my.CareConnect Enrolment Portal User Guide

How to Manage CareConnect access for On-Behalf-Of Users

Contents

Version 1.0 – Oct 19,2022

1: Key Definitions & Access Rules

CareConnect
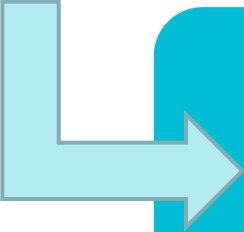
1A. Community-Based User Definition

- A Community-Based User is defined as an individual who accesses CareConnect to support or directly deliver patient care from a private practice, community organization or non-health authority setting

- As a reminder, all CareConnect users must be associated with a clinical worksite
  - This includes private practice clinics, working remotely from a home office or delivering/ coordinating mobile care from a community-based worksite
  - Users who have health authority access MUST ALSO register for Careconnect via their organization; this access is managed separately from
  - Your access may be audited based on the worksite that you access patient records from

- Community-based user access is provided depending on your profession and role
  - Practitioners who support the delivery care of care without supervision from a physician or nurse practitioner
  - Support staff (i.e. MOAs) can request CareConnect access if a physician or nurse practitioner sponsors their access.

1B. Authorizer & On-Behalf-Of User Type Definitions

Authorizers

- Users that have the ability to approve employees to work on-their-behalf
- Must complete the P&S Course and sign the HPCAA (Physician & NPs)

On Behalf-of-Users

- User must be granted permission by an Authorizer prior to being granted access to CareConnect
- Sponsored On-Behalf-Of User can see the same information as the Authorizer
- Must complete the P&S Course, but does not need to sign the HPCAA

Physician (Dr. Jones) designates their MOA to work 'On-Behalf-Of'

MOA (Jane) can view CareConnect as if they were Dr. Jones

1D. Functions Available to Each User Type

(click links for detailed instructions)

Function	CareConnect User Types Without my.CareConnect *Group Site Admin Privileges*		
	Independent	Authorizer	OBO
How to Register a Worksite			
How to Register an Individual User for CareConnect Access	X	X	X
How to Invite a User to Your Worksite		X	
How to Activate / Deactivate Users		X	
How to Add / Remove Group / Site Administrator			
How to Authorize an On-Behalf-of-User		ONLY	
How to Request Sponsorship as an On-Behalf-Of User			ONLY
How to Sign and Print the HPCAA	X	X	
How to Update Worksite Information			
How to Update User Information	X	X	X
Not in my.CareConnect Enrolment Portal currently			
How to Complete Site-Level P&S Declaration (if signing authority)	X	X	
How to Complete Learning Hub Privacy Security Course	X	X	X

1E. User Types & Professions Approved for Access

See highlighted areas for professions who are approved to access CareConnect currently via Ministry of Health Designation Order

All other professions will be able to register in the Portal
BUT
Cannot access CareConnect until a Designation Order is approved for their profession

Professions

My.CareConnect Enrolment → Profession entered upon enrolment

One of:
- Nurse Practitioner
- Physician

One of:
- Chiropractor
- Diagnostic Medical Sonographer
- Massage Therapist
- Medical Lab Technologist
- Midwife
- Nutritionist
- Occupational Therapist
- Osteopath
- Pharmacist
- Physiotherapist
- Registered Nurse
- Resident

One of:
- Licensed Practical Nurse
- Medical Office Assistant
- Medical Radiation Technologist
- Pharmacist Technician
- Social Worker Full Class
- Social Worker Non-Practicing Class
- Social Worker Provisional Class
- Social Worker Temporary Class

My.CareConnect User Type

Authorizer

Independent

OBO (On-behalf-of)

2: Join An Existing Worksite in the my.CareConnect Enrolment Portal

2A. CareConnect Enrolment Steps: High-Level Overview

This guide covers STEP 3 of the CareConnect registration process, specific to approving CareConnect access as an Authorizer OR requesting sponsorship as an On-Behalf-Of-User. See PAGE 1E for details on which professions apply.
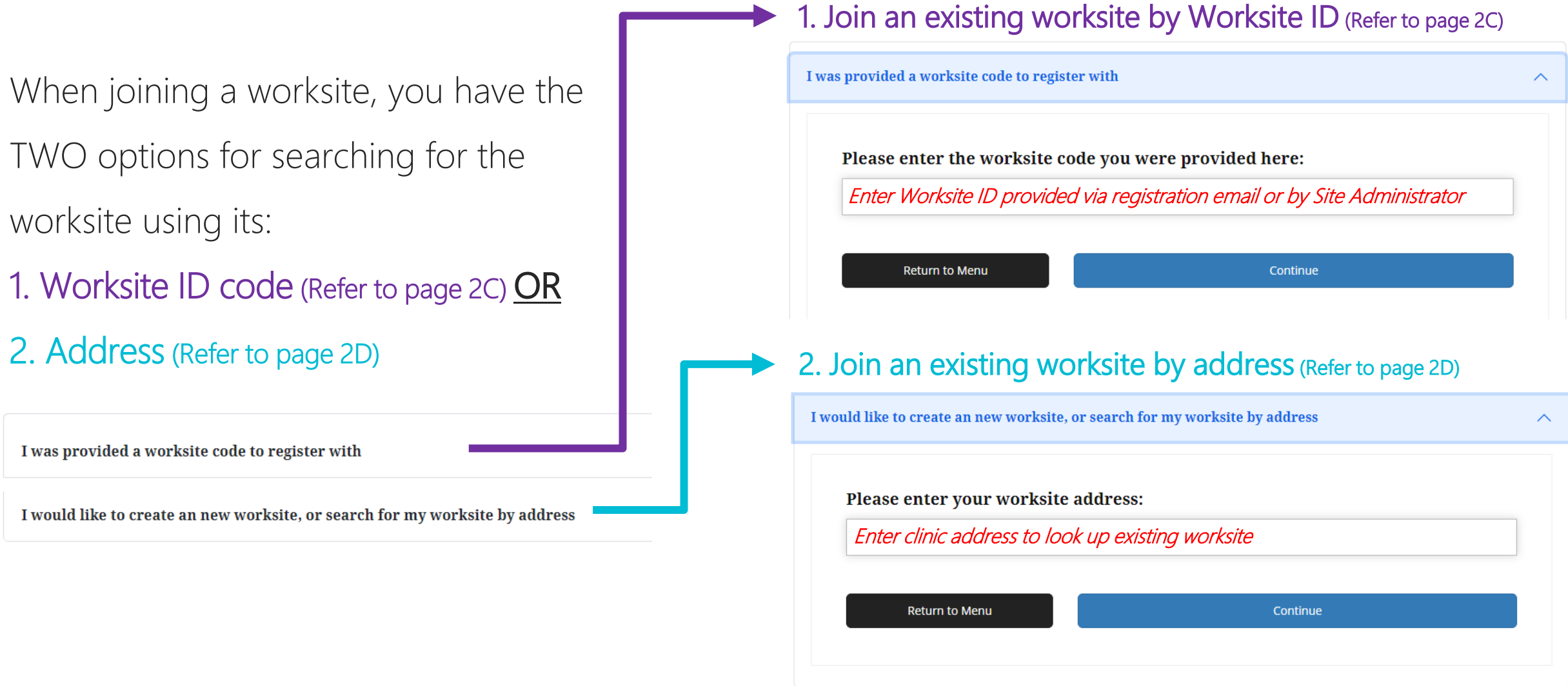
STEP 1	STEP 2	STEP 3	STEP 4
Validate your identity and log-in using the BC Services Card app	Register or Request Worksite Access	Register Individual User Access	Complete Privacy & Security Requirements

- If you have not already completed STEP 1, see the How To Validate your Identity using the BC Services Card App Guide.
- If you have not already completed STEP 2, see the How to Register a Worksite for CareConnect Access Guide.

2B. Two ways to join an existing worksite

When joining a worksite, you have the TWO options for searching for the worksite using its:

1. Worksite ID code (Refer to page 2C) <u>OR</u>

2. Address (Refer to page 2D)

I was provided a worksite code to register with

I would like to create an new worksite, or search for my worksite by address

1. Join an existing worksite by Worksite ID (Refer to page 2C)

I was provided a worksite code to register with ⌃

Please enter the worksite code you were provided here:

Enter Worksite ID provided via registration email or by Site Administrator

Return to Menu   Continue

2. Join an existing worksite by address (Refer to page 2D)

I would like to create an new worksite, or search for my worksite by address ⌃

Please enter your worksite address:

Enter clinic address to look up existing worksite

Return to Menu   Continue

2C. OPTION 1: Join an existing worksite by Worksite ID

- If you had previously registered your own Worksite, you would have received an email, which contains the **Worksite ID.**

- Alternatively, you may have received an invitation to join a clinic by your Site Administrator, which includes the **Worksite ID.**

- Click on the I was provided code to register with option and enter the provided Worksite ID.

Continue on to *STEP 2E. Complete Worksite Access Request Form* to continue.

Hello PHSAPOC Dalia EIGHTEEN,

You just registered your worksite for access to CareConnect.

Your new Worksite is: Kingsgate Mall Clinic
Your Worksite Id is: K4T6CLP

If you didn't make this change, please contact CareConnect@phsa.ca

I was provided a worksite code to register with

Please enter the worksite code you were provided here:

K4T6CLP

Return to Menu   Continue

2D. OPTION 2: Join an existing worksite by address

- If you do not know your worksite ID

- Click on the I would like to create a new worksite, or search for my worksite by address option and enter the provided Worksite ID.

- As you type, Canada Post validated addresses will appear in the search bar.

- Select the specific address and unit for your worksite.

Continue on to *STEP 2E. Complete Worksite Access Request Form* to continue.

2E. Complete Worksite Access Request Form

- If there is a match with an existing Worksite, you will see the "Worksite Access Form" which identifies the worksite by its name and address.

- Comments entered in the Request Access to Worksite field will be sent to the clinic's Site Administrator.

- After you click the Request Access button, your request will be sent to the Site Administrator.

- You will receive a confirmation message stating that your request has successfully been sent.

Worksite Access Form

Worksite Name

Kingsgate Mall Clinic

Worksite Address

370 Broadway E, VANCOUVER BC V5T 4G5, CANADA

Request Access to Worksite

You may provide any additional information required below as part of the request for access. This will be sent to the Worksite Administrator listed above for approval.

Return to Menu   Request Access

Clinic Access Request

Request has successfully been sent.

You will receive a email once your request has been approved.

Main Menu

2F. Worksite Access Request Sent & Approved

- The Group / Site Administrator will receive your access request, along with the details that you provided on the Worksite Access Request form.

- You will be notified via your provided email address once you have been approved for access.

Access Request for Worksite: Kingsgate Mall Clinic

Hello Dalia Eighteen,

PHSAPOC Gregory NINETEEN, test_myCC@Phsa.ca would like to join Kingsgate Mall Clinic.

If you would like to approve their ability to access CareConnect from the Kingsgate Mall Clinic, please click on the link below, or login to My.CareConnect to approve their request.

Click Here to approve PHSAPOC Gregory NINETEEN's request to join Kingsgate Mall Clinic

If you need help with this request please contact CareConnect@phsa.ca

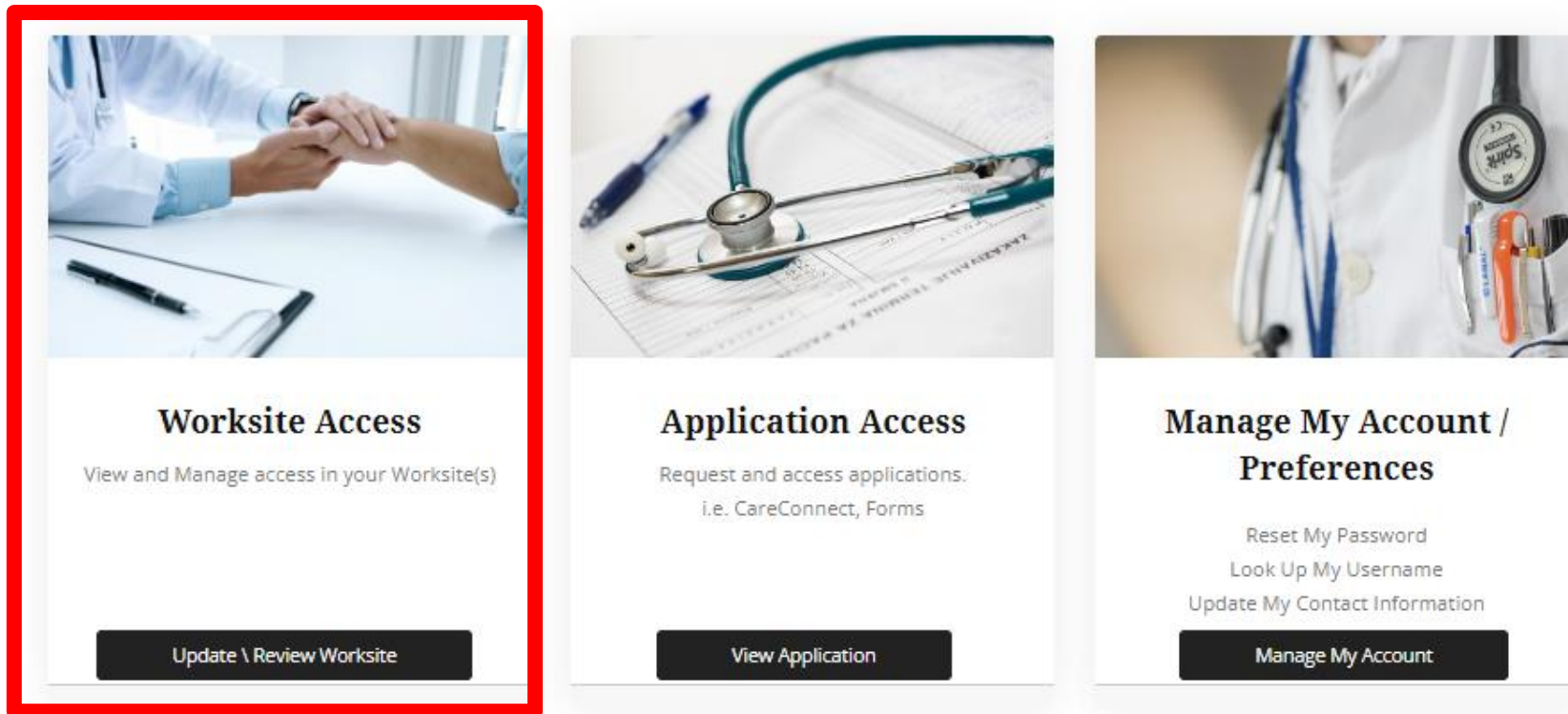3: Request Sponsorship as an On-Behalf-of User (i.e., MOA/LPN)

CareConnect

3A. Request Sponsorship as an On-Behalf-Of-User
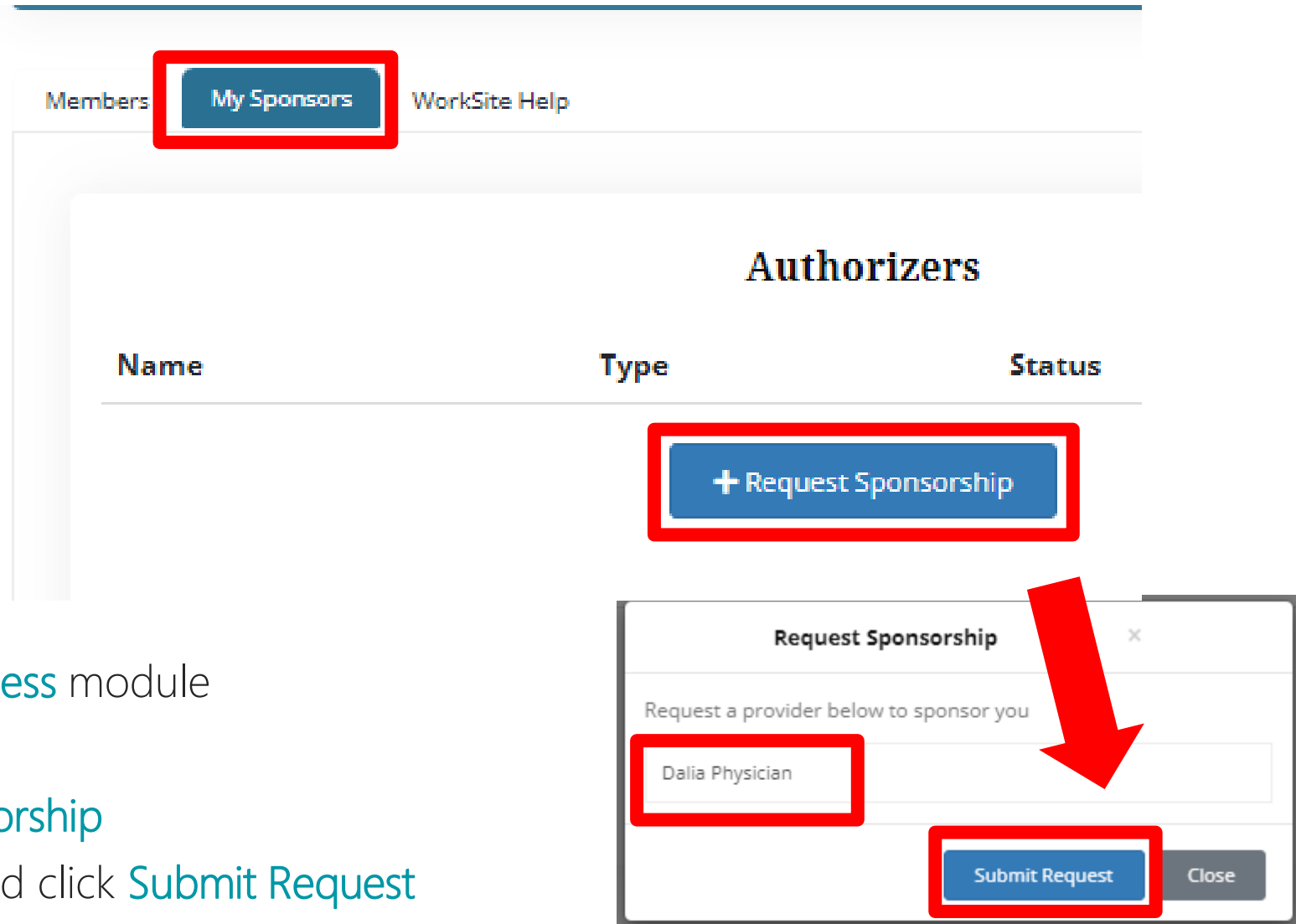
If you work in a profession that requires an Authorizer to sponsor your access, there are a few ways you can request sponsorship: 1) via the Worksite Access module and 2) via the Application Access module.

Worksite Access

View and Manage access in your Worksite(s)

Update \ Review Worksite

Application Access

Request and access applications.
i.e. CareConnect, Forms

View Application

Manage My Account / Preferences

Reset My Password
Look Up My Username
Update My Contact Information

Manage My Account

3B. Request Sponsorship via the Worksite Access module

Worksite Access

View and Manage access in your Worksite(s)

Update \ Review Worksite

Members   My Sponsors   WorkSite Help

Authorizers

Name	Type	Status

+ Request Sponsorship

Request Sponsorship

Request a provider below to sponsor you

Dalia Physician

Submit Request   Close

- Click on the Worksite Access module
- Click My Sponsors
- Click on +Request Sponsorship
- Select your Authorizer and click Submit Request

3C. Request Sponsorship via the Application Access module

- Click on the Application Access module
- Select your **Authorizer** from the list
- Complete the rest of the Enrolment Form
- Click Submit

Application Access

Request and access applications.
i.e. CareConnect, Forms

View Application

CareConnect Enrolment Form

Registered Clinic(s)

Barclay Clinic

Add Clinic

You are currently not Sponsored, Please select a Sponsor

Dalia Physician

Last Name	First Name
Nurse	Greg

Job	College ID
LpNurse	

☐ The information provided on this form is correct

☐ I require CareConnect access to support my job duties, and will only access CareConnect in support of direct clinical care. I understand and acknowledge that this request does not include access for purposes of secondary use such as research, quality improvement or quality assurance purposes.

☐ In line with the Ministry of Health policy, a review of every user's access is required annually. As part of this annual review, please expect to be contacted to review and confirm if access is still required

I require access to CareConnect to adequately perform my job duties

Select

I require access to CareConnect to provide / support direct patient care

Select

Return to Menu   **Submit**

3D. On-Behalf-Of Access Request Approved

- Once your request has been received, the Authorizer needs to click the link to approve.

- The On-Behalf-Of-User will be granted to same access as the Authorizer

Access Request for Worksite: Barclay Clinic

Hello Dalia Physician,

Greg Nurse has requested Sponsorship from you for Worksite Barclay Clinic.

Click here to approve Greg Nurse request to join Barclay Clinic

If you need help with this request please contact CareConnect@phsa.ca

Your authorization request has been approved

BARCLAY CLINIC
101-1234 BARCLAY ST, VANCOUVER BC V6E 1H4, CANADA

Worksite Phone: (778) 888-9999   **Worksite Email:** matsumaa@pm.me

Worksite Id:
DHE1Y4N

Member   My Sponsors   WorkSite Help

Authorizers

Name	Type	Status	
Dalia Physician	Physician	✔	✖ Remove

+ Request Sponsorship

Return to Menu

3E. Request Processed by CareConnect Team

- After submitting your access request, you will receive an email from the CareConnect team indicating that your request has been received and is in queue for processing.

- As a requirement for accessing CareConnect, you must complete the eHealth Viewer (CareConnect) – Privacy and Security Training for Community Care Provider course (~10-15 mins long) as indicated in the email.

- NOTE: The Privacy and Security course is mandatory for CareConnect access, so we recommend completing this course as soon as possible to avoid delays.

CareConnect Access Request

Hello PHSAPOC Dalia EIGHTEEN,

Your request for access to CareConnect has been received. The expected turn-around time for processing your request is 1-2 business days, after privacy and security training is completed.

The CareConnect Private Practice Privacy and Security course can be found at
https://learninghub.phsa.ca/Courses/24887/ehealth-viewer-careconnect-privacy-security-training-for-community-care-providers

This process may take longer if the submitted form is incomplete or requires additional information. Processing times may also vary depending on the volume of requests received.
If you didn't make this request, please contact CareConnect@phsa.ca

Thank you for your request, you will be notified by email when your access has been granted.

The CareConnect Team

4A. Approve CareConnect access

- The Authorizer selected by the On-Behalf-of-User will receive the following email, asking them to approve access
- Simply click the link to authorize this user to access CareConnect with the same permissions as you

Access Request for Worksite: Barclay Clinic

Hello Dalia Physician,

Greg Nurse has requested Sponsorship from you for Worksite Barclay Clinic.

Click here to approve Greg Nurse request to join Barclay Clinic

If you need help with this request please contact CareConnect@phsa.ca

4B. Request Processed by CareConnect Team

- After submitting your access request, you will receive an email from the CareConnect team indicating that your request has been received and is in queue for processing.

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If you didn't make this request, please contact CareConnect@phsa.ca

Thank you for your request, you will be notified by email when your access has been granted.

The CareConnect Team

4C. CareConnect Enrolment Steps: Next Steps

The final step of the CareConnect registration process is to complete the Privacy & Security Course and additional agreements as required. See the How to Complete Privacy & Security Requirements guide for detailed instructions.

STEP 1	STEP 2	STEP 3	STEP 4
Validate your identity and log-in using the BC Services Card app	Register or Request Worksite Access	Register Individual User Access	Complete Privacy & Security Requirements

Questions? Check out our FAQ page or email private.careconnect@phsa.ca

CareConnect