 <p>Winnipeg Regional Health Authority Office régional de la santé de Winnipeg Caring for Health À l'écoute de notre santé</p> <p><b>PRIMARY HEALTH CARE OPERATIONAL GUIDELINES</b></p>	<p><b>Operational Guideline:</b> Access to eChart by Primary Care User Role</p>	<p><b>Guideline Number:</b> PCOG #21</p>
	<p><b>Approved By:</b> Primary Care Service Area Leadership</p>	<p><b>Pages:</b> 1 of 4</p>
	<p><b>Approval Date:</b> April 14, 2022</p>	<p><b>Supersedes:</b> April 11, 2017</p>

## 1. INTENT:

eChart Manitoba is a tool that provides authorized Primary Care Users with viewable, printable and searchable access to key health data. Primary Care Users are authorized to see health information within eChart Manitoba that they would need in order to provide safe healthcare to their clients. The privacy and security of personal health information is of utmost importance and therefore a consistent method for assigning and/or restricting access for all WRHA Primary Health Care team member roles is necessary.


## 2. DEFINITIONS:

**eChart Manitoba** - Is a secure web-based electronic system that provides authorized users with a consolidated view of personal health information such as drug prescriptions that have previously been filled (Drug Program Information Network - DPIN), immunization histories, laboratory results from participating labs, diagnostic imaging personal identifying information, and Provincial Admission, Discharge, Transfer (ADT) encounters. In addition to eChart Manitoba being available in Primary Care and Emergency Departments across Manitoba, it is also currently accessible by Public Health Nurses, Home Care Case Coordinators and Visiting Nurses, and Community Mental Health. eChart Manitoba connects health information from multiple electronic systems in order to improve the quality and timeliness of care.

**Primary Care Users** – May consist of roles such as Audiologist, Counsellor, Dietitian, Lab Technician, Medical Resident, Midwife, Nurse Practitioner, Occupational Therapist, Pharmacist, Physician, Physician Assistant, Primary Care Assistant, Primary Care Nurse, Privacy Officer, Psychiatrist, Speech Language Pathologist, Social Worker and Team Manager


## 3. GUIDELINE:

- 3.1 To support new Primary Care Users in using and understanding the fundamentals of eChart Manitoba, various training videos and resource materials are available for learning purposes at [eChart Manitoba - Training](#)
- 3.2 Access to eChart Manitoba shall be assigned to Primary Care Users according to the defined “Labour Classification” and “Authorized Levels of Access – By Primary Care Role” as outlined in “*APPENDIX A - Primary Care Team Member Access to eChart Manitoba Role Matrix*”
- 3.3 Per “*APPENDIX B - eChart Manitoba Access Role Matrix*” and “*APPENDIX C - Pathway for Determining Level of User Access*”, levels of access and definitions assigned to Primary Care Users are as follows:
  - **Demographic View** – An individual with the Demographic View role is authorized to view demographic information (name, address, date of birth, PHIN, and gender). The role of demographic view is required to complete a patient search.

 <p>Winnipeg Regional Health Authority Office régional de la santé de Winnipeg Caring for Health À l'écoute de notre santé</p> <p><b>PRIMARY HEALTH CARE OPERATIONAL GUIDELINES</b></p>	<p><b>Operational Guideline:</b> Access to eChart by Primary Care User Role</p>	<p><b>Guideline Number:</b> PCOG #21</p>
	<p><b>Approved By:</b> Primary Care Service Area Leadership</p>	<p><b>Pages:</b> 2 of 4</p>
	<p><b>Approval Date:</b> April 14, 2022</p>	<p><b>Supersedes:</b> April 11, 2017</p>

- **Laboratory and Reports View** – The Laboratory and Reports View provides an authorized user with access to laboratory results and diagnostic imaging reports as well as all documents under the clinical documents tab. At this time, the clinical documents tab includes microbiology and diagnostic imaging reports. The individual also has access to demographic information.
- **Immunization View** – An individual with access to Immunization View is authorized to view immunization information and demographic information.
- **Medications View** – An individual with access to Medication View is authorized to view medication information and demographic information.
- **Clinical View** – An individual with Clinical View is authorized to access all clinical and demographic views. There is no ability to override a patient's Disclosure Directive.
- **Clinical View with Images** – An individual with Clinical View with Images is authorized to access all clinical and demographic views and launch PACS Web Viewer. There is no ability to override a patient's Disclosure Directive.
- **Clinical View with Images & Override** - Granted to individuals who are members of a regulated health-care profession and who also have the ability to prescribe in a clinical setting (emergent or non-emergent) where the inability to access medical information would substantially compromise assessment, diagnosis and care. An individual with access to Clinical View with Images & Override is authorized to access all clinical and demographic views and launch PACS Web Viewer. They also have the ability to override a patient's Disclosure Directive where circumstances warrant this step.
- **Privacy View** – Granted to individuals who are authorized as Administrators or Privacy Officers to complete a patient search with access to demographics, laboratory and reports, immunization and medication information, and all clinical documents. These individuals have the ability to print personal health information, the ability to view who have seen a patient record, and the ability to print a Patient Log Report.
- **Privacy View with Override** - Granted to individuals who are authorized as Administrators or Privacy Officers to complete a patient search with access to demographics, laboratory and reports, immunization and medication information, and all clinical documents. These individuals have the ability to print personal health information, view who have seen a patient record, and print a Patient Log Report. This individual also has the ability to override a patient's Disclosure Directive.

- 3.4 In the event that a Primary Care User position requiring eChart Manitoba access has not been identified and defined per above, the site Team Manager will consult with the Primary Care Service Area to determine the applicable level of access to be granted.
- 3.5 Each Primary Care site is responsible for organizing and updating eChart Manitoba access for their respective staff on a regular basis. A review of eChart Manitoba access should be conducted no less than annually.

 <p>Winnipeg Regional Health Authority Office régional de la santé de Winnipeg Caring for Health À l'écoute de notre santé</p> <p><b>PRIMARY HEALTH CARE OPERATIONAL GUIDELINES</b></p>	<p><b>Operational Guideline:</b> Access to eChart by Primary Care User Role</p>	<p><b>Guideline Number:</b> PCOG #21</p>
	<p><b>Approved By:</b> Primary Care Service Area Leadership</p>	<p><b>Pages:</b> 3 of 4</p>
	<p><b>Approval Date:</b> April 14, 2022</p>	<p><b>Supersedes:</b> April 11, 2017</p>

3.6 [eChart Manitoba Access Forms](#) to be completed include:

- **User Account Form**  
Fill out the Account and Access Request form to Add New/Modify Existing/Disable Existing. This form may be used to add a user account, change a current user's access level, or terminate an account. The Team Manager or Community Area Director must approve the users and the access roles for each user. Completed forms are to be submitted to the Digital Health Service Desk. The Team Manager or Community Area Director must have been identified as the Authorized Account requestor or Authorized sponsor.
- **Authentication Questions Form**  
Each user must fill out the Authentication Questions and Answers form. This form is required for the Service Desk staff to validate the identity of the caller if they call for assistance or password changes for eChart Manitoba.
- **Site Contacts Update Form**  
Each Authorized Account requestor or Authorized sponsor must fill out the eChart Manitoba Site Contacts Update Form when the request involves any changes to site contacts. The form can be submitted to the Service Desk by email.

3.7 Upon being granted access, each user must electronically accept the *Terms of Use* for eChart Manitoba when they log in for the first time. This must be completed via web access and not through the EMR launch.


3.8 All Primary Care Users authorized to access Personal Health Information must limit use to the minimum amount of information necessary to accomplish the purpose for which it is used. [Regional Policy #10.40.100 Use of Personal Health Information](#) shall be referred to as required

#### 4. **SOURCE/REFERENCES:**

- eChart Manitoba webpage at [Home - eChart Manitoba](#) and [eChart Handbook for Health-care Providers](#) (Version 11, February 2021)
- Consultation with Primary Care Service Area Leadership, Primary Care Direct Operation Clinic Team Managers and EMR Support Services (March and April 2022)

#### 5. **APPENDICES:**

- **APPENDIX A** – Primary Care Team Member Access to eChart Manitoba Role Matrix
- **APPENDIX B** – eChart Manitoba Access Role Matrix
- **APPENDIX C** – Pathway for Determining Level of User Access

 <p>Winnipeg Regional Health Authority Office régional de la santé de Winnipeg Caring for Health À l'écoute de notre santé</p> <p><b>PRIMARY HEALTH CARE OPERATIONAL GUIDELINES</b></p>	<p><b>Operational Guideline:</b> Access to eChart by Primary Care User Role</p>	<p><b>Guideline Number:</b> PCOG #21</p>
	<p><b>Approved By:</b> Primary Care Service Area Leadership</p>	<p><b>Pages:</b> 4 of 4</p>
	<p><b>Approval Date:</b> April 14, 2022</p>	<p><b>Supercedes:</b> April 11, 2017</p>

**SCOPE:** Applicable to all WRHA Primary Care Direct Operated Clinics (including Walk-In Connected Care Clinics), Midwifery Services and Antenatal Home Care Program.

**NOTE:** While the Funded Community Health Agencies are out of scope of Primary Care Operating Guidelines, it is recommended the content and/or processes be adapted/adopted where applicable.

*\*Questions regarding this or any other Primary Care Operating guideline should be directed to Primary Care Service Area Leadership*