

my.CareConnect Enrolment Portal User Guide

How to Apply For CareConnect As An Authorizer



Information Management / Information Technology Services, PHSA

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CareConnect Enrolment: High-Level Overview

This guide covers STEP 4 of the CareConnect registration process, which is How to Apply for CareConnect Access as an Authorizer (e.g. Physician or Nurse Practitioner).

card app

Kequirements

The steps involved may differ slightly depending on your profession/role. See the <u>Key Definitions & Access</u> <u>Rules</u> section to learn about the different roles and/or refer to the role-specific How To Guides below:

- If you are an MOA or Nurse (LPN), see <u>How to Apply for CareConnect as an On-Behalf-Of User</u>.
- If you are a Pharmacist, RN or an unsupervised nurse (FNHA/LTC), How to Apply CareConnect As An Independent User.

If your worksite has not already been created OR you have not been provided with a Worksite ID, see the <u>How</u> to Register a Worksite as a Site Administrator guide.



1. Key Definitions & Access Rules





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 or non-health authority setting
- As a reminder, all CareConnect users must be associated with a clinical worksite
 - This may involve registering a private practice clinic address, working remotely from a home office or delivering/coordinating mobile care from a community-based worksite
 - If you work at multiple places of service, you must register or join each unique worksite
 - Your access may be audited based on the worksite that you access patient records from
- Community-based user access may differ depending on your profession and role

 Access to certain clinical data is governed through Ministry of Health Designation Orders
 Certain professions may be restricted from accessing certain kinds of data (e.g. medications, labs etc.)
 Support staff (e.g. MOAs) may require approval to access and view CareConnect on behalf a physician

or nurse practitioner

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

Authorizer	Must complete the Privacy & Security Course and sign the Healthcare Practitioner CareConnect Access Agreement (Physician, Nurse Practitioners and Registered Nurses)
On Behalf-of- User	lser must be granted permission by an Authorizer prior to being granted access to CareConnect ponsored On-Behalf-Of User can see the same information as the Authorizer fust 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

1C. Independent User Type Definitions

Independent

- Users that can request access to CareConnect without an Authorizer
- Independent users cannot approve access to CareConnect like Authorizers
- Still required to complete P&S Course & requirements (i.e. HPCAA if applicable)

EXAMPLES OF INDEPENDENT PROFESSIONS



- Pharmacist
- Licensed Practical Nurse
- Social Worker (All Classes)
- Resident
- Registered Psychiatric Nurse

1D. User Types & Professions Approved for CareConnect Access





2: Join An Existing Worksite





2A. Accept Invite to Join an Existing Worksite

 In order to register as a user, you must join a worksite that has been created (See <u>How</u> <u>to Register a Worksite as a Site</u>

<u>Administrator</u> for instructions on how to set one up if needed).

- If your Site Administrator has already registered your worksite, you will likely receive an email invitation or worksite ID. To accept, click on the link.
- If you did not receive an invite, you can still log-in and search for your worksite by going to <u>my.careconnect.ca</u> and click on Enrol or Manage Your Account.

Hello,

Dalia Physician has invited you to join the Barclay Clinic worksite on the My.CareConnect site. Accepting this invitation will allow you to access CareConnect while you are working in the worksite. If you choose not to become a member of the Barclay Clinic your CareConnect access will not be permitted from this location.

Please note, this letter is only to notify you of your invitation to join this worksite. It is not a notification of enrolment. If you are not enroled in CareConnect please follow the steps on the <u>My.CareConnect</u> site to start the enrolment process. To accept this invitation and add it to your list of <u>My.CareConnect clinics click here</u>

not previously registered for access on My.CareConnect, be sure to use the email address you were invited with:

test@email.com

When selecting a worksite to join please use the following worksite Id: DHE1Y4N

2B. Login Using the BC Services Card App

Log in to: Health Provider ADFS

This service will receive your: given names, surname 🕑

Set up the BC Services Card app The app is your digital ID on your mobile device. It's government's trusted way to securely access services online. Get set up Already set up? Continue with: **BC Services Card app**

- If you have already validated your identity,
 click BC Services Card app and proceed to the next step.
- NOTE: If this is the first time you are using the BC Services Card to authenticate, click on the Get Set Up button and refer to <u>How To</u> <u>Validate your Identity using the BC Services</u> <u>Card App Guide</u> for detailed instructions.

2C. Create Your HxBC Account

If this is your first time logging in to the my.CareConnect enrolment portal, please complete the fields outlined on the registration form (**NOTE:** If you have an HxBC account, proceed to **STEP 2D**):

1. Name: User can enter a Preferred First and Last Name.

NOTE: The greyed out First and Last Names are linked to the user's BC Services Card and cannot be changed by the user.

2. Profession: User selects their profession from the dropdown and enters their corresponding IDs based on their profession.

NOTE: If you choose Yes to being a medical resident, you may need an Authorizer to approve your access.

3. Contact Information: The user enters their email address and phone number(s).

NOTE: A unique email address is required and cannot be shared with another user. If you received an invite to join a worksite, please enter the same email here.

Account Registration

In order to access CareConnect, you will need to create an HxBC account, or register an existing Health Authority account. Please follow the steps below to setup your account.

Contact Information

We will use this contact information to notify you in the event of an issue with your account. You may update this information from the main page if it changes.

First Name		Preferred First Name	
PHSAPOC Dalia	•		^
Middle Name			
	•		
Last Name		Preferred Last Name	
EIGHTEEN	•		· · ·
Please Select your Profession		MSP Billing#	
Physician		1234567	
Are you currently medical resident?		CPS ID#	
O Yes O No		(e.g. A0000 or 00000)	
Email Address			
Phone Number		Mobile Number	

2C. Create Your HxBC Account – cont'd

NOTE: If you are a Nurse Practitioner, Registered Nurse, or Licensed Practical Nurse please click the "Nurse," profession under "select your profession."

ielect Profession	
select Profession Chiropractor Corporate Admin	
Diagnostic Medical Sonographer	
Medical Lab Technologist (CBS Only) Medical Office Assistant Medical Radiation Technologist Midwife Nurse Nurse Nutritionist Decupational Therapist Desteopath Pharmacist Desteopath	Mobile Number
Physicitherapist Social Worker Oblog	I following Health Authorities: VCH, PHS

Please Select your Profession	College ID (BCCNM ID)#
Nurse	0000000
Please select your license type	MSP Billing#
O Nurse Practitioner	(e.g. A0000 or 00000)
○ Registered Nurse	
O Licensed Practical Nurse	
O Registered Psychiatric Nurse	

2C. Create Your HxBC Account - cont'd

Setup Accou	nt			
Please provide a	username and password you would	like to use for this account	We	
recommend sele	ting a username based on your nam	e. For Example: john.smith		
Username				
	Verify Name			
Password				
			<u> </u>	
Confirm Passwo	d			
			•	

Health Authority Network Account: If you answer Yes to having a Health Authority account, you may be required to register for CareConnect access through a different process.

Set Up Account: In this section, enter a unique username and complex password.

Hello PHSAPOC Dalia EIGHTEEN,

You just Registered for a Self Service Portal Account.

Your new Username is: HXBC \ dalia18

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

Once you click **Register**, you will receive an email confirming the creation of your account.

2D. Three Ways to Join an Existing Worksite

There are several ways you can join a worksite:



NOTE: If your worksite has not been created yet, refer to How to Register a Worksite as a Group / Site Administrator

2E. OPTION 1: Join an Existing Worksite via Notification Centre

After you submit your HxBC account registration form, return to the **Main Menu**.

- In the red banner, click Manage Requests.
- In the Notification Centre, click **Accept** to join a worksite.



Requests Requiring your action

Submit Date 🔺	Description	\$ \$	÷
12/14/2022	Test User has invited you to Worksite Victoria Clinic. Would you like to accept?	Accept	Reject
Showing 1 to 1 of 1	entries	Previous	1 Next

2F. OPTION 2: Join an Existing Worksite by Worksite ID

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

I was provided a worksite code to register with

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

- 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 Group / Site Administrator, which will also include the Worksite ID.

1. Join an existing worksite by Worksite ID

was provided a worksite code to reg	jister with	^
Please enter the worksite	code you were provided here:	
K4T6CLP		
Return lenu	Continue	
Hello PHSAPO		
You just registered yo	worksite for access to CareConnect.	
Your new Worksite is	s: Kingsgate Mall Clinic	
Your Worksite Id is	K4T6CLP	
If you didn't make this	s change, please contact CareConnect@phsa.ca	

2G. OPTION 3: 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

I was provided a worksite code to register with

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

- As you type your address in the search bar, Canada Post validated addresses will appear.
- Select the specific address and unit for your worksite and press **Continue**.

	a has a diducer
I like to create an new worksite, or search for my worksit	te by address
lease enter your worksite address:	
370 Broadway E	^
100-370 Broadway E Vancouver, BC, V57 4G5	
01-370 Broadway E Vancouver, BC, V5T 4G5	
101A-370 Broadway E Vancouver, BC, V5T 4G5	
02-370 Broadway E Vancouver, BC, V57 4G5	
102-370 Broadway E Vancouver, BC, V5T 4G5 103-370 Broadway E Vancouver, BC, V5T 4G5	
102-370 Broadway E Vancouver, BC, V5T 4G5 103-370 Broadway E Vancouver, BC, V5T 4G5 104-370 Broadway E Vancouver, BC, V5T 4G5	

NOTE: If your worksite does not appear after this search and you do not have a worksite ID code, refer to the instructions for <u>How to Register a Worksite as a Site Administrator</u>

2H. 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.



21. 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 <u>My.CareConnect</u> to approve their request.

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

CareConnect Enrolment: Next Steps

The next step is to complete your Privacy & Security Requirements.



Prior to requesting access to CareConnect, you will be required to completed:

- Privacy and Security Training for Community Care Providers this is mandatory for all users.
- HPCAA (Health Practitioner CareConnect Access Agreement) At this time only Physicians, Nurse Practitioners, RN's, LPN's, RPN's, Social Workers and Pharmacists are required to complete this agreement.



3: Apply for CareConnect Access





3A. Open the Individual Application Access Module

In the CareConnect portal, users with a verified worksite will see the new **Application Access** module. Under this module, click the **View Application** button.



3B. Request CareConnect Access

- After clicking on the View Application button, you will see the CareConnect module. Click on the Request CareConnect Access button.
- This will open the CareConnect **Enrolment Form.**
- Fill out the form and ensure that you answer the highlighted questions.
- Once you click on the **Submit** button, you should receive a notification indicating that "Your CareConnect request has been submitted and is pending approval."

		CareConnect Enrolment Form
	Registered Clinic(s)	
	Kingsgate Mall Clinic	
		Ai
	Last Name	First Name
nnect	Eighteen	Dalia
	Јор	College ID
CareConnect		
rt Access	Physician The information provided on this for Trequire CareConnect access to sup care. I understand and acknowledge t research, quality improvement or qua The line with the Ministry of Waytho	rm is correct port my job duties, and will only access CareConnect in support of direct nat this request does not include access for purposes of secondary use lity assurance purposes.
Connect Access	Physician The information provided on this for Trequire CareConnect access to sup care. I understand and acknowledge to research, quality improvement or qua In line with the Ministry of Health p review, please expect to be contacted	rm is correct port my job duties, and will only access CareConnect in support of direct nat this request does not include access for purposes of secondary use lity assurance purposes. olicy, a review of every user's access is required annually. As part of this to review and confirm if access is still required
ect Access	Physician The information provided on this for The information provided on this for Trequire CareConnect access to sup Care. I understand and acknowledge t research, quality improvement or qua In line with the Ministry of Health p review, please expect to be contacted I require access to CareConnect to ade Select	m is correct port my job duties, and will only access CareConnect in support of direct nat this request does not include access for purposes of secondary use lity assurance purposes. Olicy, a review of every user's access is required annually. As part of this to review and confirm if access is still required quately perform my job duties
t Access	Physician The information provided on this fo The information provided on this fo Trequire CareConnect access to sup Care. I understand and acknowledge t research, quality improvement or qua In line with the Ministry of Health p review, please expect to be contacted I require access to CareConnect to add Select I require access to CareConnect to pro-	m is correct port my job duties, and will only access CareConnect in support of direct nat this request does not include access for purposes of secondary use lity assurance purposes. olicy, a review of every user's access is required annually. As part of thi to review and confirm if access is still required quately perform my job duties vide / support direct patient care
ect Access	Physician The information provided on this fo Trequire CareConnect access to sup Care. I understand and acknowledge t research, quality improvement or qua In line with the Ministry of Health p review, please expect to be contacted I require access to CareConnect to ade Select I require access to CareConnect to pro Select	m is correct port my job duties, and will only access CareConnect in support of direct hat this request does not include access for purposes of secondary use lity assurance purposes. olicy, a review of every user's access is required annually. As part of thi to review and confirm if access is still required quately perform my job duties vide / support direct patient care
Access	Physician	m is correct port my job duties, and will only access CareConnect in support of direct nat this request does not include access for purposes of secondary use lity assurance purposes. olicy, a review of every user's access is required annually. As part of this to review and confirm if access is still required quately perform my job duties vide / support direct patient care

3C. Request Processed by the 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.
- Please expect to be contacted for any outstanding information that is required as part of the enrolment steps.



4: Authorize an On-Behalf-of User to Access CareConnect





4A. Options for Authorizing an On-Behalf-Of User

As an Authorizer, you may approve another worksite member to work on your behalf. By authorizing a user, they will be granted the same access as you and you take responsibility for the patient information they will be able to view. There are several ways you can grant or approve CareConnect access for On-Behalf-Of Users as an Authorizer.



NOTE: Both the Authorizer and On-Behalf-Of User must join a worksite prior to this step. Authorizers may grant access (Option A) or approve requests from On-Behalf-Of Users (Options B or C).

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4B. OPTION 1: Authorize an On-Behalf-Of User via Worksite Access

- To grant an On-Behalf-Of User access to CareConnect, open the Worksite Access module
- Select the My On-Behalf-of-Users tab
- Click on the +Authorize A User button
- Select the user you wish to sponsor and click Add Sponsorship
- Click on Return to Menu

Worksite Access View and Manage access in your Worksite Update \ Review Worksite	(s) Request and access applications i.e. CareConnect, Forms View Application	S Manage My Account / Preferences Reset My Password Look Up My Username Update My Contact Information Manage My Account
Active Members Inactive Members	Worksite Help Edit Worksite Invite Members People I have Authoriz Type S	s Sponso ships My On-behalf-Of Users Worksite Apps zed tatus
	+ Authorize A User	Sponsor A User × Add a user to be sponsored by you Greg MOA Add Sponsorship Close
	Return to Menu	

4C. OPTION 2: Authorize an On-Behalf-of User via Email Invitation

- If an On-Behalf-Of User has requested sponsorship, the Authorizer selected by the On-Behalf-of-User will receive the following email, asking them to approve access
- Simply click the <u>link</u> to authorize the requesting 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

4D. OPTION 3: Approve an On-Behalf-of User via Portal Notification



you



5: Manage your Account or Reset Your Password





5A. Open the Manage My Account / Preferences Module

In the CareConnect portal, users can update their information by clicking on Manage My Account in the Manage My Account / Preferences module.



5B. Lookup Your Username

Manage My Account The following options are available to manage your account **Q** Forgot My Username Click here if you forgot your HxBC username. Reset My Password Click here to Reset your HxBC Password. Ly Update My Information Click here to update your information for your account. **Return to Menu**

If you have forgotten your username (used to log into my.CareConnect), click on Forgot my Uesrname to view this information.

Forgot My Username				
My Username:				
jillian.chiam2				
Login Steps				
Proceed to CareConnect and select the HxBC Account Option:				
Sign in with one of these accounts				
BC Services Card				
Health Authority Account				
HxBC Account				
Return to Menu				

5C. Reset Your Password



Click on the **Reset my Password** option and follow the prompts to enter a new password. We recommend that you select a complex password that is minimum 12 characters long and that you update it semi-regularly.

Reset My Password

User Name:

You will be resetting the password for HXBC\testphsapoc44

Password Requirements

Passwords must contain 12 or more characters, Should have upper and lowercase letters, and at least one number, or special character (e.g. !#\$%^&*). Your password must not contain patterns or sequences you've used before. Must not be a single work as it appears in the dictionary, and should not contain information easily connected to you (e.g., birthday, phone number, spouses's name, home address).

New Password

Select your new password.	
New Password:	
Confirm Password:	
Return to Menu	Reset Password

5D. Update My Information



- Click on the **Update My Information** option to edit your contact info.
- Edit the relevant fields and press **Update** to save.

Contact Information

In the event of an issue with your account the following information will be utilized to contact you. Please keep this information

Preferred First Name		Preferred Last Name	
test	•	user	
Email Address			
test@gmail.com			
Phone Number		Mobile Number	
(778) 888-9999 NOTE: This should be the best phone number to reach y Selected Profession	you at	(778) 234-5678 CPSID	
(778) 888-9999 NOTE: This should be the best phone number to reach y Selected Profession Physician	/ou at	(778) 234-5678 CPSID	
(778) 888-9999 NOTE: This should be the best phone number to reach y Selected Profession Physician	/ou at	(778) 234-5678 CPSID MSP Billing#	
(778) 888-9999 NOTE: This should be the best phone number to reach y Selected Profession Physician	/ou at	(778) 234-5678 CPSID MSP Billing# 56789	



Questions? Check out our FAQ page



