 <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> <i>Enrolment Process in Primary Care</i></p>	<p><b>Guideline Number:</b> <i>PCOG#25</i></p>
	<p><b>Approved By:</b> <i>Community Primary Care Council</i></p>	<p><b>Pages:</b> <i>1 of 5</i></p>
	<p><b>Approval Date:</b> <i>September 12, 2019</i></p>	<p><b>Supercedes:</b> <i>May 17, 2016</i></p>

## 1. **INTENT**

- 1.1 To ensure a consistent and reliable regional process in alignment with provincial direction and policy for enrolment of patients in Primary Care. Enrolling patients is a foundational step to clinical information sharing between providers and the rest of the health care system.
- 1.2 To identify a process that will confirm and record a Primary Care Home or Home Clinic for every patient agreeing to consider that clinic as most responsible for managing their basic health services
- 1.3 To support program strategies such as Quality Improvement, Advanced Access, Interprofessional Practice, Collaborative Care, Continuity of Care and My Health Teams

## 2. **DEFINITIONS**

**Active Enrolment** – Process that involves direct communication (verbal or written) with the patient and ensures their understanding of the benefits of Home Clinic enrolment. The communication also clarifies the responsibilities of both the Home Clinic and the enrolled patient. Active enrolment involves the patient directly in the enrolment decision.

When an active enrolment occurs and there is an enrolment agreement, the date of the active enrolment discussion is documented in the Electronic Medical Record (EMR) as the Enrolment Start Date. Active enrolment can occur with new or existing patients and with patients who are currently passively enrolled.


**Enrolment** – Process by which a patient is recognized to have the Home Clinic as their primary provider of care and the Home Clinic agrees to provide comprehensive continuous primary care and to coordinate care with other health-care providers.

**Enrolment Start Date** – Represents the date within the EMR on which the patient/client enrolled with the Home Clinic.

**Enrolment End Date** – Represents the date within the EMR on which the patient/client was de-enrolled.

**Home Clinic** – Is a patient-centred primary care clinic that serves as a patient's home base within the health-care system. Home Clinics provide patients with timely access to care, coordinate their health care within the health-care system and manage their health-care records. Having a home base helps support comprehensive and continuous care throughout a patient's life.

**Most Responsible Provider (MRP)** – Also referred to as the main Primary Care Provider. The MRP is a Physician or Nurse Practitioner who has the lead role and medico-legal responsibility for overseeing the enrolled patient's care. The MRP provides ongoing, comprehensive primary care, including ongoing coordination with other health-care providers,

 <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> <i>Enrolment Process in Primary Care</i></p>	<p><b>Guideline Number:</b> <i>PCOG#25</i></p>
	<p><b>Approved By:</b> <i>Community Primary Care Council</i></p>	<p><b>Pages:</b> <i>2 of 5</i></p>
	<p><b>Approval Date:</b> <i>September 12, 2019</i></p>	<p><b>Supersedes:</b> <i>May 17, 2016</i></p>

monitoring and management of patient condition(s), patient care plan(s) and ongoing communication with the patient regarding their care.

The MRP supports the whole patient, not just their illness, and they will focus on wellness, not just treatment. They emphasize health promotion, chronic disease prevention and risk reduction, early detection of health problems, self-care, and evidence-informed chronic disease management, including mental illness. The MRP develops patient-centred strategies to ensure patients can make informed choices and are partners in care planning and management.

### 3. GUIDELINE

3.1 Manitoba Certified EMRs will include Client Enrolment Date and Client Termination Date fields. These fields will be used consistently and exclusively to document Home Clinic enrolment.


3.2 A new enrolment should only be documented using the Client Enrolment Date field if a representative of the Home Clinic had an enrolment conversation and confirmed the agreement with the patient. This is known as active enrolment and it minimizes the risk for patients being enrolled elsewhere as patients can only choose one Home Clinic and one main primary care provider at a time.

3.3 Documenting a patient's enrolment status in the EMR contributes to the accuracy of the analytic reports produced by Manitoba Health, Seniors and Active Living (MHSAL). The analytic reports integrate Home Clinic and enrolment data with data from other sources (i.e. Medical Claims, Primary Care Data Extract, Home Clinic Repository, etc.) to provide Home Clinics with more robust reporting.

The quarterly *Primary Care Report for Home Clinics* provides detailed statistics related to each individual Home Clinic and its associated main Primary Care Providers. It features data for enrolment, Home Clinic visit activity, Primary Care Quality Indicators, as well as an overview of provincial primary care targets and achievements. The primary goal of this report is to help Home Clinics know and understand their data to inform clinical practice and continuous quality improvement activities. This report will be enhanced with new data over time.

Additionally, the enrolment status including patient's Home Clinic and main primary care provider is posted to eChart Manitoba directly from the Home Clinic Repository to help the health care system identify who has a primary care provider thereby ensuring all Manitobans receive the care and support they may require.

3.4 There may be ambiguity in instances where no Client Enrolment Date has been entered for a patient, yet the Patient Status is "active" and a relationship to a specific provider is noted. This may indicate that a patient is only an occasional patient of the clinic, or it may indicate a patient with whom the clinic has not yet had an enrolment conversation, or it may indicate a patient has declined to be enrolled.

 <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> <i>Enrolment Process in Primary Care</i></p>	<p><b>Guideline Number:</b> <i>PCOG#25</i></p>
	<p><b>Approved By:</b> <i>Community Primary Care Council</i></p>	<p><b>Pages:</b> <i>3 of 5</i></p>
	<p><b>Approval Date:</b> <i>September 12, 2019</i></p>	<p><b>Supercedes:</b> <i>May 17, 2016</i></p>

3.5 When a patient makes a request to the clinic to terminate their enrolment agreement, the Client Termination Date should be entered by the clinic along with the reason for termination.


3.6 Upon subsequent visits by a patient who has already been enrolled, it may be necessary for the clinic to ensure that primary care patient is still associated with a specific provider within that clinic as applicable using existing processes and EMR fields.

*Appendix A – Accuro Enrolment Reference Guide* provides instruction for documentation within the EMR and includes:

- Enrolling a Client with a Primary Care Practitioner
- Terminating a Client's Enrolment with a Primary Care Practitioner
- Provider Enrolment History
- Client Declines Enrolment

3.7 Active enrolment requires that agreement be reached between a representative of a Home Clinic and a patient through an explicit enrolment conversation that covers the following topics:

- (a) Benefits of seeking all, or at least the majority, of your primary care from a designated MRP within a Home Clinic
  - A long-term relationship with a primary care provider who knows the patient's medical history.
  - A primary care provider who accepts responsibility for helping the patient to maintain and improve health and wellness.
  - A primary care provider who takes the lead in managing patient preventive care and chronic conditions.
  - A primary care provider who helps coordinate care that may be needed from specialists.
- (b) Role of a Home Clinic
  - Provide the best care possible.
  - Coordinate any specialty care needed.
  - Offer timely access to primary care to the best of its ability.
  - Maintain an ongoing record of the patient's health.
  - Keep patients updated on any changes to services they offer.
- (c) Role of a Home Clinic patient
  - Seek health care from the Home Clinic whenever possible.
  - Give the name of the Home Clinic, if visiting emergency or another provider.
  - Have the identity of the Home Clinic made available to other health care providers involved in care to help coordinate care.
- (d) Patient's ongoing right to seek primary care elsewhere
  - Patients will still have the right to choose.

 <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> <i>Enrolment Process in Primary Care</i></p>	<p><b>Guideline Number:</b> <i>PCOG#25</i></p>
	<p><b>Approved By:</b> <i>Community Primary Care Council</i></p>	<p><b>Pages:</b> <i>4 of 5</i></p>
	<p><b>Approval Date:</b> <i>September 12, 2019</i></p>	<p><b>Supercedes:</b> <i>May 17, 2016</i></p>

- Patients enrolled with a Home Clinic will not be restricted in any way from seeking care from other providers or at other locations.
- The Home Clinic will support continuity of care over the long-term to improve the quality and safety of patient's health care.

(e) Process to end or change enrolment

- If the patient would like to end their enrolment, a request to the Home Clinic will initiate the process of cancelling the patient's enrolment.

(f) Protection of personal health information


- Enrolment with a Home Clinic does not change the patient's right to have their personal health information protected.
- Health care professionals are allowed to share only as much personal health information with other providers as is necessary for patient care.

3.8 To assist with enrolment efforts at the clinic level, each Primary Care Clinic should consider implementing a standardized process so enrolment becomes an automatic part of daily operations. Steps to consider may include:

- As part of the intake process, each eligible patient is provided with current reference material (customizable to meet your needs) as available on the Shared Health Manitoba [Registered Home Clinics - Patient Communication Supports](#) webpage. The patient should be asked to review the material prior to their first appointment.
- Upon checking in at reception for the first appointment, the patient is given *Appendix B – Your Home Clinic, Enrolment Tool* (customizable to meet your needs) to review and complete as applicable
- Patient reviews and takes enrolment tool into appointment
- Provider discusses Home Clinic and enrolment with patient answering any questions they may have; the enrolment tool is signed as applicable
- Once agreement between both parties has occurred, the current date must be documented in the EMR as the Enrolment Start Date. This step can be completed by either the provider during the appointment or by a designated Primary Care Assistant after the appointment. Note: Use of an enrolment tool is intended for coordination of internal intake purposes only; it would not become part of the patient record.

#### 4. SOURCE/REFERENCES

- MHSAL Enrolment Process Guidelines; draft version (September 10, 2012)
- PIN Enrolment Process Guidelines; Guidelines for PCN Review (November 2012)
- Working Group consisting of membership from CSIS, PCIS, Primary Care Program and Primary Health Care Leadership (August 2013)
- Access Winnipeg West – Development of “Enrolment Tool” (October 2014)
- MHSAL *Primary Care Report for Home Clinics*; quarterly report (July 1, 2019)
- Consultation with MHSAL, PCIS and CSIS (September 2019)
- Shared Health Manitoba [Registered Home Clinics - Patient Communication Supports](#) webpage

 <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> <i>Enrolment Process in Primary Care</i></p>	<p><b>Guideline Number:</b> <i>PCOG#25</i></p>
	<p><b>Approved By:</b> <i>Community Primary Care Council</i></p>	<p><b>Pages:</b> <i>5 of 5</i></p>
	<p><b>Approval Date:</b> <i>September 12, 2019</i></p>	<p><b>Supercedes:</b> <i>May 17, 2016</i></p>

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**7. APPENDICES**

- **Appendix A** - Accuro Enrolment Reference Guide
- **Appendix B** - Your Home Clinic, Enrolment Tool

**SCOPE:** Applicable to all WRHA Primary Care Direct Operated Clinics.

Any site/service not providing a patient with all aspects of their health care needs would not be considered a Home Clinic and therefore would not enroll patients. All Walk In Connected Care Clinics, Teen Clinics, RAY, Antenatal Home Care or Midwifery Services are considered out of scope of this guideline.