physician's employee (delegate) to apply for a user ID, a physician would need to email hlth.hnetconnection@gems1.gov.bc.ca with the request. The email request certifies that the physician requires the employee to access the toolkit. Physicians should only request access for those who would normally work with patient files.
Include information such as:

	Examples:
Organization Number:	1234
Organization Name:	Dr. Smith's Medical Office
User's Full Name:	Doe, Jane
User's Telephone Number:	(250) 555 1234
User's E-Mail Address:	applicant.email@shaw.ca
Web service required/SPG:	Chronic Disease Management (CDM) Toolkit

Setup – Installing the Digital Certificate

To install the Certificate:

1)
Open the Email with the certificate attachment and double click or open the attachment. A dialogue box will open asking to save the file or open it.

2)
Choose to save the file. In the next dialogue box click the drop down box next to *"Save in*:" and choose to save the file to a floppy disk. (This is usually the A: drive)

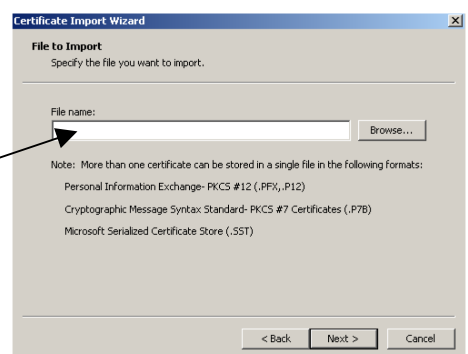
Note: When you have saved the certificate to the floppy drive, make sure to delete the original certificate in your email. Please, keep this disk safe to prevent fraud and theft.

Note: Follow Steps 3 Through 13 on each computer that will be using the CDM Tool Kit.

3)
Insert the floppy disk into the computer that needs access to the CDM Toolkit and, in a Windows Explorer window, browse to the certificate file on the disk.

4)
Open the certificate file by double-clicking on it to start the Certificate Import Wizard.

5)
Click on the **Next >** button. On the **File to Import** screen, the file name should contain the path to your certificate file.
eg. "A:\ 00005555_Dr.Smith_01.pfx"

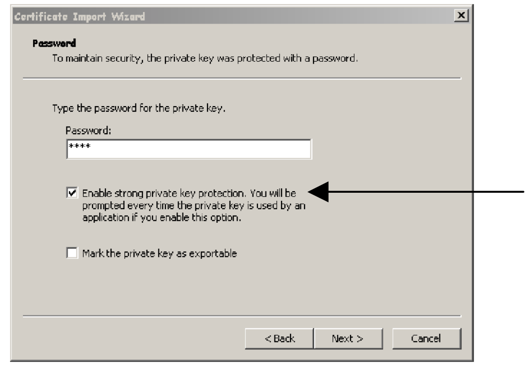


6)
Click the **Next >** button.

7)
The next screen asks for the certificate password. An authorized representative must call the

MoH Helpdesk @ 1(250) 952-1234

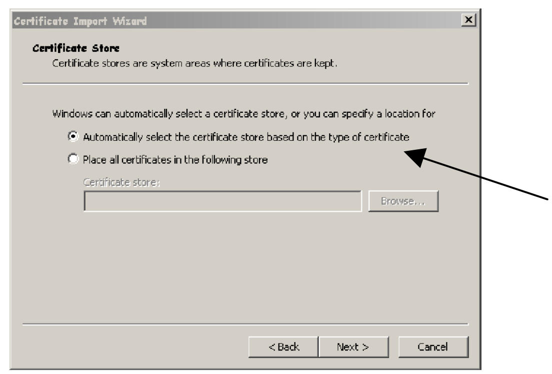
for the certificate password. Enter your password and check the box that begins "**Enable strong private key protection**".



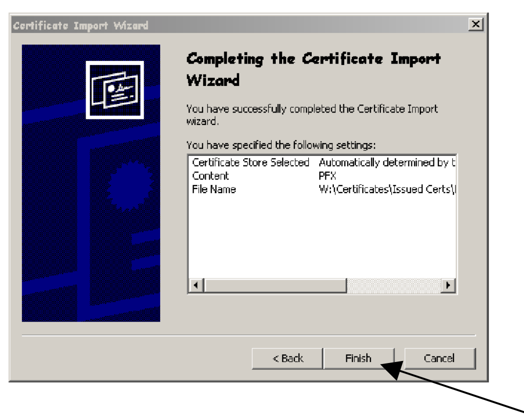
IMPORTANT NOTE: *Do **NOT** select "Mark the private key as exportable".*

8)
Click the **Next >** button.

9)
In the next window (Certificate Store) make sure that "**Automatically select the certificate store based on the type of certificate**" is selected.



10)
Click the **Finish** button in the Wizard window.



11)
The next window will set the security of the certificate. By default, it should be set to Medium. If not Click on the **Set Security Level…** button to select the Medium security level.

12)
Click the **OK** button.

13)
A pop up window will appear congratulating you on the installation.
Click on the **OK** button.

You are now able to sign in to the Ministry's Secure Website.

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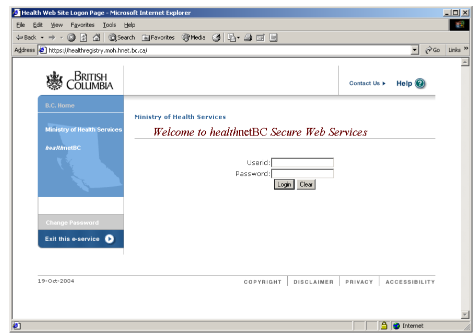
Signing in for the First Time

1)
Open your Web Browser.

2)
Go to the address bar in your web browser and type in
https://healthregistry.moh.hnet.bc.ca/
then press *Enter*.



Note: ***It may be useful to set this site as one of your <u>Favorites</u> for easy access.***

> *To do this in Internet Explorer, click on the Favorites menu, and then click on* ***Add to Favorites****. A pop up window will appear. You can choose a title (CDM Toolkit) and where to save the web site link; then click* ***OK****. To see your favorites, just click on the* ***Favorites*** *menu and the link will be in the menu box under the title you selected.*

3)
A few security popup windows will appear. Agree and proceed to the web site.

4)
Type your user ID and Password in the given text boxes. If you do not know the password, call the Ministry of Health Helpdesk @ 1 (250) 952-1234.

5)
Click on the **Login** button.

6)
You will now be prompted to change your password. Choose a password that is meaningful so you won't forget it, but do no choose a password that is easily guessed. Follow the online instructions.

Important Note: *Do not share your password with anyone. If another person requires access to the CDM Toolkit, have them register as well.*

Note: While in the CDM site do not press the back button in your browser. This will cause errors and may corrupt data. Please use the on-site navigation buttons.

How To…

You can also view the online help for many of the functions of the CDM Toolkit. You will find the help link on the top right of the screen after you have logged into the System.

Patient Management

Sharing Patient Information with Others

How do I add a delegate to manage my patient information/ share my patient information with another Clinician?

1. In the left navigation bar, choose the Grant Access to Patient Records link.
2. Then in the Options menu on the top right hand side of the screen, choose either Grant Full Access or Grant Access to Individual Patients
3. In the next screen, choose the desired delegates from the left text box and click the **Select** button so that their names appear in the right text box.
4. When you are happy with the users in the right text box, click the **Grant Access** button on the bottom right of the screen.
5. You will then return to the Grant Access to Patient Records page with the updated delegate(s).

How do I remove a delegate/clinician that I have given rights to?

1. To delete a delegate/clinician's access, click on the Grant Access to Patient Records link on the left navigation bar.
2. Locate the delegate/clinician that you wish to be removed. Click on the **Remove All** button next to the delegate/clinician's name.
3. If you want to remove the rights of a delegate/clinician to specific patients, you can choose the **Remove** button next to both the patients name and the delegate/physicians' name.

Transferring Patients

How do I accept a transfer?

1. Click on the Transfer Patients link in the Navigation bar on the right of the page.
2. Click on the patient that you want to accept.
3. Click on the **Accept** button.

How do I transfer a single patient?

1. Click on Patient List/Maintain Patient Records
2. Click on the patient that will be transferring to another Physician.
3. Click on the Transfer Patient link in the Options menu located on the top right of the page.
4. Choose the Physician that will be receiving the patient in *Step 2*.
5. Click on the **Create** button to send the request.

Note: The transfer will only occur once the receiving party accepts the transfer.

How do I transfer a group of patients?

1. Click on Transfer Patients in the Navigation bar on the right of the page.
2. Click on the Transfer Patient link in the Options menu located on the top right of the page.
3. In the Step 1 section, choose a patient to transfer, then click the **Select - >** button. Repeat until all desired transferees are in the right text box.
4. For Step 2, choose the physician to transfer to in the drop down box.
5. Click the **Create** button when done to send the request.

Note: The transfer will only occur once the receiving party accepts the transfer.

Searching for a Patient

How do I find/search for a patient?

You can search a patient in many ways with the CDM Toolkit.

By Search Engine

On the top of the site, there is a text box called *Patient Search*. You may enter the patients' first name, last name or PHN. When you click **Go** the search will show you a new page with all of your patients that matched your input. You may also choose the advanced search option to search through certain attributes. The advanced search will allow you to search by all demographic fields, as well as by clinical indicators conditions (eg: all patients with A1C greater then 8)

Notice when you search through patients that the blue tab moves to Search Results. To view the original list just click the "My Patients" tab (as a Physician) or the "Shared Patients" tab (as a delegate).

By Page/Last Name

You can view 10 to 50 patients per page by opening the drop down box on the top right of the patient table. The patients will be listed in alphabetical order by their last name. You may move page to page by clicking on the Previous or Next links located both above and below the Patient Table or you may view patients by their last name (upper left drop down box in the patient list table).

If you click on any of the column headers, the list will then be sorted by that column.

By Alphabet

Another way to search a patient is to click on the first letter of their last name in the navigation bar on the patient table. This will show only those patients with the last name that starts with the letter you chose.

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Patient Data

Adding/Removing Patients

How do I add a new patient to a patient list?

1) Click on the Patient List/Maintain Patient Records link in the left Navigation bar.
2) Click on Add New Patient in the Options menu (Top right of page)
3) In the next page, fill in as many fields as possible about the patient.

   Note: You must enter a patient name and a Health Care Number/Other number in order to proceed. If you are a delegate user, you must also select a primary care provider. If the physician you wish to add the patient for is not listed, you will need to get that physician to grant you "Full Access" to their patient list.

4) Click on the **Save** button when finished.
5) You will be asked to choose the disease. Choose the correct disease(s) and click **Continue**.
6) Next, you will be asked to supply some information regarding the chosen disease in the previous page. Click the **Save** button when done.

If the form was filled out properly you will be at the *Patient Details* page.

How do I remove a patient from the system?

1) Click on the Patient List/Maintain Patient Records link in the left Navigation bar.
2) Locate the Patient to be removed, and then click on the **Remove** button next to their name.

   Note: If you have been granted individual access to a patient, you will not be able to remove the patient. Please contact the physician who is responsible for that patient and have them remove the patient.

3) You will be asked to provide a reason for removing the patient. Choose a reason from the drop down box on the top of the page.
4) Click the **Save** button when finished.

You should return back to the Patient List/Maintain Patient Records page if there were no errors.

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Adding Baseline Data

How do I add baseline data to a patient record/flowsheet?

1) Click on the Patient List / Maintain Patient Records link in the Navigation bar on the left of the page.
2) Click on the patients' name in the Patient Table.
3) In the drop down box next to the chronic disease, choose **Add Baseline Data**.
4) Click on the **Go** button.
5) Fill in as many fields as possible for the baseline data.
6) Click on the **Save** button when you are done.

Editing Patient Data

How do I change single values in an existing patient record/flowsheet?

1) Click on the Patient List / Maintain Patient Records link in the Navigation bar on the left of the page.
2) Click on the patients' name in the Patient Table.
3) In the drop down box next to the chronic disease you wish to edit, choose Edit/View Flow Sheet and click **Go**.
4) Locate the data in the flow sheet that you wish to edit and click on it.
5) Enter the new value and choose a reason for changing the data.
6) Click on the **Save** button.

How do I edit/update patient information (First name, PHN, etc.)?

1) Click on the Patient List/Maintain Patient Records link in the left Navigation bar.
2) Click on the patient that needs to be updated.
3) Click on the Edit Patient Information in the *Options* menu on the top right of the page.
4) Fill out the appropriate information in the form
5) Click on the **Save** button when finished

You will be forwarded to the *Patient Details* page if there were no errors

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Adding New Patient Data

How do I add new data to a patient record/flow sheet?

1) Click on the Patient List/Maintain Patient Records link in the left Navigation bar.
2) Click on the patient that needs to be updated.
3) In the *Patient Details* page, choose **Add New Data** from the drop down box under the Actions column.
4) Click on the **Go** button.
5) Next, choose the date of observation from the drop down box and click **Continue**.
6) Enter the new data for the patient in the form.
7) When finished, click on the **Save** button.

Diagnosing Patients

How do I record a diagnosis on a patient record/flow sheet?

1) Click on the Patient List / Maintain Patient Records link in the Navigation bar on the left of the page.
2) Click on the patients' name in the Patient Table.
3) Click on the Diagnose Patient with New Disease link in the Options menu.
4) Click on the check box next to the patients' new disease (If a patient already has a disease, that disease will not show up here)
5) Click on the **Continue** button.
6) Fill out as much of the form as possible, then click on the **Save** button.

If a patient has already been diagnosed with a chronic disease, their previous information will automatically show in the form.

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How do I remove a diagnosis from a patient record/flow sheet?

1) Click on the Patient List / Maintain Patient Records link in the Navigation bar on the left of the page.
2) Click on the patients' name in the Patient Table.
3) In the drop down box next to the chronic disease, choose **Remove Diagnosis**
4) Click on the **Go** button.
5) In the next drop down box, choose a reason for removing the Diagnosis.
6) Click on the **Save** button.

How do I edit a diagnosis from a patient record/flowsheet?

1) Click on the Patient List / Maintain Patient Records link in the Navigation bar on the left of the page.
2) Click on the patients' name in the Patient Table.
3) In the drop down box next to the chronic disease, choose **Edit Diagnosis**
4) Edit the fields as needed.

Note: In order to maintain reporting consistency the original Care Start Date.

5) Click on the **Save** button.

Importing Data from Electronic Records Software

1) Export the data from your EMR software to a file on your computer.
2) Click on **Import Data**.
3) Click **Browse...** and locate the file on your computer.
4) Click **Save**.
5) Scan through the output to ensure there were no errors.

Note: If there were no errors, your data will be available in the CDM Toolkit. If there were errors, print the page to help with troubleshooting, and contact us with the errors.
If your EMR software is not compatible with the CDM Toolkit import, have the software vendor contact us, and we can help them to add support for it.

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Flow sheets

Viewing Flowsheets

How do I view a flowsheet?

1) Click on the Patient List / Maintain Patient Records link in the Navigation bar on the left of the page.
2) Click on the patients' name in the Patient Table.
3) In the drop down box next to the chronic disease you wish to edit, choose **Edit/View Flow Sheet** and click **Go**.

Printing Flowsheets

How do I print a patient flowsheet?

1) Click on the Patient List / Maintain Patient Records link in the Navigation bar on the left of the page.
2) Click on the patients' name in the Patient Table.
3) In the drop down box next to the chronic disease you wish to edit, choose **Edit/View Flow Sheet** and then click the **Go** button.
4) Click on the Print Flow Sheet link in the Options menu.
5) Click on the **Go** button selecting the patient you wish to see flow sheets for.

Note: The flowsheet will open on Adobe Acrobat. From here you can print the flowsheet by clicking the printer icon at the top of the screen, or save the flowsheet by clicking on the floppy disk icon at the top of the screen.

How do I print all the flowsheets for a patient?

1) Click on the Patient List / Maintain Patient Records link in the Navigation bar on the left of the page.
2) Click on the patients' name in the Patient Table.
3) Click the Print Patient Flow sheets link in the *Options* menu.
4) Ensure that the patient you want is selected in Step 1.
5) Click the **Continue** button.

Note: The flowsheet will open on Adobe Acrobat. From here you can print the flowsheet by clicking the printer icon at the top of the screen, or save the flowsheet by clicking on the floppy disk icon at the top of the screen.

How do I print a group of flowsheets?

1) Click on the Print Flow Sheets link in the Navigation bar on the left of the page.
2) In the step 1 section, highlight the patients to be used in the flow sheet in the My Patients box on the left.
3) Click on the **Add** button to move the patients to the right box.
4) For Step 2, select the Chronic Disease(s) you wish to print flowsheets for.

   Note: The system will automatically ignore flowsheets for patients who are not diagnosed with certain chronic diseases. (ie; you will not print a blank flowsheet for a patient who doesn't have a given disease)

5) Click on the **Continue** button.

Note: The flowsheet will open on Adobe Acrobat. From here you can print the flowsheet by clicking the printer icon at the top of the screen, or save the flowsheet by clicking on the floppy disk icon at the top of the screen.

Reports

Running a Report

How do I run a report?

1) On the left side of the page, click on the Generate Reports link in the Navigation bar.
2) Select the report you wish to run, and then click **Continue**.
3) Choose the parameters for the report and then click **Continue**.
4) The Report will open in Adobe Reader and may take a while to load depending on the parameters you choose. To print the report you can click on the printer icon on menu bar.

What do the parameters mean when generating a report?

When running reports, there are several common parameter selections that need to be made. Below is a list of them, and a description of what they mean.

- **Population**: The population selection allows you to choose which group of patients the report will be run on. This usually includes patients you own patients, patients that belong to a provider who has granted you full access, and all patients you have access to. For aggregate reports, you will also be able to run the report for any collaborative or practice teams you are a member of.
    - The runchart will allow you to select 2 populations for comparison
    - The data entry report will allow you to select as many populations as you want (hold down CTRL and click on each population).
- **Condition/Disease**: The condition selection will narrow you report to only include data for patients with the selected chronic condition.
- **Condition Qualifier**: The condition qualifier is used to identify a sub-type of the disease (eg: Type II Diabetes, or Systolic CHF).
- **Start Date/ End Date**: These fields allow you to specify a date range for your report, only data after the start date, and before the end date will be included.
- **Age Grouping**: The profile reports will group ages according to one of several standards groupings. This selection allows you to choose which standard will be followed.
- **Sort by**: These fields allow you to choose which data columns a list report is sorted by.

- **Date range**: In the Run Chart, the date range selection allows you to select the granularity of the run chart graphs. This will change the number of data points on the graph, so decrease the granularity if your data range exceeds 1 year.
- **Disease Attributes**: You can select up to six (6) observations to run a report on. If you wish to run the report for more attributes, run several reports.
- **Run Chart Type**: The run chart type selection allows you to choose between the Run Chart (just graphs) and the Run Chart Details (bigger graphs with data tables).

How do I print a report?

To print a report after it has been generated, just click the print icon on the menu bar in Adobe Reader.

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Additional Support

There is an on-line help system built into the CDM Toolkit that is accessible through the **Help ?** link on each page. The help will provide detailed step-by-step instructions similar to this manual.

Also, in many areas of the province there are local CDM Coordinators from the health authorities. Please contact your health authority for more information, and if support is available through this resource.

The Ministry of Health Helpdesk is also available for phone and email support of the CDM Toolkit.

Ministry of Health Helpdesk 1 (250) 952-1234
Email: .... hlth.hnetconnection@gems1.gov.bc.ca