

ConnectingOntario

# ConnectingOntario

# ClinicalViewer User Guide

Release 12

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**Ontario  
Health**



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# Getting Started

## Introduction

ConnectingOntario ClinicalViewer displays content from sources across Ontario in a single web browser window, on tabs and pages. This data, which includes patient demographics, visit and encounter data, documents, reports, diagnostic imaging results, lab data from the Ontario Laboratories Information System (OLIS), dispensed drug and pharmacy services information from the Digital Health Drug Repository (DHDR), and information from the community sector, displays together in a single clinical viewer.

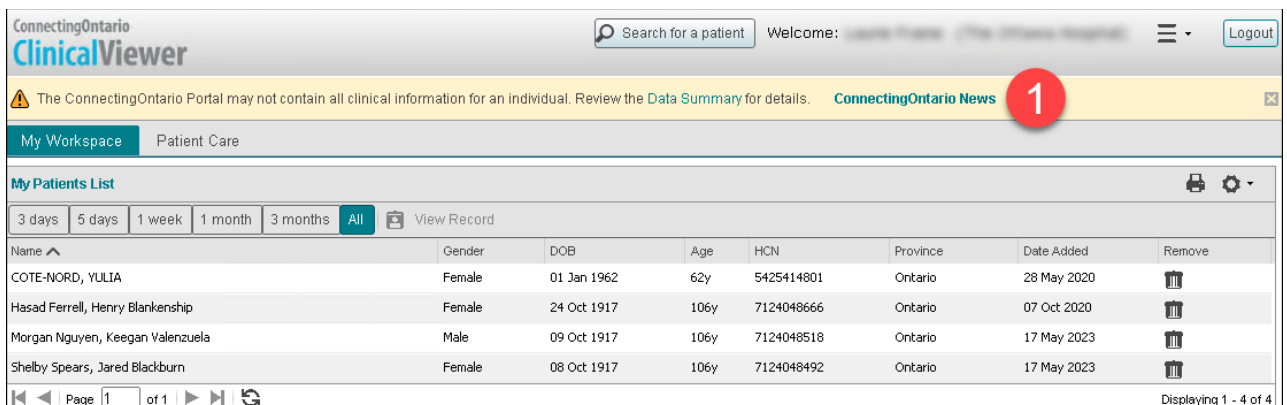
The ConnectingOntario program has optimized the ClinicalViewer to meet the needs of its users. However, given the vast range of health care providers using the ClinicalViewer, users can customize their views to meet their needs.

This guide outlines the functionality available in Release 12 of the ClinicalViewer. The software functionality will continue to evolve and expand with future releases.

All examples and screenshots contained within this guide are simulated with mock data; no real patient data is present.

## What's New in Release 12

1. **News Link on the Header** – A new link entitled “Connecting Ontario News” has been added to the header. Select this link to review the latest information regarding the ConnectingOntario ClinicalViewer, such as release contents, upcoming planned downtimes, etc.



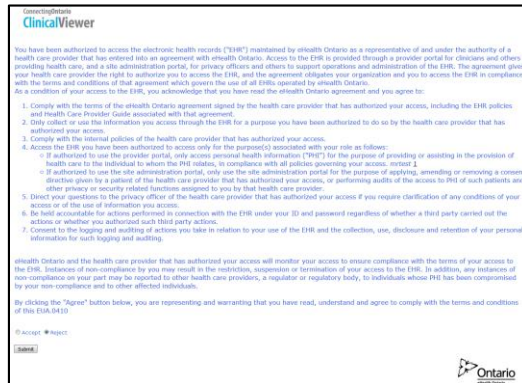
The screenshot shows the ConnectingOntario ClinicalViewer interface. At the top, there is a search bar and a welcome message. A yellow banner with a warning icon and a red circle containing the number '1' highlights a new link labeled 'ConnectingOntario News'. Below the banner, there are tabs for 'My Workspace' and 'Patient Care'. The main content area is titled 'My Patients List' and contains a table of patient records. The table has columns for Name, Gender, DOB, Age, HCN, Province, Date Added, and Remove. The data rows are as follows:

Name	Gender	DOB	Age	HCN	Province	Date Added	Remove
COTE-NORD, YULIA	Female	01 Jan 1962	62y	5425414801	Ontario	28 May 2020	
Hasad Ferrell, Henry Blankenship	Female	24 Oct 1917	106y	7124048666	Ontario	07 Oct 2020	
Morgan Nguyen, Keegan Valenzuela	Male	09 Oct 1917	106y	7124048518	Ontario	17 May 2023	
Shelby Spears, Jared Blackburn	Female	08 Oct 1917	106y	7124048492	Ontario	17 May 2023	

At the bottom of the table, there is a pagination control showing 'Page 1 of 1' and a 'Displaying 1 - 4 of 4' indicator.

# Security/Privacy

Your privacy and security obligations are outlined in the End User Agreement, which you must accept before accessing the ClinicalViewer.



End User Agreement Screen

## Accessing the ClinicalViewer

You may access the ClinicalViewer through your local health information system (HIS) or through your ONE<sup>®</sup> ID account. Your credentials are passed directly to the ClinicalViewer. If you are viewing a patient's record in your HIS, selecting on the ConnectingOntario button opens the ClinicalViewer directly to the patient's information (patient context is passed to the ClinicalViewer).

All user activity is logged and monitored.

## Supported Web Browsers

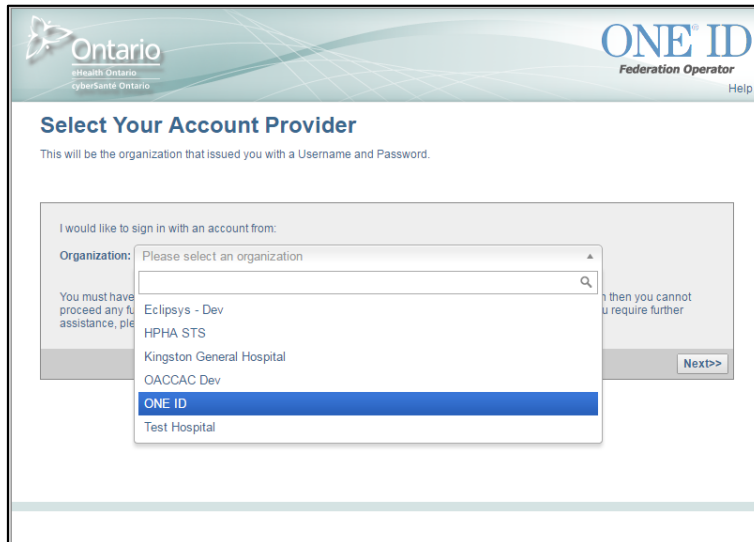
You must access the ClinicalViewer with a supported web browser: up to date versions of Microsoft Edge and Google Chrome are supported.

## Logging in from an HIS

You can have one or more ConnectingOntario icons or links embedded in your HIS system. You can select the ConnectingOntario icon/link to get to the ClinicalViewer. The physical representation of the link varies greatly from organization to organization. Refer to your organization's documentation for details.

## ONE ID Login Instructions

If you have a ONE ID account and are authorized to access the ClinicalViewer, navigate directly to the ClinicalViewer. This automatically brings you to the Ontario Health Federation Hub Identity Provider Selection Page. Select ONE ID as your organization, and then select the Next>> button.



The screenshot shows the 'Select Your Account Provider' page. At the top, there are logos for 'Ontario Health Ontario' and 'ONE ID Federation Operator'. The main heading is 'Select Your Account Provider' with a sub-note: 'This will be the organization that issued you with a Username and Password.' Below this is a form with the text 'I would like to sign in with an account from:'. The 'Organization:' label is followed by a search box containing 'Please select an organization'. A dropdown menu is open, listing several organizations: 'Eclipsys - Dev', 'HPHA STS', 'Kingston General Hospital', 'OACCAC Dev', 'ONE ID' (which is highlighted in blue), and 'Test Hospital'. To the right of the search box is a 'Next>>' button.

### Ontario Health Federation Hub Identity Provider Selection Page

This brings you to the ONE ID login page, where you enter your ONE ID credentials.



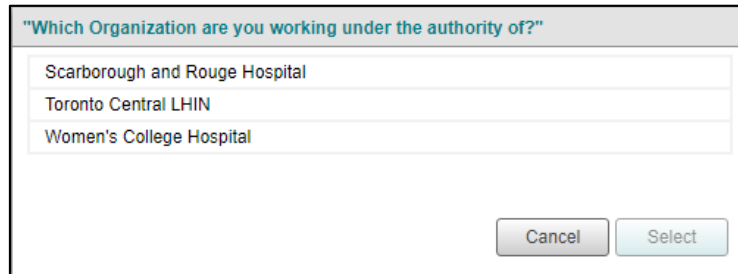
The screenshot shows the ONE ID login page. At the top, there are logos for 'Ontario Health Ontario' and 'ONE ID Identity & Access Management'. The main heading is 'ONE ID Identity & Access Management' with a sub-note: 'ONE ID identity and access management enables secure access to eHealth services.' Below this is the text 'Please log in with your login ID and password'. The login form consists of two input fields: 'Login ID' with the placeholder text 'YOUR-ID@ONEID.ON.CA' and 'Password' with masked characters. A 'Login' button is located below the password field. At the bottom of the form, there are two links: 'Forgot Login ID' and 'Forgot Password'.

### Ontario Health Federation Hub Identity Provider Login Page

After entering your login ID and password, you may also be asked to verify your identity by answering some of the security questions you selected for your ONE ID account.

## Under Authority Dialog

If you are authorized to access the ClinicalViewer by multiple participating healthcare organizations, you may be asked to select the organization under whose authority (UAO) you are working:



"Which Organization are you working under the authority of?"

- Scarborough and Rouge Hospital
- Toronto Central LHIN
- Women's College Hospital

Cancel Select

**Dialog to Specify the User's Organization**

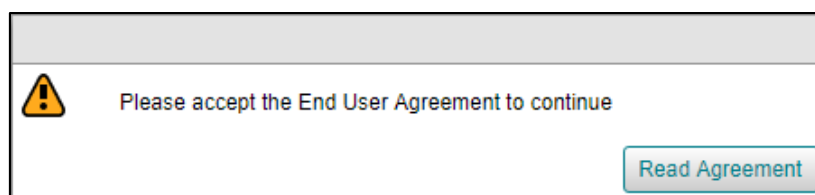
*Note:* if you are presented with the [End User Agreement](#), you will be required to select your UAO a second time to complete logging into the ClinicalViewer.


## Multiple Logins

It is not permitted for a single user to log in twice or otherwise operate two instances of the ClinicalViewer simultaneously. This prohibition extends to a single user account using different computing devices. You should logout from one instance before initiating another instance of the ClinicalViewer.

## Accepting the End User Agreement

You must accept the ConnectingOntario End User Agreement the first time you access the ClinicalViewer.



 Please accept the End User Agreement to continue

Read Agreement

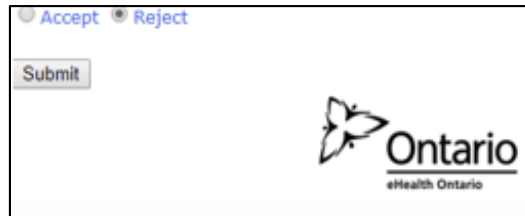
**Notice: End User Agreement Has Not Been Accepted**

This acceptance must be repeated during the first access of a new calendar year and whenever a new version of the End User Agreement is published. Select the "Accept" radio button and select the "Submit" button.

By clicking the "Agree" button below, you are representing and warranting that you have read, understand and agree to comply with the terms of this EUA.

Accept  Reject

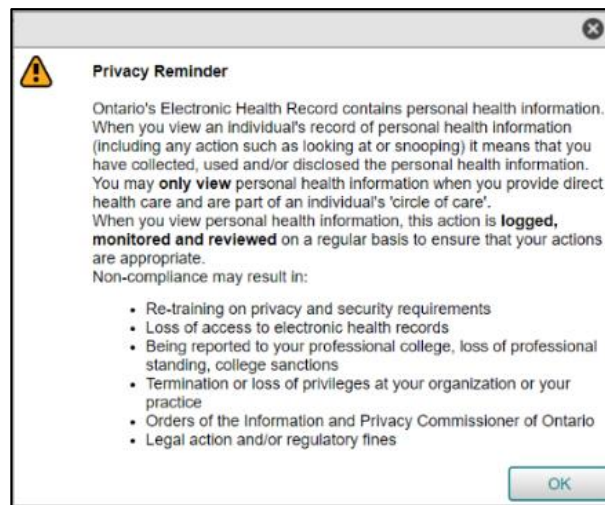
### End User Agreement Options



*Note:* if you are presented with the Under Authority Dialog prior to accepting the End User Agreement, you will be required to select your UAO a second time to complete logging into the ClinicalViewer.

## Privacy Reminder

When you first log in, the following privacy reminder displays:



### Privacy Reminder

This reminder does not display more than once in every 24 hours.

# Landing Page in ConnectingOntario ClinicalViewer

There are two different user experiences when accessing the ClinicalViewer:

1. You can access the ClinicalViewer from your HIS **with** a patient selected
2. You can access the ClinicalViewer from your HIS or using your ONEID credentials **without** a patient selected

If you access the ClinicalViewer from your HIS with a patient selected, you will land directly on the Patient Care tab with the selected patient's data visible (patient is in context).

The screenshot shows the ClinicalViewer interface for a patient named Dan Smith. The patient's information is displayed at the top, including DOB (08 Apr 1984), gender (Male), HCN (9600953476), and contact address (2 Western Road APT 213, London, ON L4G 2H6). The interface is divided into several sections:

- Timeline:** Shows a message: "You are viewing PHI that was blocked & may only use or disclose it as instructed by the patient'sSDM." It includes filters for Time Interval (Today, 7D, 30D, 3M, 6M, 1Y, Custom) and a date range from 01 Mar 2024 to 01 Mar 2010.
- Medications:** Displays a table of dispensed medications with columns for Dispensed Date, Generic Name, Brand Name, and Strength. Medications listed include COVID-19 mRNA, HYDROCODONE BITAR..., and Pymvium.
- Documents/Notes:** Shows a list of documents with columns for Document Date/Time, Document, and Description. Documents include Pain Medicine Initial Assessment and Safety Issues.
- Lab and Pathology Results:** Displays a table of lab results with columns for Collection Date/Time, Last Updated, Order ID, Ordered As, and Test. Results include estimated GFR and GFR/1.73 sq M.Pred.
- Diagnostic Imaging:** Shows a list of imaging reports with columns for Procedure Date/Time, Report, Image, Procedure Description, and Additional Information. Procedures include LASER SURF-RINGSUINAL UTF IS, INTRAVASCU... INTRAVASCU... (Intravascular Ultrasound), DIGITAL RA-RADIUS/ULNAL: DIGITAL... (Left, Digital Radiography), and RADIO FLUO-SCJOINTR: RADIO FLUO... (Stemovascular joint, R).
- Visits/Encounters and Summary Reports:** Displays a table of visits with columns for Date, Type, Organization, Visit/Encounter ID, and Summary Reports. A visit is listed for 15 Aug 2023, Inpatient, at North York General, with ID LargeHTMDSR12...

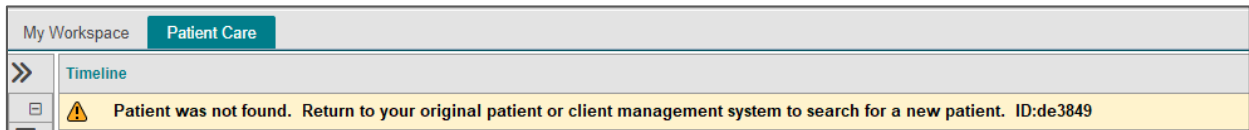
The interface also includes a search bar at the top right, a login button, and a footer with the Ontario Health logo and copyright information (© 2005-2022 Alberta Healthcare Solutions, Inc. - Integrated Patient Record 19.2.0).

## Patient Care Tab Landing Page

**Note:** If a match is not found for the patient in the ClinicalViewer, the system will launch the 'Search for a Patient' feature (Select a Patient) if allowed by the organization.

### Search for a Patient

Otherwise, if the organization does not have access to the ‘Search for a patient’ feature, an error displays on the “Patient Care” tab. In this case you will need to return to your HIS to search again, or else select a patient from either the My Patients or the My Recent Patients list on the My Workspace tab.



### Patient Not Found Error

If you access the ClinicalViewer from your HIS without a patient selected (also referred to as ‘no patient context’) or using your ONE ID credentials, you will land on the My Workspace tab. You can search in the ClinicalViewer for the patient using the ‘Search for a patient’ feature (Select a Patient) provided that your organization has not disabled this feature.

ConnectingOntario  
ClinicalViewer

Search for a patient Welcome: Bill Ford-nygh (North York General Hospital) Logout

The ConnectingOntario Portal may not contain all clinical information for an individual. Review the Data Summary for details. ConnectingOntario News

My Workspace Patient Care

My Patients List

3 days 5 days 1 week 1 month 3 months All View Record

Name	Gender	DOB	Age	HCN	Province	Date Added	Remove
OGUNS, BISI	Male	12 Dec 1961	62y	5364650035	Ontario	07 Feb 2023	
Smith, Dan	Male	08 Apr 1984	39y	9600953476	Ontario	08 Nov 2022	

Page 1 of 1

Displaying 1 - 2 of 2

My Recent Patients

3 days 5 days 1 week 1 month 3 months 1 year View Record Add to...

Name	Gender	DOB	Age	HCN	Province	Last Accessed
OGUNS, BISI	Male	12 Dec 1961	62y	5364650035	Ontario	01 Mar 2024 06:24
Christensen, Shannon	Female	10 Sep 2009	14y 5m	5821341319	Ontario	28 Feb 2024 16:52
Blackwell, Elijah	Male	05 Jun 2010	13y 8m	5821516837	Ontario	28 Feb 2024 16:43
Smith, Dan	Male	08 Apr 1984	39y	9600953476	Ontario	23 Feb 2024 09:38
King, Hearts	Male	03 May 1947	76y	5511040426	Ontario	20 Feb 2024 14:07
ReplayLastSixTwo, ReplayFirstSixTwo	Male	21 Oct 1968	55y	6397194060	Ontario	16 Feb 2024 15:42
Baldwin, Wendy	Female	04 Apr 1974	49y	5821304861	Ontario	13 Feb 2024 09:06

Page 1 of 1

Displaying 1 - 7 of 7

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Ontario Health Ontario

## My Workspace Tab Landing Page

# Log Out and Time Out

You must log out of the ClinicalViewer to abide by privacy and security obligations.

To exit the ClinicalViewer:

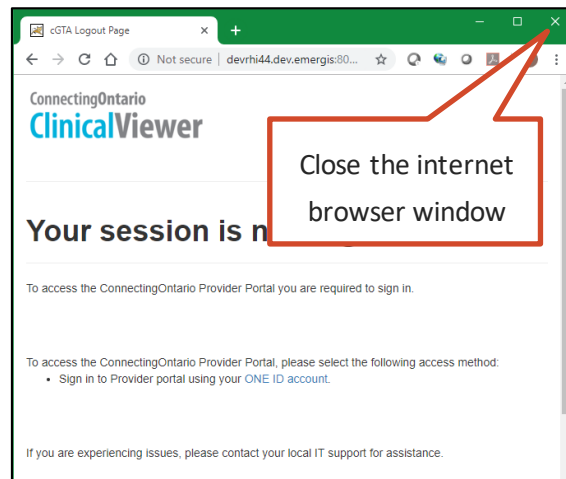
1. Select the Logout button



## Logout Button



2. After logging out, you land on the ClinicalViewer Logout page and can close the internet browser window



### Logout Page

*Note:* ONE ID users must close their browser to fully exit their active ONE ID session.

The ClinicalViewer Logout page informs you that the session is no longer active.

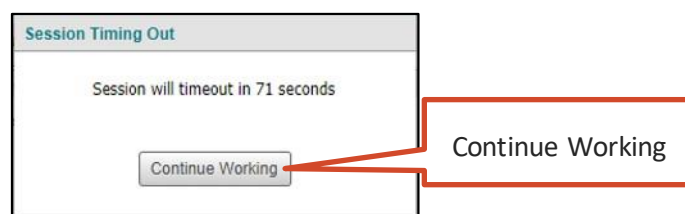
- You cannot reopen the ClinicalViewer from this page; you must return to your HIS or to another ClinicalViewer page to log in via the Ontario Health Federation Hub
- You can close the browser or navigate to another web page

*Note:* Logging out of the application from which the ClinicalViewer was opened (e.g., HIS) does not affect the logout process for the ClinicalViewer. Ensure that you have logged out of both your HIS and the ClinicalViewer.

## Timeout

You are automatically logged out of the ClinicalViewer after 15 minutes of inactivity, or after the active session exceeds 8 hours.

1. A warning message to extend the session displays before the session times out. In order to continue working, you must select Continue Working.



### Session Timeout Warning

# Working with the ClinicalViewer

The basic layout of the ClinicalViewer window is illustrated in the following sections.

## ClinicalViewer Window (ClinicalViewer Framework)

Two display windows, the My Workspace tab and Patient Care tab are available in the ClinicalViewer.

On the My Workspace tab, the ClinicalViewer has three components: header, patient lists and footer.

The screenshot shows the ClinicalViewer interface on the 'My Workspace' tab. Three red callout boxes point to specific areas: '1. Header' points to the top navigation bar; '2. Patient Lists' points to the 'My Patients List' and 'My Recent Patients' sections; '3. Footer' points to the bottom copyright and privacy information.

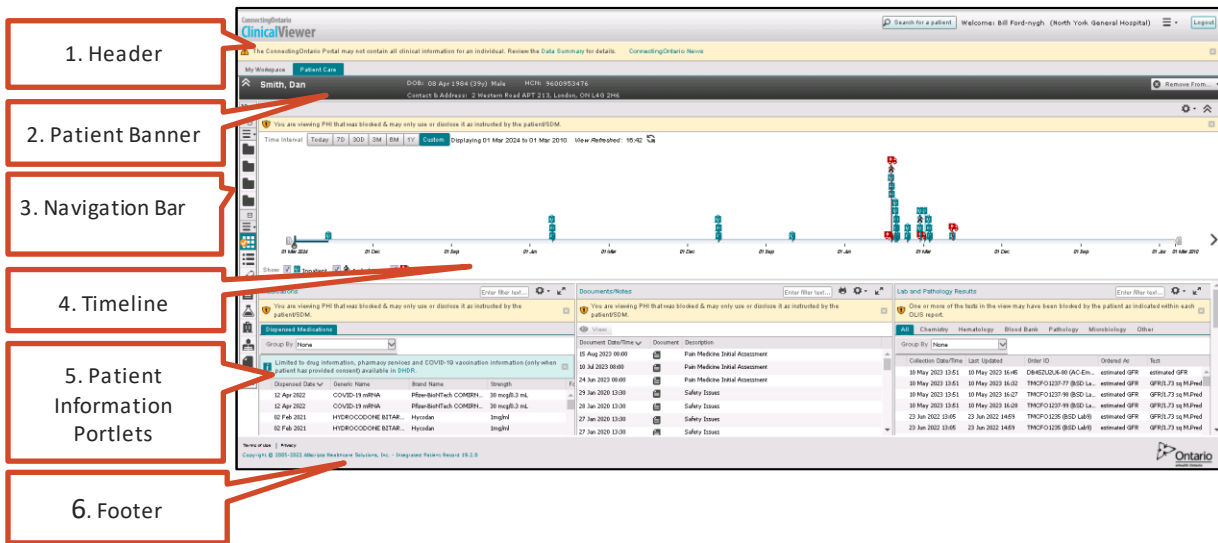
Name	Gender	DOB	Age	HCN	Province	Date Added	Remove
OGINS, BIZI	Male	12 Dec 1961	62y	538465005	Ontario	07 Feb 2023	
Smith, Dan	Male	08 Apr 1964	39y	900953476	Ontario	08 Nov 2022	

Name	Gender	DOB	Age	HCN	Province	Last Accessed
OGINS, BIZI	Male	12 Dec 1961	62y	538465005	Ontario	01 Mar 2024 06:24
Christiansen, Shannon	Female	09 Sep 2009	14y 5m	5121242319	Ontario	20 Feb 2024 16:52
Blackwell, Brian	Male	05 Jun 2000	23y 6m	6121246037	Ontario	20 Feb 2024 16:40
Smith, Dan	Male	08 Apr 1964	39y	900953476	Ontario	23 Feb 2024 09:30
King, Hearts	Male	03 May 1947	76y	551043426	Ontario	20 Feb 2024 14:07
Replay,LetTestSixTwo_ReplayFirstTestSixTwo	Male	21 Oct 1960	55y	639714480	Ontario	16 Feb 2024 15:40
Baldwin, Wendy	Female	04 Apr 1974	49y	512124681	Ontario	12 Feb 2024 09:06

### ClinicalViewer Framework, My Workspace Tab

On the Patient Care tab, the ClinicalViewer has five components: header, patient banner, navigation bar, timeline, patient information portlets, and footer.



### ClinicalViewer Framework, Patient Care Tab

Note: you may need to use the vertical scroll bar to scroll down to the bottom of the Patient Care page.


## Header

The ClinicalViewer header always remains visible. When the ClinicalViewer is first launched in the view that has been blocked by the patient as indicated within each OUS report, a yellow notification bar displays below the header with a disclaimer regarding the completeness of available patient information. To close the notification bar, select the X on the right hand side. This hides the notification for the remainder of your session.



### ClinicalViewer Header

Component	Description
Logo	ConnectingOntario ClinicalViewer logo.
Disclaimer with Data Summary and News Links	Reminder that the ConnectingOntario portal may not contain all clinical data for a given patient with a link to the Data Summary to obtain details. This banner also contains the ConnectingOntario News link that redirects the user to a web page providing the latest information about the

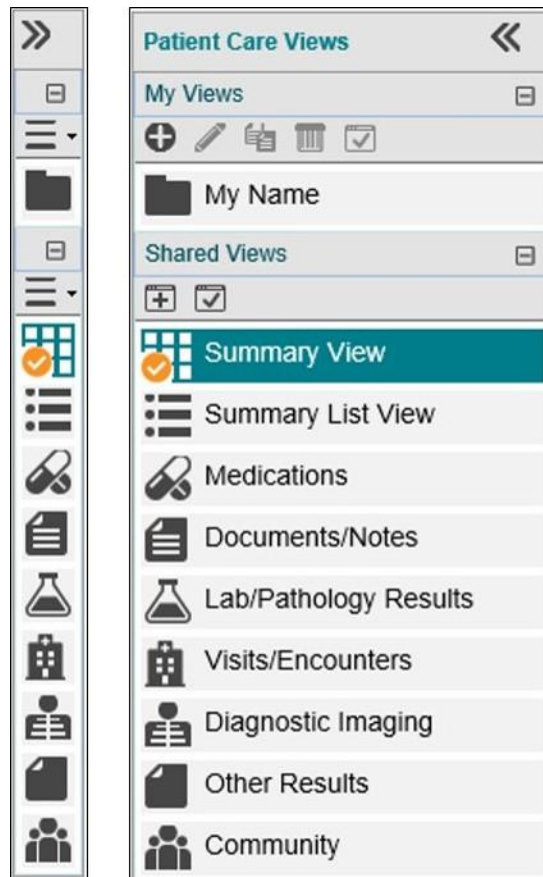
Component	Description
	ConnectingOntario ClinicalViewer, such as release contents and upcoming scheduled downtimes.
Patient Search	Selecting this button launches the search window. Refer to the Patient Search section. This button is only visible for users from organizations for which Patient Search has not been disabled.
User Name	The user's first name and last name (as provided from the source system).
User Organization	The organization under which the user has logged into and has permission to access the ClinicalViewer (e.g., University Health Network).
Drop-down list of options	<p>Hovering the mouse cursor over the menu icon displays the list of options. Selecting the menu icon hides the options again.</p> <p> There is no association between the content within the external link and the ClinicalViewer.</p> <p>This includes access to:</p> <ul style="list-style-type: none"> <li>■ Data Summary: provides a listing of data/information sources for the ClinicalViewer. The summary is divided into six information types: Acute Care, LHIN Data Summary, Lab and Pathology Results, Dispensed Medications, Diagnostic Imaging and Organizations Viewing ConnectingOntario.</li> <li>■ Help &amp; Feedback: a link to the Feedback Form</li> <li>■ Resources &amp; Training: access to the online user guides and documentation</li> <li>■ Digital Health Drug Repository (DHDR) Consent Form</li> <li>■ About ConnectingOntario: sub-menu with links to Ontario Health, Canada Health Infoway, MOHLTC, LHINs</li> </ul>
Log Out	Selecting this button logs the user out of the ClinicalViewer ( <a href="#">Log Out</a> )

## Patient Banner

See [Patient Banner](#).

## Patient Care Views Navigation Bar

The Patient Care tab has a Patient Care Views navigation bar, which displays in one of two modes: collapsed or expanded. The collapsed mode shows only the icons, but the titles are available alongside the icons in the expanded mode by selecting the double arrow **>>** icon.



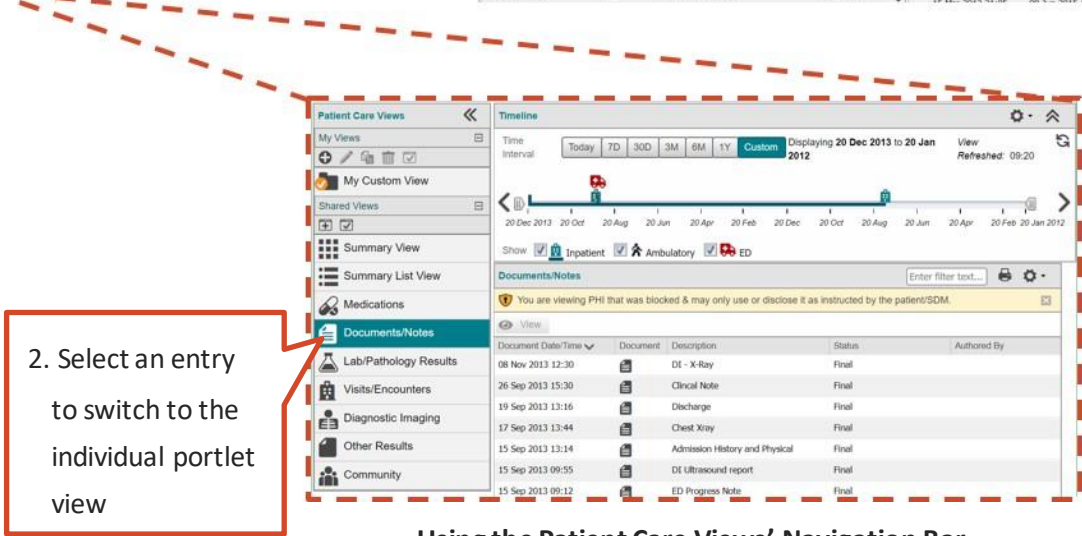
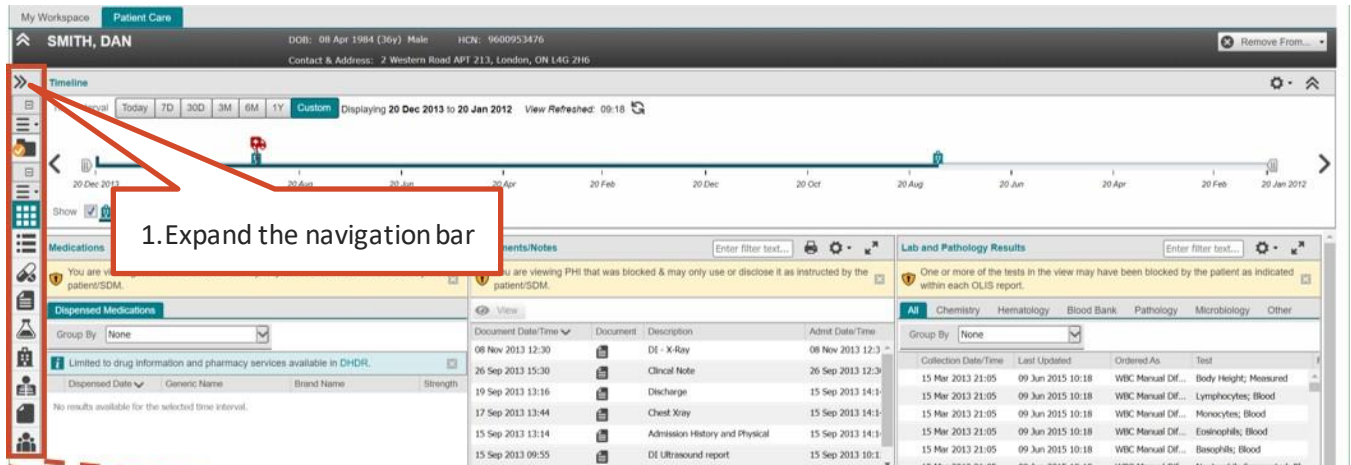
**Patient Care Views Navigation Bar; Collapsed and Expanded Modes**

The views associated with each part of the navigation bar are listed below:

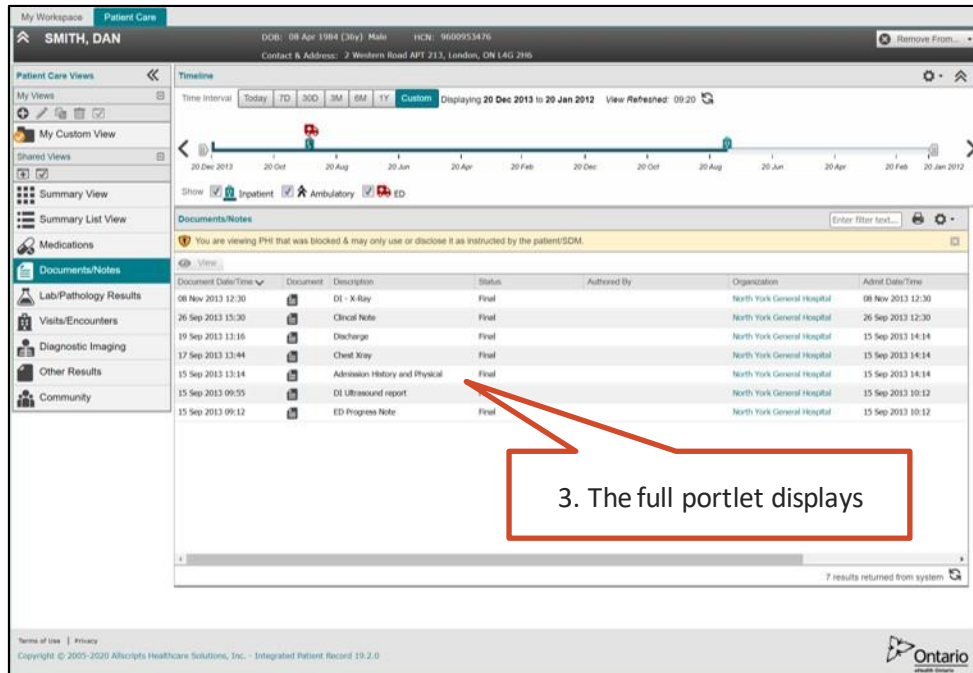
<b>View</b>	<b>Description</b>
My Name (an example of a custom view)	'My Name' is used as an example custom view above. Any custom views you have created are listed under 'My Views'
Summary View	Grid view (3 columns) of all portlets in a condensed format
Summary List View	Consolidated view (1 stacked column) of all portlets in full-size format
Medications	Full-size individual portlet display of drugs and pharmacy services information provided through the DHDR
Documents/Notes	Full-size individual portlet display of non-diagnostic documents and notes
Lab/Pathology Results	Full-size individual portlet display of lab and pathology results provided through OLIS
Visits/Encounters	Full-size individual portlet display of visits and encounters and summary reports
Diagnostic Imaging	Full-size individual portlet display of diagnostic imaging information. Provides access to both images and reports
Other Results	Full-size individual portlet display of other diagnostic results
Community	Full-size individual portlet display of LHIN home and community care services information

To move between the different views:

1. Locate and expand (if desired) the Patient Care Views navigation bar at the left of the screen
2. Select the view of interest
3. The selected view displays



Using the Patient Care Views' Navigation Bar



### Using the Patient Care Views Navigation Bar; Full Portlet View

## Timeline

See [Timeline](#).

## Patient Information Portlets

See [Clinical Data Components](#).

## Footer

You can access ConnectingOntario information in the footer links (Terms of Use and Privacy). Select a link to open a new internet window or tab displaying the selected content.



### ClinicalViewer Footer



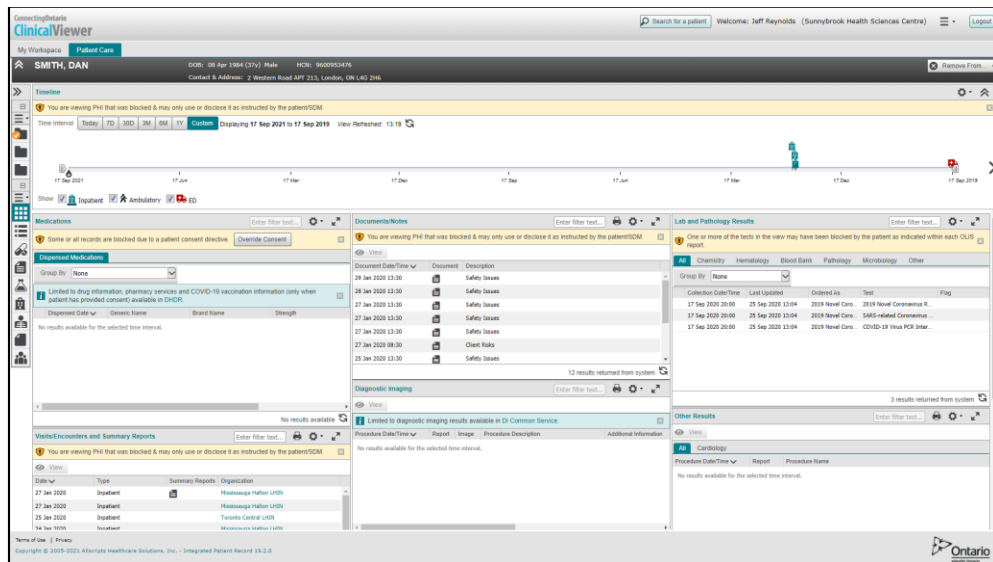
# Functional Overview

The following sections describe how to navigate and adjust the view of the information that resides within the portlets.



## General Navigation

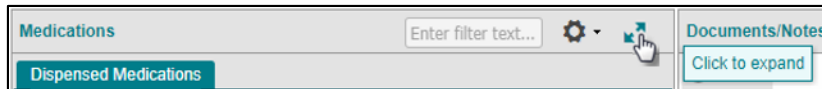
Within the ClinicalViewer, portlets group together meaningful categories of patient information. There are four ways to view the same portlet.

1. Condensed view of the portlets on the [Summary View](#) page: in the condensed view, all portlets display with only select columns of patient information in each portlet by default.

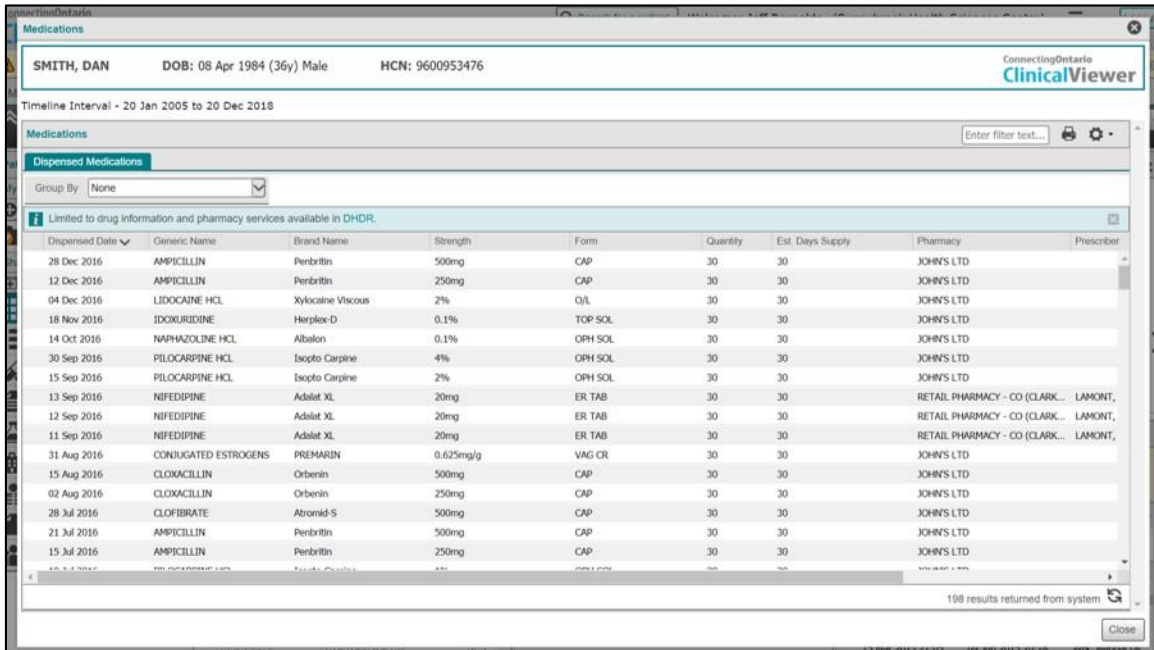


### Condensed Portlet View

2. Expanded Portlet View from [Summary View](#) page (3-column format only): in the condensed view, each portlet has an expand icon  in its header bar that expands the portlet to 95% of the screen width and height. When expanded, the portlet opens modally with the same patient banner from the Summary View. The column configuration, filtering, printing capability and refresh functionality are the same as in the Summary View. If you change preferences while in the expanded portlet view, your changes will apply to the single component view for that portlet when the expanded view is closed. You can close the expanded portlet by selecting the  in the top right corner of the expanded portlet header.



### Expand Icon in the Portlet Header Bar in 3-Column Summary View



### Expanded Portlet Opened Modally from 3-Column Summary View

3. In the Summary List View: the full version of every portlet is available, stacked one on top of the other. Use the scroll bar on the far right hand side to view every portlet.

The screenshot shows the ClinicalViewer interface for patient SMITH, DAN. The left sidebar contains various portlets: My Views, My Custom View, Shared Views, Summary View, Summary List View (highlighted), Medications, Documents/Notes, Lab/Pathology Results, Visits/Encounters, Diagnostic Imaging, Other Results, and Community. The main area shows a timeline from Dec 2016 to Jan 2016, and a table of dispensed medications. A red box highlights the text: "Full view of all portlets in a 1-column format".

Dispensed Date	Generic Name	Brand Name	Strength	Form	Quantity	Est. Days Supply	Pharmacy
04 Dec 2016	LIDOCAINE HCL	Xylocaine Viscous	2%	O/L	30	30	JOHNS LTD
18 Nov 2016	IDOXURIDINE	Herplex-D	0.1%	TOP SOL	30	30	JOHNS LTD
14 Oct 2016	NAPHAZOLINE HCL	Albelon	0.1%	OPH SOL	30	30	JOHNS LTD
30 Sep 2016	PILOCARPINE HCL	Isopto Carpine	4%	OPH SOL	30	30	JOHNS LTD
15 Sep 2016	PILOCARPINE HCL	Isopto Carpine	2%	OPH SOL	30	30	JOHNS LTD
13 Sep 2016	NIFEDIPINE	Adalat XL	20mg	ER TAB	30	30	RETAIL PHARMACY - CO
12 Sep 2016	NIFEDIPINE	Adalat XL	20mg	ER TAB	30	30	RETAIL PHARMACY - CO
	DIETHYLSTILBESTROL	Adalat XL	20mg	ER TAB	30	30	RETAIL PHARMACY - CO
	DIETHYLSTILBESTROL	PREMARIN	0.625mg/g	VAG CR	30	30	JOHNS LTD
	DIETHYLSTILBESTROL	Orberin	500mg	CAP	30	30	JOHNS LTD
	DIETHYLSTILBESTROL	Orberin	250mg	CAP	30	30	JOHNS LTD
	DIETHYLSTILBESTROL	Atromid-S	500mg	CAP	30	30	JOHNS LTD
	DIETHYLSTILBESTROL	Penbritin	500mg	CAP	30	30	JOHNS LTD
	DIETHYLSTILBESTROL	Penbritin	250mg	CAP	30	30	JOHNS LTD

**Summary List View**

Portlets appear in the Summary List View in the following order:

- Medications
- Documents/Notes
- Lab and Pathology Results
- Visits/Encounters and Summary Reports
- Diagnostic Imaging
- Other Results
- Community

- A full-size individual view of the portlet is also available (e.g., the Lab and Pathology Results page)

**Individual Portlet View**

*Note:* More columns of information are available in the portlets when viewed in the Summary List View or full-size individual portlet.

## Portlet Continuous Scrolling

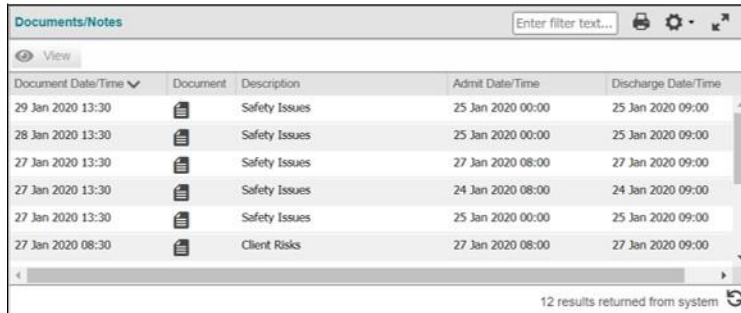
Each portlet shows a predefined number of results; you can view retrieved information by using the vertical scroll bar in each portlet. You can use continuous scrolling in both the condensed and full-size views.

Because large amounts of data may be retrieved, data is loaded in chunks and is sorted as it displays:

**Loading Message before Data is Available (Left), after Partial Load (Center) and when Complete (Right)**

## Data Refresh

To refresh the data displayed within a portlet, select the Refresh icon in the bottom right corner.



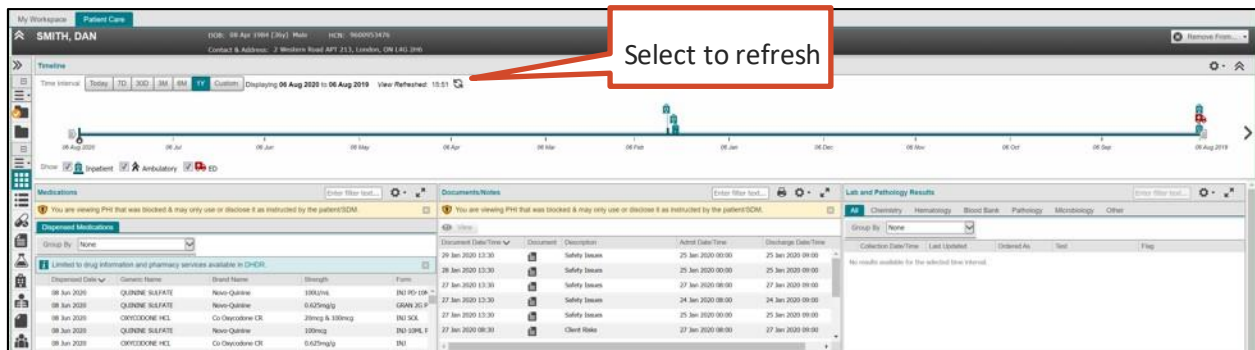
Document Date/Time	Document	Description	Admit Date/Time	Discharge Date/Time
29 Jan 2020 13:30		Safety Issues	25 Jan 2020 00:00	25 Jan 2020 09:00
28 Jan 2020 13:30		Safety Issues	25 Jan 2020 00:00	25 Jan 2020 09:00
27 Jan 2020 13:30		Safety Issues	27 Jan 2020 08:00	27 Jan 2020 09:00
27 Jan 2020 13:30		Safety Issues	24 Jan 2020 08:00	24 Jan 2020 09:00
27 Jan 2020 13:30		Safety Issues	25 Jan 2020 00:00	25 Jan 2020 09:00
27 Jan 2020 08:30		Client Risks	27 Jan 2020 08:00	27 Jan 2020 09:00

12 results returned from system

Select to refresh

### Portlet Refresh

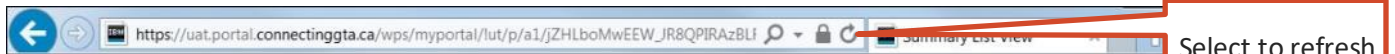
To refresh all data currently being displayed in the ClinicalViewer, select the Refresh icon to the right of the "View Refreshed" timestamp.



Select to refresh

### Timeline Refresh

To refresh the web browser window, Select the Refresh icon beside the web address (URL) or press F5 on the keyboard.



### Browser Refresh Button

## Managing List Columns

You can quickly change the display properties of most lists. When a list of items first displays, the system uses pre-configured defaults. Changes to display settings as described below are temporary and are not saved when navigating away from the page. To make a change that persists, see the [User Preferences section](#).

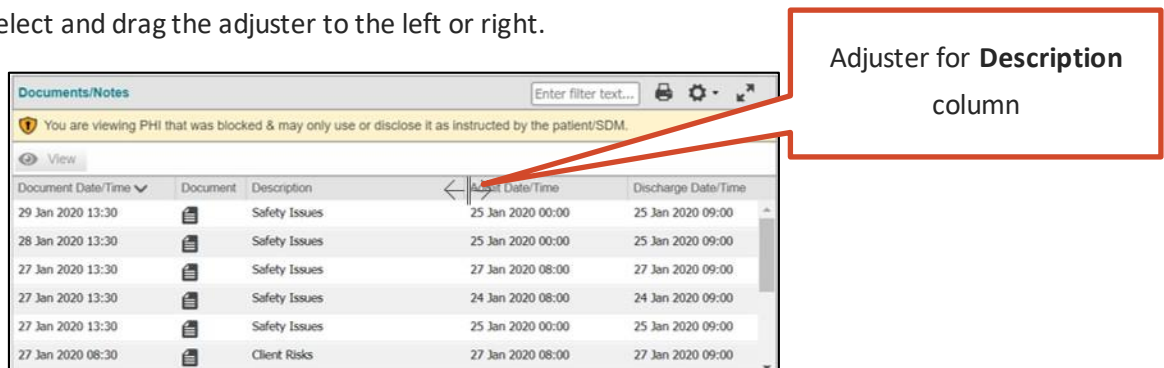
Temporary preferences available are:

- Adjusting column widths
- Hiding or displaying columns
- Sorting the list by most columns in ascending or descending order
- Filtering individual columns
- Filtering records

## Column Width

When a value is too long to fit within a column, an ellipsis (...) appears in the column to indicate that there is additional data.

To adjust the size of the column, hover the mouse pointer over the right edge of the column heading until the  $\leftarrow\rightarrow$  adjuster appears. Select and drag the adjuster to the left or right.

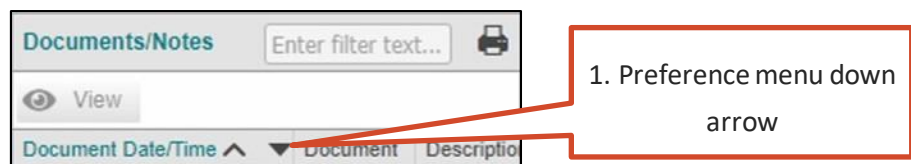


Column Width Adjuster

## Hide or Show Columns

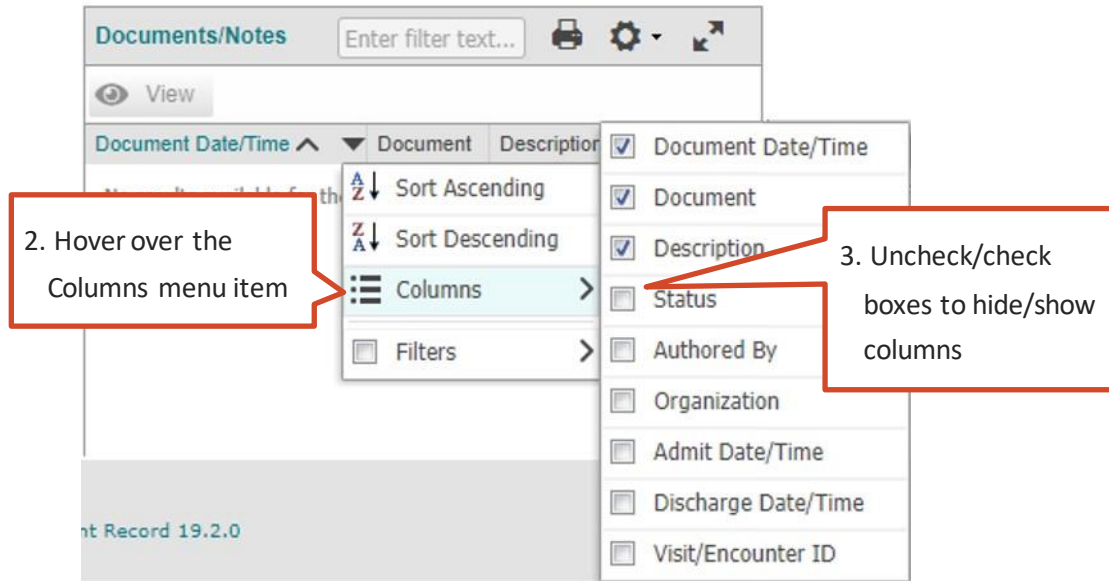
To temporarily hide or show columns in a portlet:

1. Hover the pointer over any column header until the down arrow ▼ appears. Select the arrow to display the menu.



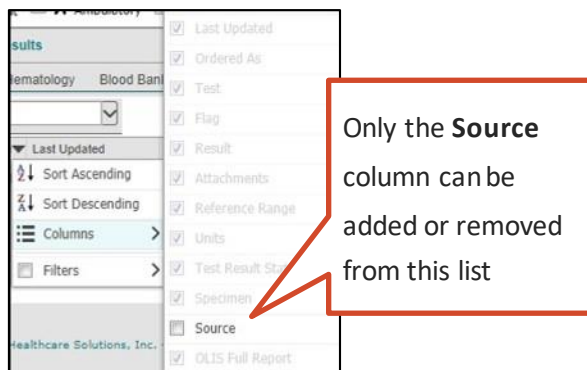
Down Arrow for the Preferences Menu

2. Hover over Columns to show the list of columns.
3. Uncheck/check the boxes to hide/show the desired columns in the list. Select anywhere outside the menu to close it.



**Columns List**

*Note:* some columns cannot be hidden; they appear in the list as greyed out items.



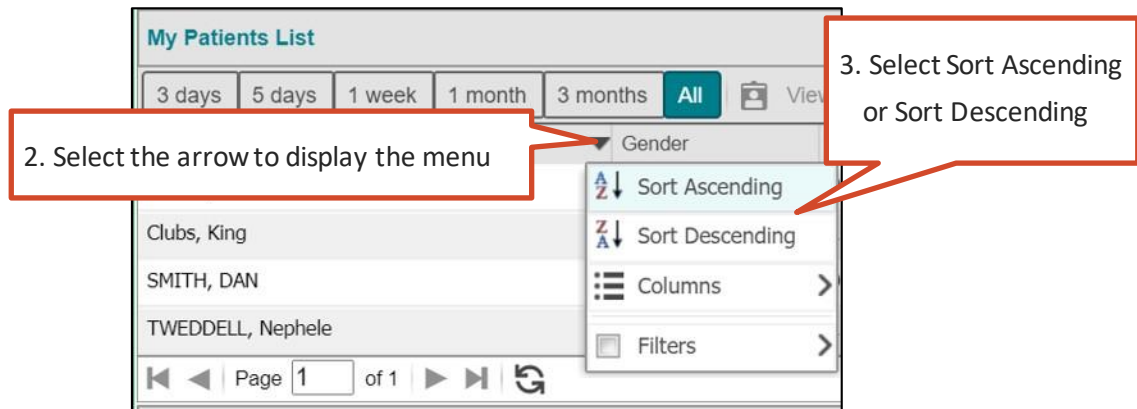
**Locked Columns**

## Sorting

When first displayed, list information is sorted by the specified default column in either ascending or descending order. This is identified by a small arrow in the specified column header.

To change the sort order, or to sort on a different column, use either of the following methods:

- A. Select the column heading, which sorts the column in ascending order. Select the column heading again to sort in descending order. In other words, Selecting the column heading acts as a toggle to switch between ascending and descending order.
- B. Use the menu:
  1. Hover the pointer over the column header until the down arrow ▼ appears
  2. Select the arrow to display the preferences menu
  3. Select either Sort Ascending (A-Z and 0-9) or Sort Descending (Z-A and 9-0)



### Sorting

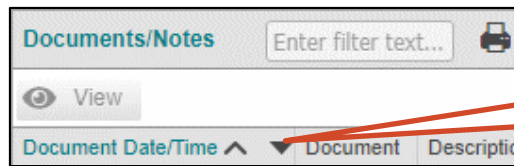
## Applying Filters to Individual Columns

In columns where filtering is available, you can filter the information within the column to show only specific items. The filter is available from the Preferences menu in the column header.

To filter a column:

1. Hover the pointer over the column header until the down arrow ▼ appears
2. Select the arrow to display the preferences menu
3. Hover over Filters to show the filter selection list. The type of filter available is dependent on the data type of the column: Date, Age, Free Text, Selection or Checkbox.





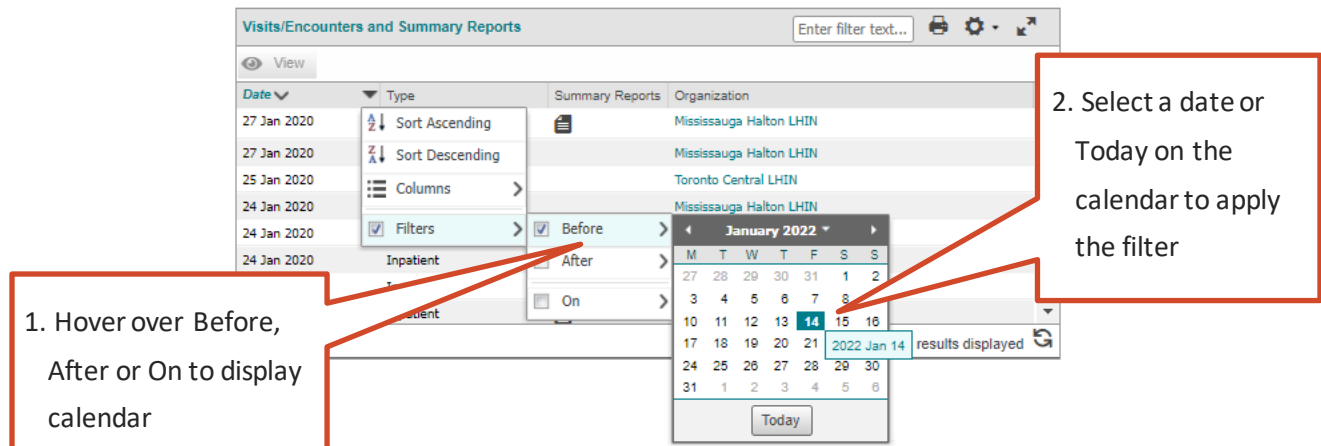
### Down Arrow to Filter Preferences

*Note:* You can apply filters to multiple columns at the same time.

## Date/Time Filtering

This method can be used for any column containing date/time data.

1. Hover the pointer over Before, After or On to display the calendar
2. Select a date (e.g., May 24, 2019) on the calendar or select Today. The ClinicalViewer automatically checks both required boxes to apply the filter (i.e., **Filters** and **Before** are both checked). The ClinicalViewer filters the column data immediately and the menu closes.



### Date Filters

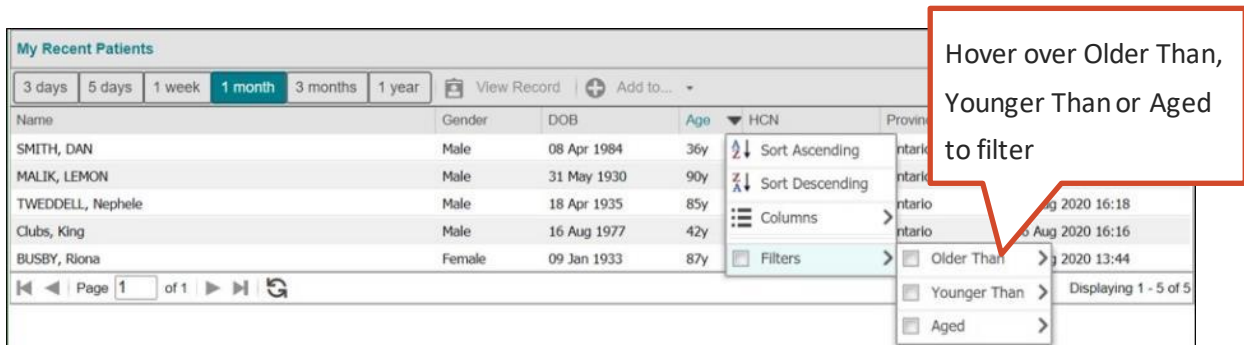
3. To apply a filter range (e. g., from Dec 16, 2013 to March 10, 2014), follow the steps above and select Before to specify the end of the date range and then repeat, selecting After to specify the start of the date range.

*Note:* The 'On' filter is exclusive and cannot be combined with the 'Before' or 'After' filters. It is used to filter for entries of a specific date.

## Age Filtering

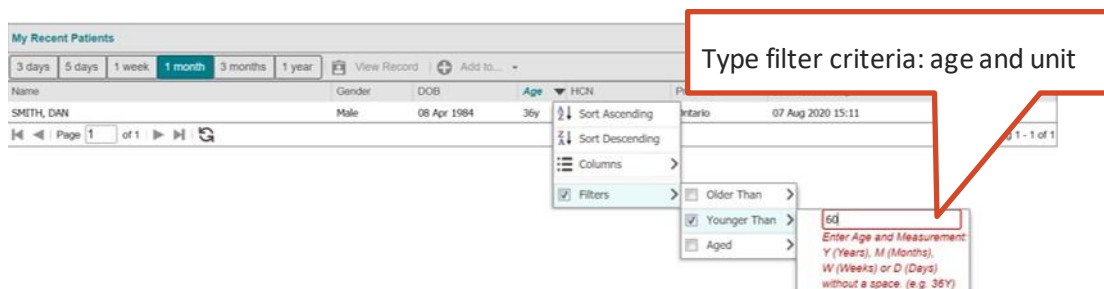
This method can be applied to any **Age** column in the ClinicalViewer.

1. Hover the pointer over Filters
2. Hover the pointer over Older Than, Younger Than or Aged to display the text box



### Age Filtering Menu

3. Enter the age in years, months, weeks, or days (e.g., 68Y or 18M) into the text box; as soon as you begin typing a hint displays with the correct format to use for the age. The ClinicalViewer automatically checks both required boxes to apply the filter (i.e., Older Than and Filters are both checked). The ClinicalViewer filters the column data immediately.



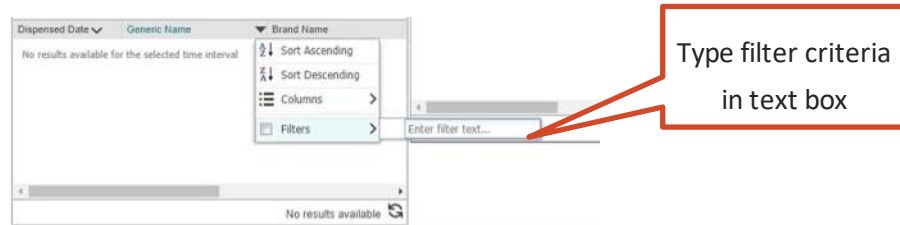
### Age Filtering, Text Box

*Note:* Filter criteria must include the age and the unit. Valid units are listed below.

Unit	Description
Y	Years
M	Months
W	Weeks
D	Days

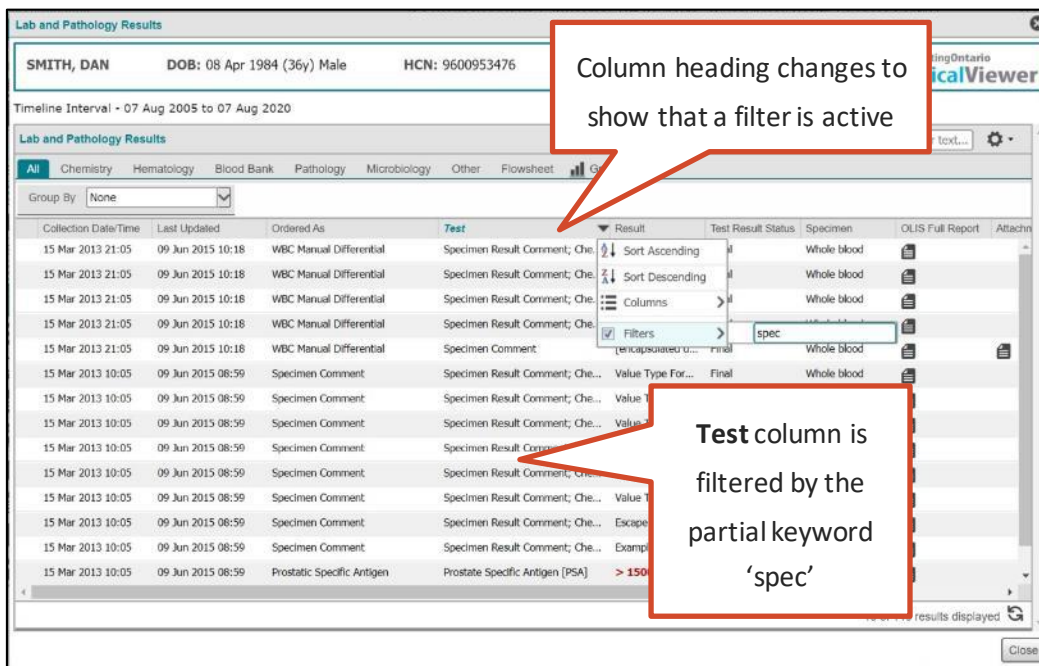
This method is employed on the majority of columns in the ClinicalViewer. You can define the filter criteria by typing text directly into the free text box.

1. Hover the pointer over Filters
2. Enter text (filter criteria) into the text box



### Free Text Filter

3. As soon as you start typing, the ClinicalViewer automatically checks the Filters box and the filter is applied to the column data.



### Free Text Filter Applied

4. To close the menu, select anywhere outside of the menu.

## Selection Filtering

Use this method for columns where the filtering options are restricted. Currently, the only column it applies to is the **Flag** column within the Lab and Pathology Results portlet.

1. Hover over the Filters menu and select the appropriate selection
2. The filter is immediately applied to the column and the menu closes

The screenshot shows the 'Lab and Pathology Results' portlet for patient SMITH, DAN. A dropdown menu is open over the 'Flag' column, with 'Abnormal' selected. A red callout box points to the 'Abnormal' option with the text: 'Flag column is filtered to display only 'Abnormal' results'.

Collection Date/Time	Last Updated	Ordered As	Test	Result	Test Result Status	Specimen	CLIS Full Report	Attachments	Flag	Units	Reference Range
15 Mar 2013 21:05	09 Jun 2015 10:18	WBC Manual Differential	Neutrophils Segmented, Blood	0.2	Final	Whole blood			LL		>7.50
15 Mar 2013 21:05	09 Jun 2015 10:18	Complete Blood Count	Platelets, Blood	46	Final	Whole blood			LL		400
15 Mar 2013 10:05	09 Jun 2015 08:59	Electrolytes	Chloride	0.1234567890	Final	Urine			LL		108
24 Feb 2013 16:47	18 Nov 2013 10:34	Electrolytes	Sodium	124	Final	Plasma			LL		135-145
15 Feb 2013 16:16	18 Nov 2013 10:33	Electrolytes	Sodium	124	Final	Plasma			LL		135-145
02 Feb 2013 18:34	18 Nov 2013 10:29	Electrolytes	Sodium	124	Final	Plasma			LL		135-145
02 Feb 2013 07:44	18 Nov 2013 10:34	Electrolytes	Sodium	124	Final	Plasma			LL		135-145

### Selection Filtering

## Checkbox Filtering

This method is employed on certain columns where the filtering options are fixed values.

1. Hover over the Filters menu and select the appropriate selection(s)
2. The filter is immediately applied to the column. Select anywhere outside of the menu to close it

The screenshot shows the 'Diagnostic imaging' portlet for patient SMITH, DAN. A dropdown menu is open over the 'Report Status' column, with 'Amended (A)' and 'Preliminary' selected. A red callout box points to the selected options with the text: 'Report Status column is filtered to only display reports with 'Amended' and 'Preliminary' status.'

Procedure Date/Time	Report	Image	Procedure Descr	Report Status	Organization	Accession Number
13 Jul 2017 15:25			INTRAVASCU-LLC	Amended (A)		ACC IM R2.P1.20171220
23 May 2017 15:51			INTRAVASCU-LLC	Amended (A)		ACC IM R2.P1.20171220
05 Apr 2017 02:17			DIGITAL RA-RAD	Preliminary		ACC IM R2.P1.20171220
16 Feb 2017 00:42			INTRAOCULA-SIG			ACC IM R2.P1.20171220

### Checkbox Filtering

## Remove Filters from Individual Columns

To remove a filter:

1. Display the Filters list the same way as previously and unselect the checkbox. The filter criteria are still displayed, but the filter is not applied if the Filters checkbox is not selected.

The screenshot shows the ClinicalViewer interface for patient SMITH, DAN. The main content is a table of diagnostic imaging results. A context menu is open over the table, showing options like 'Sort Ascending', 'Sort Descending', 'Columns', and 'Filters'. The 'Filters' option has a checkbox that is currently checked. A red box highlights this checkbox, and a text overlay reads: "Filters checkbox must be unchecked for filter to be removed".

Procedure Date/Time	Report	Image	Procedure Description	Additional Information	Report Status	Organization	Accession Number
23 Mar 2018 08:30			LASER SURF-RINGUI		Final		ACC UTF16.2018032
13 Jul 2017 15:25			INTRAVASCU-LLQ; IN	left lower quadra...	Amended (A)		ACC IM R2.P1.20171
23 May 2017 15:51			INTRAVASCU-LLQ; IN	left lower quadra...	Amended (A)		ACC IM R2.P1.20171
05 Apr 2017 02:17			DIGITAL RA-RADIUS	radius and ulna)	Preliminary		ACC IM R2.P1.20171
16 Feb 2017 00:42			INTRAOCULA-SIGMO		Preliminary		ACC IM R2.P1.20171
26 Dec 2016 23:08			RADIO FLUO-SCJOIN	Fluoroscopy, R...	Final	St Michaels Hospital	ACC IM R2.P1.20171
06 Nov 2016 17:34			RADIOGRAPH-INTRA	(Internal, Internal, Internal) radiographic ima...	Final	St Michaels Hospital	ACC IM R2.P1.20171
15 Sep 2016 17:00			HEMODYNAMI-CEREBHEMISPHEREL; HEMO...	(Left, Hemodynamic Waveform, Cerebral he...	Final	St Michaels Hospital	ACC IM R2.P1.20171

### Remove Filter

## Filtering Across the Entire Portlet

You can filter any portlet based on a particular term or terms. The filter term should be entered into the text field labelled "Enter filter text..." on the portlet header. Applying a filter in this manner displays all records within the portlet in which the filter term(s) appear in any visible column; hidden columns are disregarded. If multiple terms are used in the filter, separate them with a space. The results returned will include only those records containing ALL of the filter terms. The filter results will be applied in addition to any column-level filters that are applied.

Portlet is filtered on the string 'opiate'

Results set reduced from 262 to 45

#	Brand Name	Strength	Form	Quantity	Est. Days Supply	Pharmacy	Prescriber	Prescriber ID	Sub Classification Name
HCL	Co Dicyclone CR	20mcg & 100mcg	INJ SOL	16	7	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	20091	OPiate AGONISTS
HCL	Co Dicyclone CR	100mcg	INJ-10ML PK	18	9	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	20091	OPiate AGONISTS
HCL	Co Dicyclone CR	25mcg/hr	INSERT	34	25	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	20091	OPiate AGONISTS
HCL	Co Dicyclone CR	100U/mL	INJ PD-10MG PK	19	10	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	20091	OPiate AGONISTS
HCL	Co Dicyclone CR	0.625mg/g	INJ	23	14	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	20091	OPiate AGONISTS
HCL	Co Dicyclone CR	20mcg & 100mcg	INJ-10ML PK	13	4	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	20091	OPiate AGONISTS
HCL	Co Dicyclone CR	100U/mL	INJ PD-VIAL PK	26	17	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	20091	OPiate AGONISTS
HCL	Co Dicyclone CR	0.625mg/g	GRAN 2G PK	12	3	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	20091	OPiate AGONISTS
HCL	Co Dicyclone CR	100mcg	INJ SOL	15	6	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	20091	OPiate AGONISTS
HCL	Co Dicyclone CR	25mcg/hr	QIL	29	20	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	20091	OPiate AGONISTS
HCL	Co Dicyclone CR	0.8mg/mL & 1mg/mL	INJ PD-VIAL PK	31	22	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	20091	OPiate AGONISTS
HCL	Co Dicyclone CR	0.75mg	INJ	19	1	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	20091	OPiate AGONISTS
HCL	Co Dicyclone CR	500mg	INSERT	15	6	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	20091	OPiate AGONISTS
HCL	Co Dicyclone CR	500mg	GRAN 2G PK	22	13	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	20091	OPiate AGONISTS
HCL	Co Dicyclone CR	0.75mg	GRAN 2G PK	27	18	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	20091	OPiate AGONISTS
HCL	Co Dicyclone CR	0.8mg/mL & 1mg/mL	INJ PD-10MG PK	21	12	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	20091	OPiate AGONISTS

Dispensed Medications Portlet Filtered on the String "opiate"

## Removing Filters from Portlets

In order to clear portlet-level filtering, you will need to delete the filter terms entered into the text box on the portlet header. This removes portlet-level filtering, however any column-level filtering remains in effect.

Filter string removed


All results returned

Dispensed Date	Generic Name	Brand Name	Strength	Form	Quantity	Est. Days Supply	Pharmacy	Prescriber	Prescriber ID
08 Jun 2020	QUININE SULFATE	Novo-Quinine	0.625mg/g	GRAN 2G PK	10	1	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	20091
08 Jun 2020	OXYCODONE HCL	Co Oxycodone CR	20mcg & 100mcg	INJ SOL	16	7	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	20091
08 Jun 2020	OXYCODONE HCL	Co Oxycodone CR	100mcg	INJ-10ML PK	18	9	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	20091
08 Jun 2020	OXYCODONE HCL	Co Oxycodone CR	25mcg/hr	INSERT	34	25	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	20091
08 Jun 2020	QUININE SULFATE	Novo-Quinine	0.8mg/mL & 1mg/mL	INJ PD-VIAL PK	18	9	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	20091
08 Jun 2020	OXYCODONE HCL	Co Oxycodone CR	100U/mL	INJ PD-10MG PK	19	10	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	20091
08 Jun 2020	QUININE SULFATE	Novo-Quinine	0.625mg/g	INJ	17	8	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	20091
08 Jun 2020	QUININE SULFATE	Novo-Quinine	100U/mL	INJ PD-VIAL PK	15	6	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	20091
08 Jun 2020	QUININE SULFATE	Novo-Quinine	0.8mg/mL & 1mg/mL	INJ PD-10MG PK	30	21	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	20091
08 Jun 2020	QUININE SULFATE	Novo-Quinine	100U/mL	INJ PD-10MG PK	27	18	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	20091
08 Jun 2020	OXYCODONE HCL	Co Oxycodone CR	0.625mg/g	INJ	23	14	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	20091
08 Jun 2020	QUININE SULFATE	Novo-Quinine	100mcg	INJ SOL	16	7	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	20091
08 Jun 2020	OXYCODONE HCL	Co Oxycodone CR	20mcg & 100mcg	INJ-10ML PK	13	4	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	20091
08 Jun 2020	OXYCODONE HCL	Co Oxycodone CR	100U/mL	INJ PD-VIAL PK	26	17	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	20091
08 Jun 2020	QUININE SULFATE	Novo-Quinine	0.75mg	INJ	27	18	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	20091
08 Jun 2020	QUININE SULFATE	Novo-Quinine	100mcg	INJ-10ML PK	12	3	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	20091
08 Jun 2020	QUININE SULFATE	Novo-Quinine	0.625mg/g	INJ	23	14	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	20091

Document/Notes Portlet with the Filtering Removed

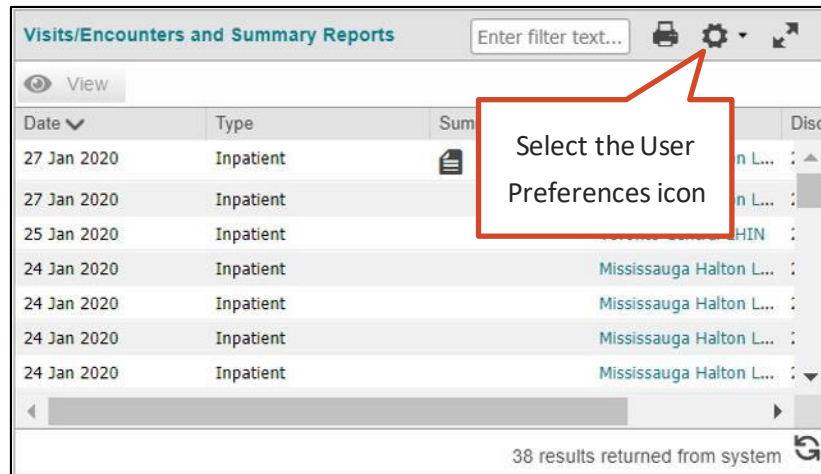
## User Preferences

The ClinicalViewer displays patient lists (My Workspace tab), the timeline and patient information (Patient Care tab) according to system-wide defaults. You can modify most of these defaults by selecting the User Preferences

icon  available on the timeline, the patient lists, and on each portlet. When settings are changed with this option, they are saved for future logins.

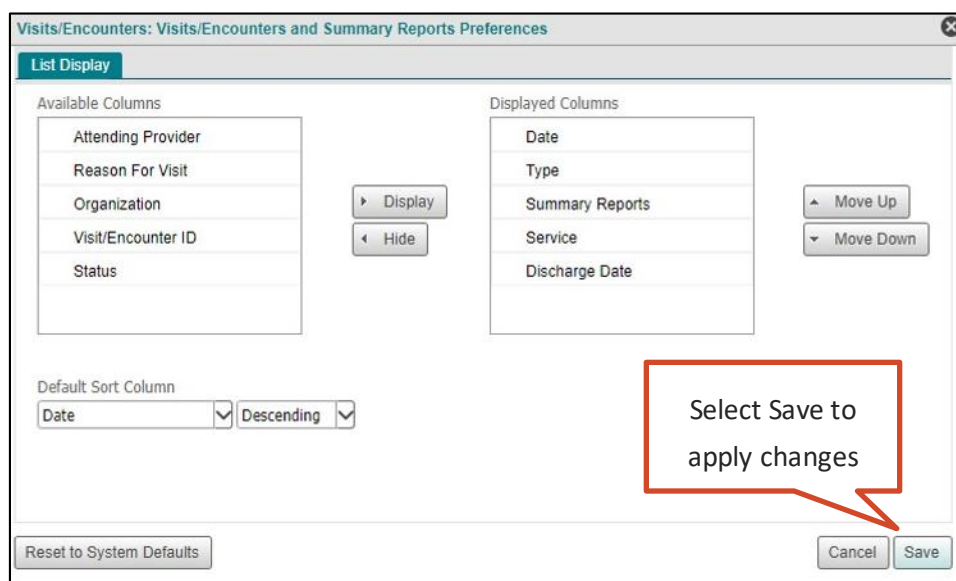
To configure the lists, timeline or portlets, follow the instructions below:

1. Select the 'User Preferences' icon  in the top right corner of the list, timeline, or portlet title bar



### User Preferences Icon

2. Select "List Display Settings" for lists and portlets or "General Settings" for the timeline. This will open the 'Preferences' dialog box. To apply changes, select Save. The affected view will automatically refresh to reflect the selected settings.



### Configure Grid Dialog, Visits/Encounters Condensed View

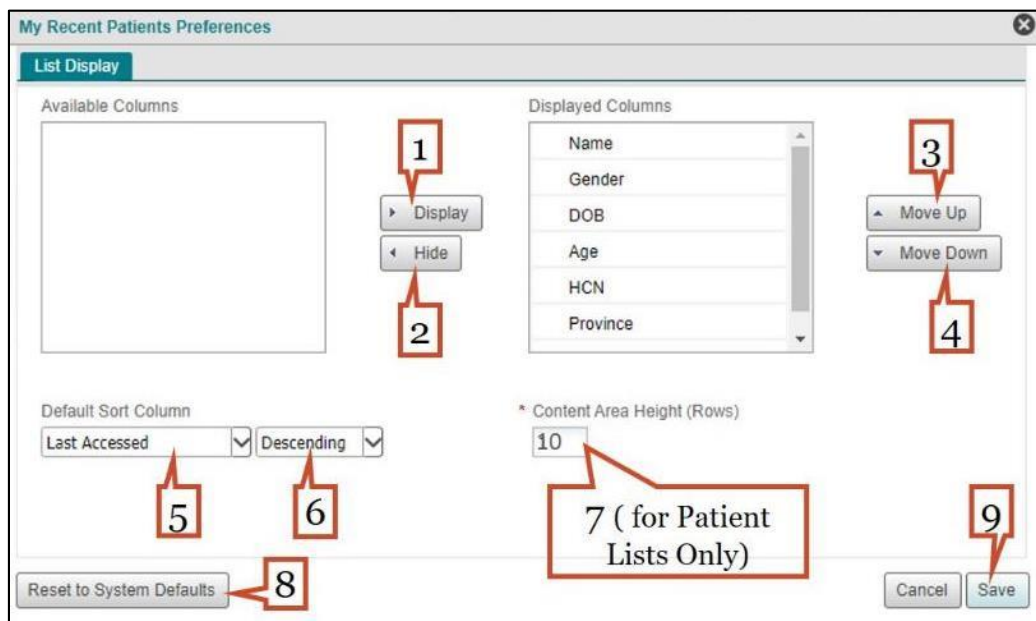
## List and Portlet Settings

User preferences are available in all portlets, on both the summary views and the individual portlet views. These preferences are unique to each portlet (including each tab within a portlet), as they are all independent from each other.

Any changes made to any portlet in the Summary View are made only to that portlet as it is displayed in the Summary View. For example, changing the configuration of the Documents/Notes portlet in the Summary View does not affect the configuration of the Documents/Notes portlet in either the Summary List View or the individual portlet view, nor any instances of the Documents/Notes portlets included in a [custom view](#).

User preferences available are:

- Hide or display columns
- Change the order of the displayed columns
- Change the default sort column and the sort order
- Reset the preferences to the system defaults



Portlet User Preferences

### Display or Hide Columns

1. Select a column in the “Available Columns” list and select Display to add it to the portlet.
2. Select a column in the “Displayed Columns” list and select Hide to suppress it from the portlet

*Note:* Columns with a lock icon  beside them cannot be removed from the list.



## Change the Order of the Displayed Columns

3. Select a column in the Displayed Columns list and select “Move Up” to move it further left in the portlet
4. Select a column in the Displayed Columns list and select “Move Down” to move it further right in the portlet

## Change the Default Sort Column and the Sort Order

5. Select a column from the Default Sort Column drop-down list to change the column that is used by default to sort the information in the portlet
6. Specify the default sort order (Ascending or Descending)

## Content Area Height (Rows) (Patient Lists Only)

7. Enter the number of rows you would like to have displayed per page in the list

## Reset the Preferences to the System Defaults

8. Select Reset Preferences in the bottom left corner of the Preferences dialog to return all preferences to the default configuration


## Save Changes

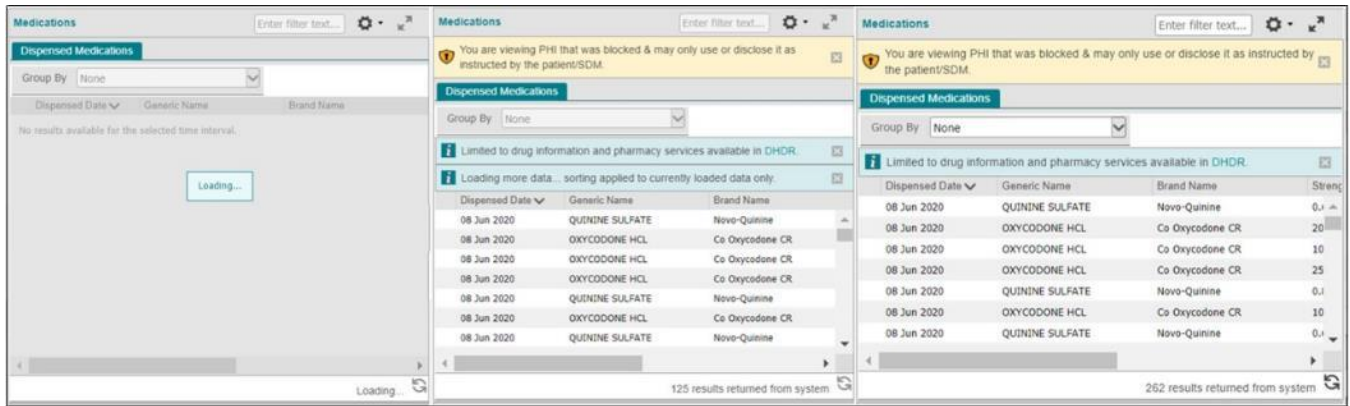
9. Select Save to save the preferences specified. Upon next log in, these preferences will be used

## Data Availability Indicators

A status indicator displays to indicate how many records have been returned. If there are errors in retrieving the data, an error message will indicate the issue.

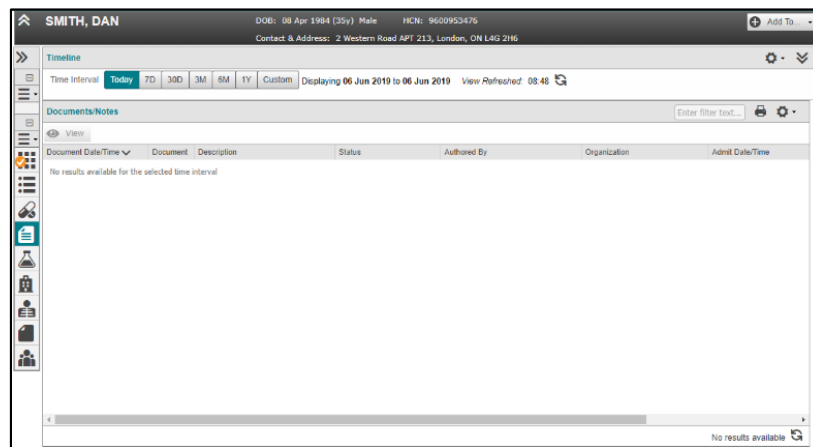
## Data Loading

While a query is in progress, if there is a large volume of information to be returned, the information appears in the ClinicalViewer in batches. Prior to any data load, a grey screen displays with the message “Loading...”. As the information loads and while the full amount is still pending, the loading  icon displays at the bottom of the list view with a partial record count. A teal notification bar appears to indicate that more information is pending. As soon as any data is displayed in the ClinicalViewer, you can begin working (e.g., scrolling, filtering, sorting, changing tabs, opening the details screen, etc.).



**Data Load in Progress. Before any Data is Returned (Left), Interim Load (Center), Load Complete (Right)**

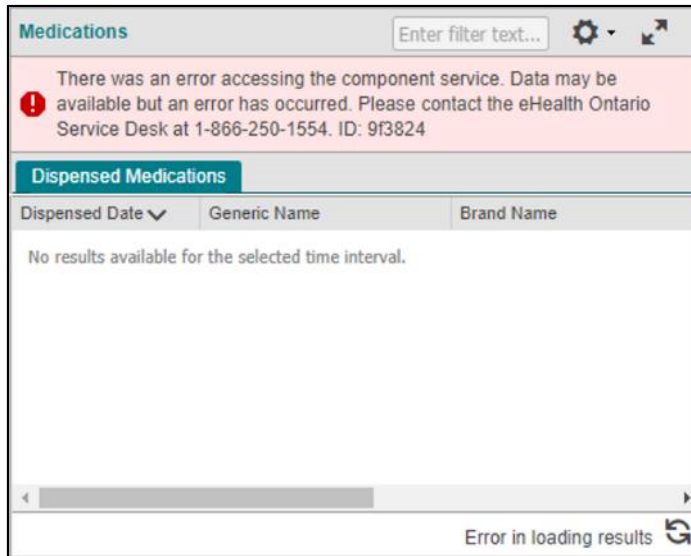
If the query has successfully completed, but no information has been returned, 'No results available for the selected time interval' is displayed directly in the portlet.



**No Results Available**

If errors are encountered while loading patient information, a pink banner containing an alert message appears at the top of the portlet. A “transaction ID” is appended to the end of the error message – this may be required if the issue is reported to the service desk.

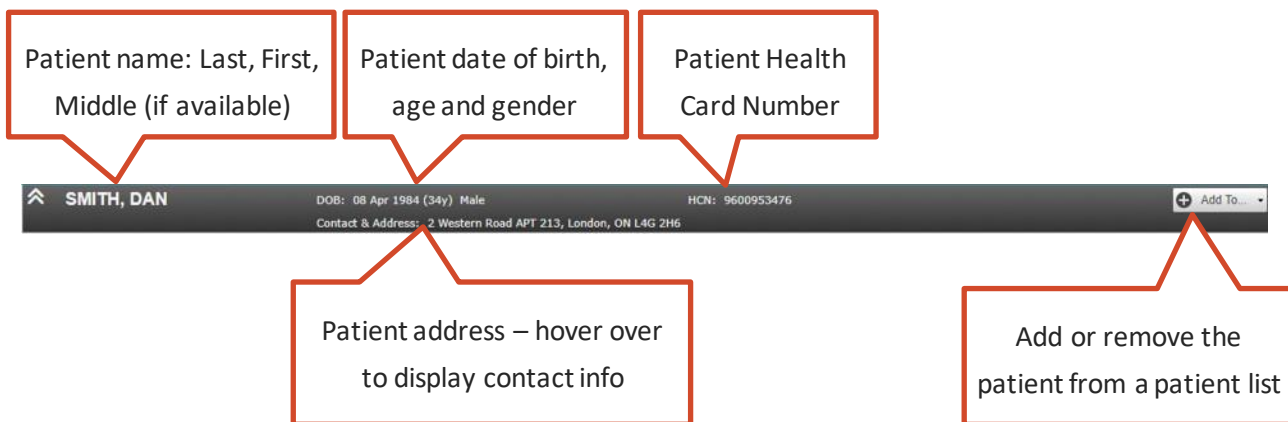
*Note:* You cannot close an alert message.



**Portlet Error Message**

## Patient Banner

The patient banner identifies the currently displayed patient and appears at the top of every page containing patient-specific information (i.e., not available on the My Workspace tab). The patient banner displays patient demographic and contact information. The patient banner displays in either a concise collapsed view in which case the contact information is hidden or a more detailed expanded view (shown below).



**Patient Banner Overview**

You can perform the following actions on the patient banner:

1. To add/remove the patient to/from My Patients List, see [Add/Remove Patient](#). The “Add To” and “Remove From” buttons are context sensitive and are enabled appropriately depending on whether the selected patient is in My Patients list.
2. Hover the mouse pointer over the patient’s address to view their full contact information in a tooltip



**Patient Address and Contact Information**

## Add/Remove Patient

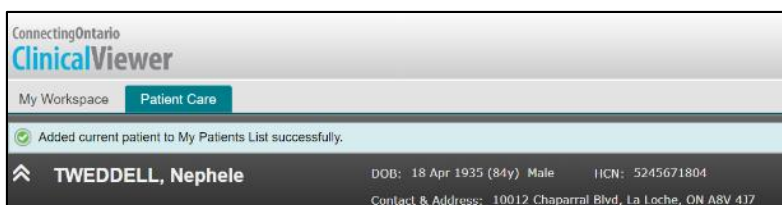
To add or remove the current patient to or from My Patients List:

1. Select the  or the  button
2. Check or uncheck the My Patients List checkbox
3. Select Done



**Add/Remove Patient Screen**

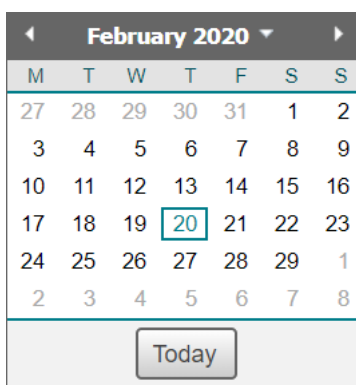
The ClinicalViewer adds or removes the patient, closes the patient list tooltip, and displays a confirmation message.



### Patient Added Confirmation Message

## Calendar

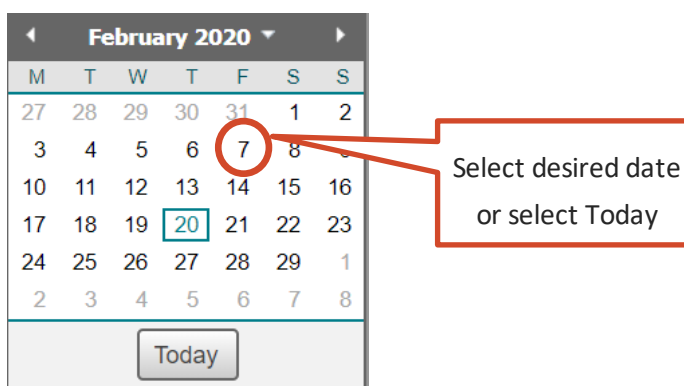
Where entry of a date is required in the ClinicalViewer, two methods are available: type the date directly into a date field or use the calendar widget (if available for the field).



### Calendar Widget

A. Select a date within the current month:

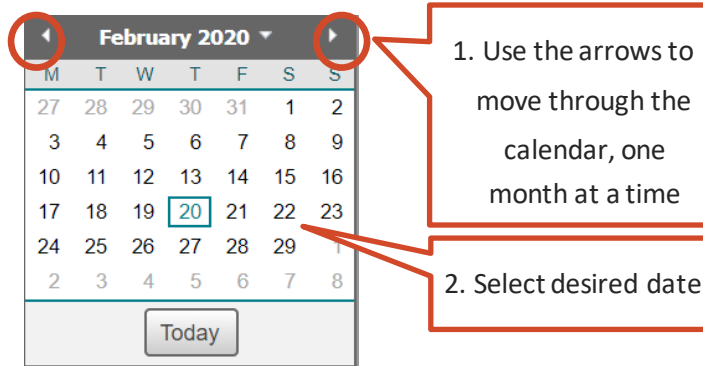
1. Select the desired date directly on the displayed calendar or select the Today button. The calendar closes and puts the selected date in the date field.



### Calendar, Select Date

B. Select a date in a different month:

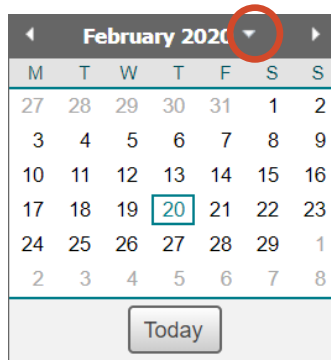
1. Select the previous or next arrow to step through the calendar, one month at a time
2. Select the desired date. The calendar closes and puts the selected date in the date field.



**Calendar, Select Month**

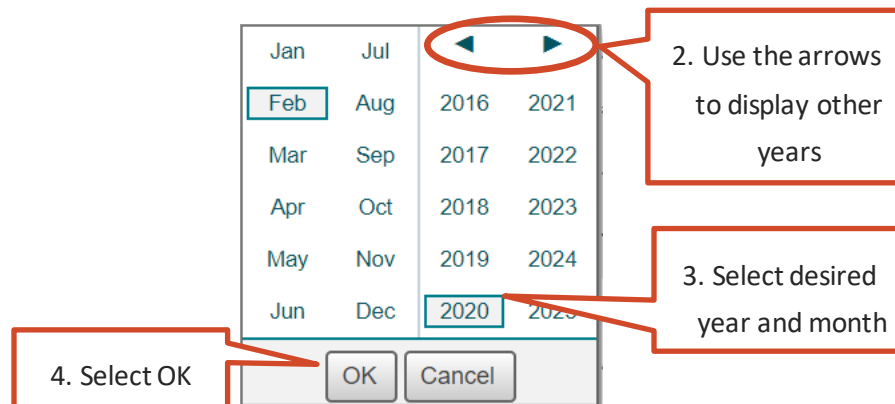
C. Select a date in a different month and/or year:

1. Select the drop-down to open the month/year selector



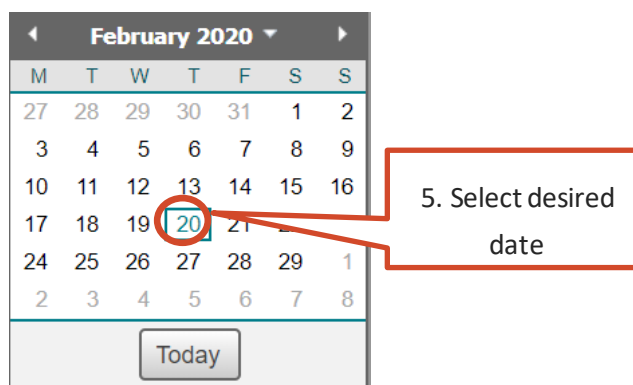
**Calendar, Select Drop-Down**

2. Use the previous or next arrow to show other years, if needed
3. Select the month and year
4. Select OK



**Calendar, Select Month/Year**


5. From the calendar showing the selected month and year, Select the desired date. The calendar closes and puts the selected date in the date field.

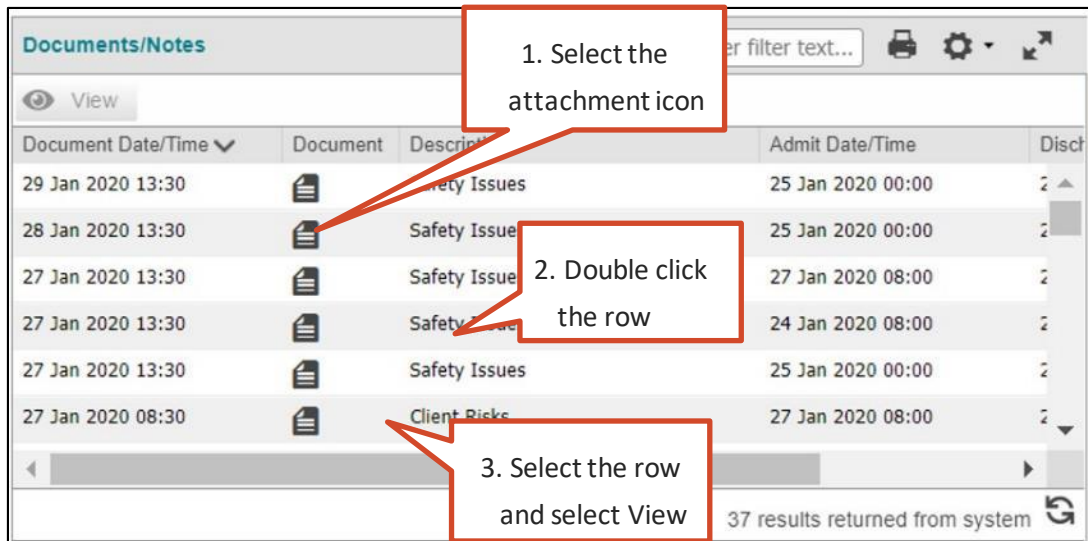


**Calendar, Select Date**

## Viewing Documents

The Document Viewer is a separate window that opens when you select a document for viewing from any portlet. Because each portlet contains different types of data, the Document Viewer is slightly different for each portlet. You can access the Document Viewer in three ways, but not every portlet supports all three methods:

1. Select the attachment  icon
2. Double Select the row
3. Select the desired row and select View



### Opening the Document Viewer

The Document Viewer window opens to display the attachments. If there are multiple document attachments, each displays in its own tab. The following information displays:

- Patient name, date of birth (DOB), gender, and health card number (HCN)
- Summary information (varies based on the portlet the attachment is opened from)
- Attachment (document) content
- Privacy disclaimer



The screenshot shows a web browser window titled "View Lab and Pathology Results - Google Chrome". The address bar shows a URL: "devrhn7.dev.emergis/ProviderPortal/viewer/index.jsp". The page content includes patient information, test results, and a detailed report from the Ontario Laboratories Information System (OLIS).

Callouts point to the following elements:

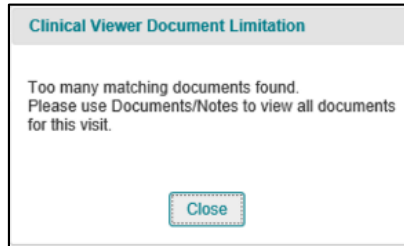
- Patient Name, DOB, Age, Gender and HCN:** Points to the header area showing "SMITH, DAN", "DOB: 08 Apr 1984 (35y) Male", and "HCN: 9600953476".
- Summary Information:** Points to the "OLIS Full Report" tab.
- Attachment content:** Points to the "PATIENT" section of the report.
- Privacy Disclaimer:** Points to the footer area containing a disclaimer and user information.
- Select X to close the Document Viewer (Option 1):** Points to the close button (X) in the browser window's title bar.
- Select Close to close the Document Viewer (Option 2):** Points to the "Close" button at the bottom right of the document viewer.

### Document Viewer Framework

You can print attachments from the Document Viewer, one tab at a time. See [Printing from Document Viewer](#).

You can launch multiple instances of the Document Viewer; each can be minimized, maximized or re-sized. All of the ClinicalViewer functionality remains available when a Document Viewer is open except when printing is taking place. If this is the case, the print job must be finalized or cancelled to access the ClinicalViewer. The Document Viewer automatically closes when a new patient is put into context, you log out, or launch a second instance of the ClinicalViewer.

If the number of documents associated to a single visit or referral exceeds the maximum that can be displayed (20), a message displays.



**Too Many Documents Message**

## Document Size

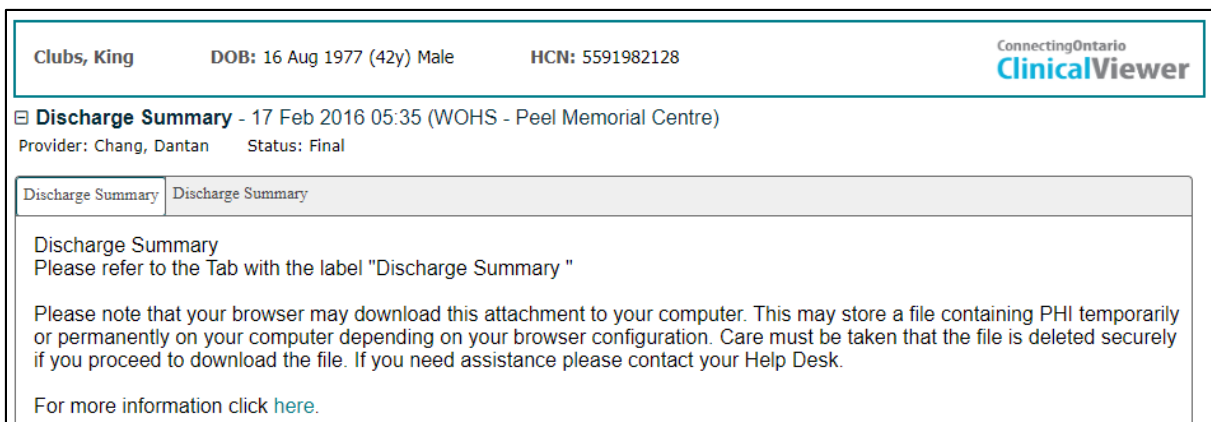
The largest file that can be sent to ConnectingOntario is 7MB. Files larger than 7MB are divided into smaller files by organizations prior to sending. In this case, each of the smaller files displays as a separate row in the portlet. Organizations may name the files Part 1 and Part 2 to indicate the relationship of the files; however, this may not always be the case.

## Document Types

The following report types can be sent to ConnectingOntario: GIF, HTML, JPG, PDF, RTF, TIFF, and XML.

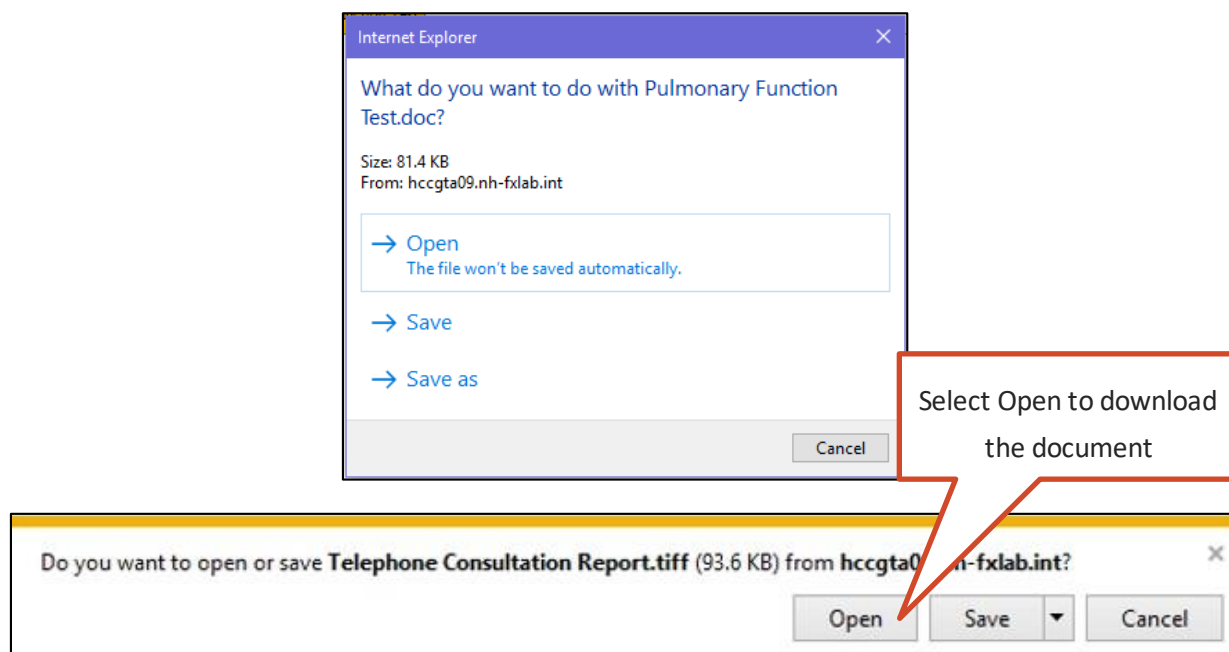
RTF files must be downloaded by local applications in order to be viewed. Depending on the plugins available on the user's workstation, TIFF and PDF documents may also have to be downloaded by local applications to be viewed.

1. You are presented with two tabs – the first tab provides instructions for viewing the document:



**Document Viewer: Viewing Instructions**

2. Follow the instructions displayed within the Document Viewer to download the document. In the example below, Select the second tab to launch the File Download dialog.
3. Select Open  
The document is downloaded using standard browser functionality.



### File Download Dialog

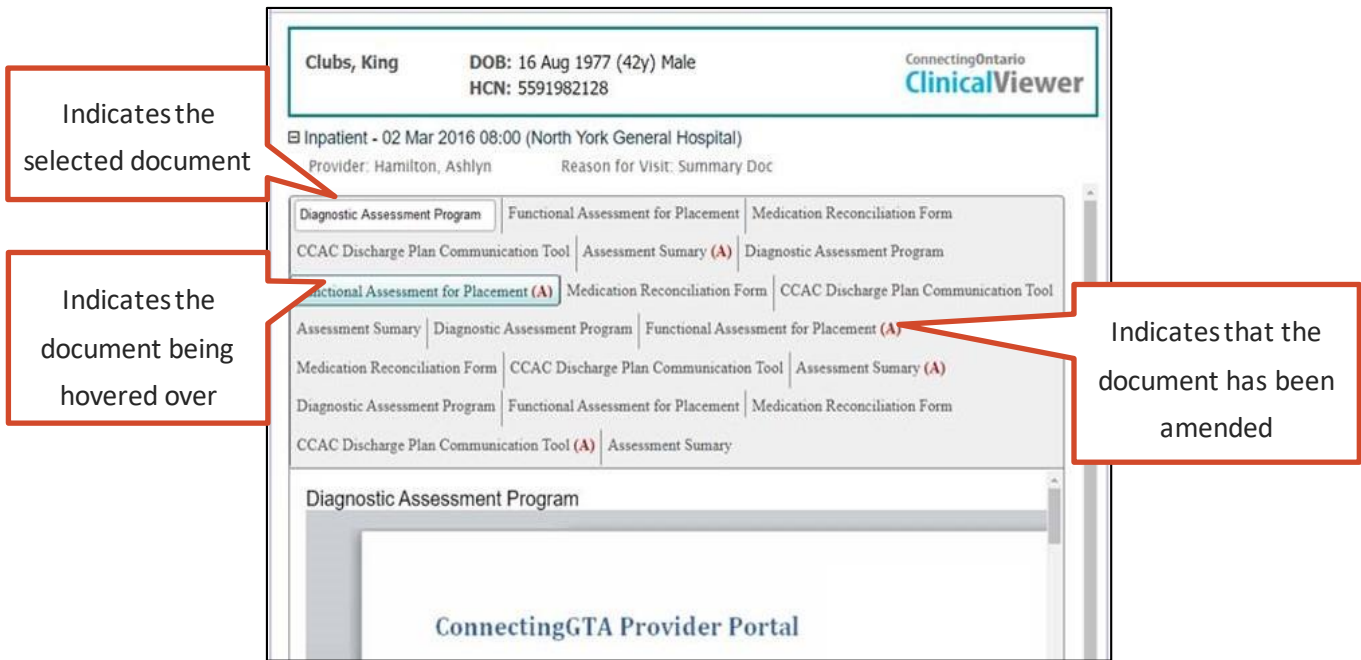
You can view other files types directly in the Document Viewer, as long as the required add-ons have been configured.

In cases where a document must be downloaded locally, a privacy disclaimer is displayed on the initial tab as follows:

*Please note that your browser may download this attachment to your computer. This may store a file containing PHI temporarily or permanently on your computer, depending on your browser configuration. Care must be taken that the file is deleted securely if you proceed to download the file. If you need assistance, please contact your Help Desk.*

## Amended Documents

When a document has been amended, an indicator in the form of an **(A)** appears on the document tab label.



### Amended Document Indicator

## Printing

The following table provides a summary of what you can print in the ClinicalViewer from the My Workspace tab.

List	Print
My Patients	✓
My Recent Patients	✓

### Printing from My Workspace Tab

The following table provides a summary of what can be printed from the Patient Care tab.

#### Available Views

Portlet	Summary (3 Col)	Summary List (1 Col)	Individual Portlet	Document Viewer
Medications	✗	✓	✓	✗
Visits/Encounters and Summary Reports	✓	✓	✓	✓
Documents/Notes	✓	✓	✓	✓
Diagnostic Imaging	✓	✓	✓	✓
Other Results	✓	✓	✓	✓
Lab and Pathology Results	✗	✗	✗	✓
Community	✓	✓	✓	✓

#### Printing from Patient Care Tab

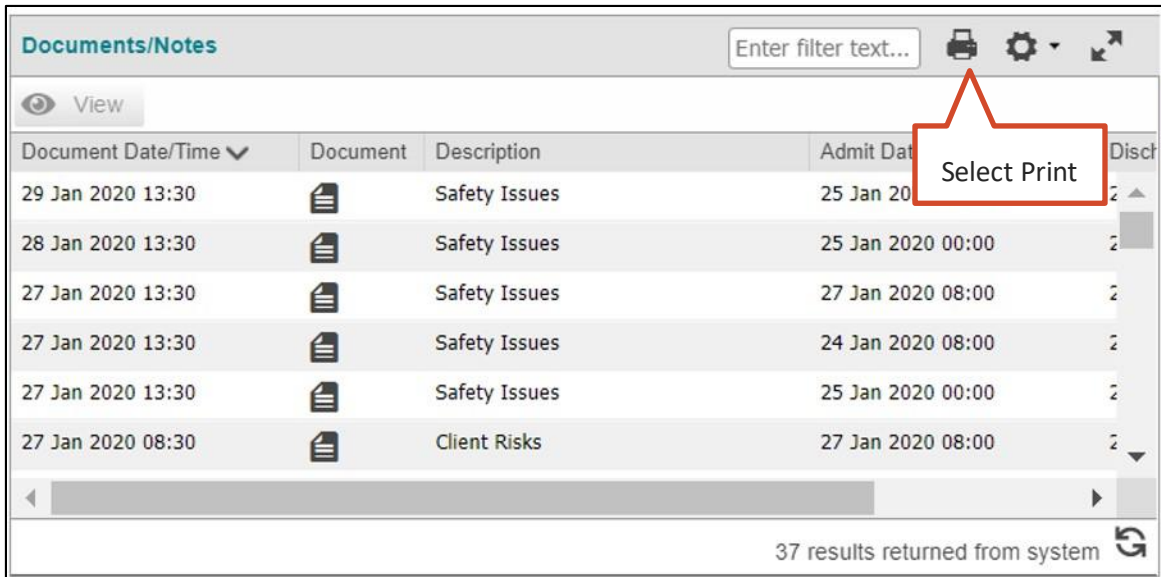
### Printing from List Views

You can print the contents of a portlet for any of the following:

- My Patients List and My Recent Patients List
- Any portlet from the Summary View (Except Medications; Lab and Pathology Results)
- Any portlet from the Summary List View (Except Lab and Pathology Results)
- Any portlet from the individual portlet view (Except Lab and Pathology Results)

To print the contents of a portlet:

1. In portlets where it is available, Select the Print  icon in the upper right corner of the portlet



### Print Icon

2. A print preview of the portlet table view displays and the standard print dialog for the internet browser also displays. This dialog varies depending on which internet browser is in use.

The ConnectingOntario header and footer are applied to all views when printed. The alternating colours of the rows (grey and white) will display in your print-out if the appropriate setting is enabled in your browser. For example, in Chrome you must enable “Background graphics” under “More settings” on the print dialog.

Print header includes:

- Portlet name
- Patient name
- Patient DOB
- Patient age
- Patient HCN

8/21/2020 Visits/Encounters and Summary Reports SMITH, DAN DOB: 08 Apr 1984 (36y) Male HCN: 9600953476

Visits/Encounters and Summary Reports  
SMITH, DAN DOB: 08 Apr 1984 (36y) Male HCN: 9600953476

ConnectingOntario  
**ClinicalViewer**

Date	Type	Summary Reports	Organization	Discharge Date
20 Jun 2019	Inpatient		<a href="#">THP - Mississauga Hospital</a>	
15 Sep 2013	ED		<a href="#">North York General Hospital</a>	
03 Aug 2012	Inpatient		<a href="#">THP - Mississauga Hospital</a>	
03 Aug 2012	Inpatient		<a href="#">THP - Mississauga Hospital</a>	

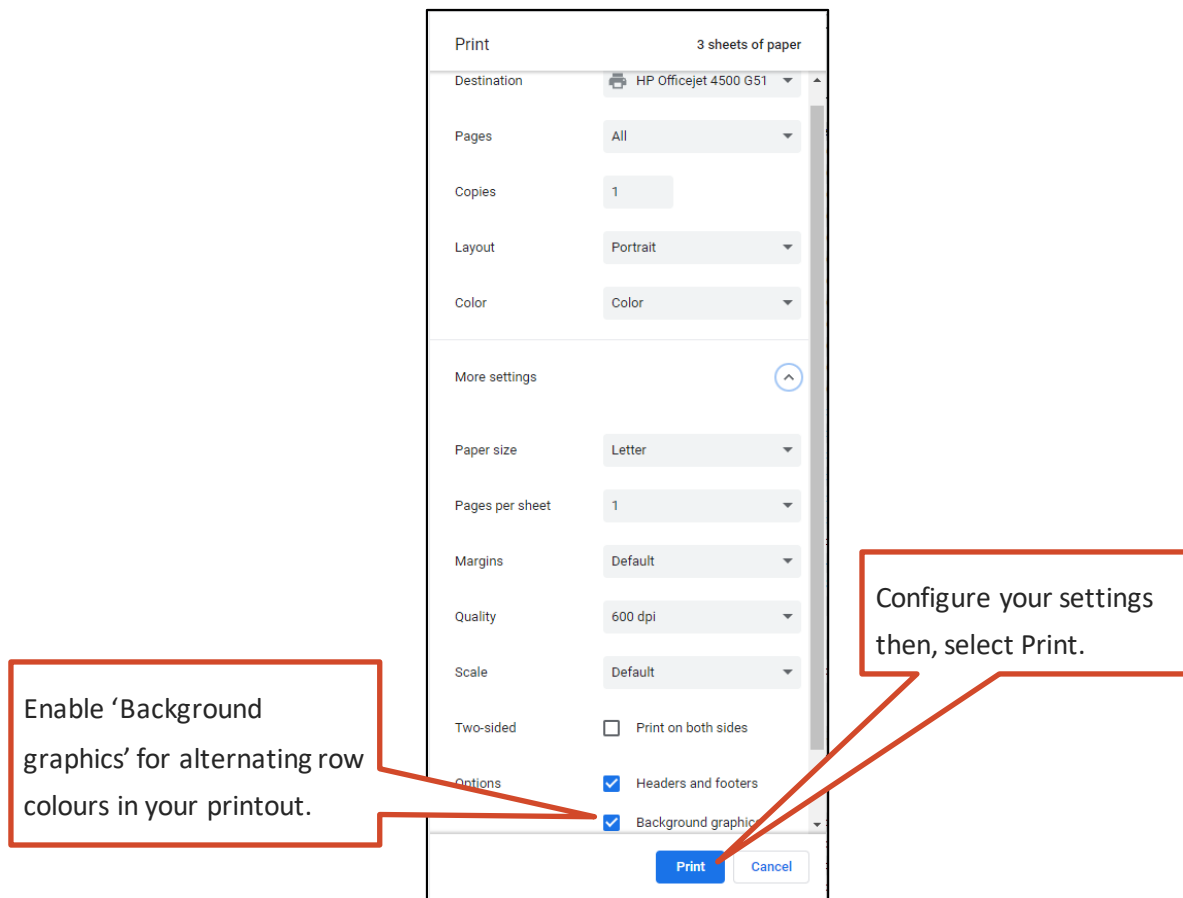
**Privacy Disclaimer:**  
This information is confidential and may only be used by the patient or individual listed in the footer. If you return to the organization listed in the footer. Shred when no longer needed.  
Generated from ConnectingOntario

User ID: Jeff.Reynolds      Organization: Sunnybrook Health Sciences Centre      Date:

Print footer includes:

- Privacy disclaimer
- Print source (ConnectingOntario)
- User's ID
- User's organization

### Print Header and Footer



**Print Dialog (Chrome)**

All data displayed in the view is included in print preview:

- Any filters, sorting or other data-limiting component features apply to the print function; only those selected data/columns/sort options in the view (including multiple pages if warranted) are printed in a formatted document
- If printing from Summary View, only the columns displayed in the view will print, i.e. hidden columns will not print
- If filters or sort options are not selected, all associated information for the view is printed
- The entire contents of the portlet prints for the selected time interval; not only what is visible on screen

## Printing from the Document Viewer

You can print most attachments (e.g. reports) directly from the Document Viewer. The presence of the Print Current Tab button in the lower right hand corner indicates that printing is available.

- Select Print Current Tab to print the attachment displayed in the current tab

The ConnectingOntario header and footer are applied when possible, given the original format of the selected document, to every page of the document

*Note:* To have the header appear at the top of every printed page, you must select the **Headers and Footers** check box, if Chrome is used.

The screenshot shows a web browser window displaying a document in the ClinicalViewer interface. The header at the top includes patient information: "Clubs, King", "DOB: 16 Aug 1977 (42y) Male", and "HCN: 5591982128". The document title is "Psychological Screening CHAD - 09 Jan 2016 02:00 (WOHS - Etobicoke General Hospital)". The provider is "Chang, Dantan" and the status is "Amended (A)". The main content area shows a "Psychological Screening CHAD" document with a large greyed-out area and the text "ConnectingGTA Provider Portal". The footer contains a privacy disclaimer, generation information ("Generated from ConnectingOntario"), user ID ("User Id: Jeff.Reynolds"), organization ("Organization: Sunnybrook Health Sciences Centre"), and date ("Date: 19 Jan 2020 14:58"). At the bottom right, there are two buttons: "Print Current Tab" and "Close".

**Print header includes:**

- Patient name
- Patient DOB
- Patient age
- Patient HCN

**Print footer includes:**

- Privacy disclaimer
- Print source (ConnectingOntario)
- User's ID name
- User's organization

**Select Print Current Tab**

### Document Viewer Print Button

2. The standard print dialog for the internet browser opens. This dialog varies depending on the internet browser in use

## Print Format

- Images are resized to fit within the width of the page
- Standard format is 8 ½ by 11
- Print can be landscape or portrait to fit the document contents



# Find and Select Patients

## My Workspace Tab

The My Workspace tab contains patient lists that enable quick and easy selection of a patient. When logging into the ClinicalViewer without a patient pre-selected from the user's local HIS, this page displays by default.

The My Workspace page contains two components:

1. My Patients List
2. My Recent Patients

The screenshot displays the ClinicalViewer interface. At the top, it says "ConnectingOntario ClinicalViewer" and "Welcome: Jeff Reynolds (Sunnybrook Health Sciences Centre)". There is a search bar and a "Logout" button. The main content area is titled "My Workspace" and "Patient Care". It features two sections: "My Patients List" and "My Recent Patients".

**My Patients List**

Name	Gender	DOB	Age	HCN	Province	Date Added	Remove
BUSBY, Riona	Female	09 Jan 1933	87y	4098174628	Ontario	31 May 2019	
Clubs, King	Male	16 Aug 1977	42y	5591982128	Ontario	06 Aug 2020	
SMITH, DAN	Male	08 Apr 1984	36y	9600953476	Ontario	27 May 2019	
TWEDDELL, Nephel	Male	18 Apr 1935	85y	5245671804	Ontario	28 May 2018	

Navigation: Page 1 of 1. Displaying 1 - 4 of 4.

**My Recent Patients**

Name	Gender	DOB	Age	HCN	Province	Last Accessed
SMITH, DAN	Male	08 Apr 1984	36y	9600953476	Ontario	10 Aug 2020 10:56
MALIK, LEMON	Male	31 May 1930	90y	5331755974	Ontario	06 Aug 2020 16:20
TWEDDELL, Nephel	Male	18 Apr 1935	85y	5245671804	Ontario	06 Aug 2020 16:18
Clubs, King	Male	16 Aug 1977	42y	5591982128	Ontario	06 Aug 2020 16:16
BUSBY, Riona	Female	09 Jan 1933	87y	4098174628	Ontario	06 Aug 2020 13:44

Navigation: Page 1 of 1. Displaying 1 - 5 of 5.

Footer: Terms of Use | Privacy. Copyright © 2005-2020 Allscripts Healthcare Solutions, Inc. - Integrated Patient Record 19.2.0. Ontario Health logo.

### My Workspace Overview

## My Patients List

You can add patients to the My Patients List, which appears on the My Workspace tab. The My Patients List is a convenient way to find a patient record quickly and easily.

The list contains the following patient information: name, gender, date of birth, age, health card number, province, and date added. By default, the list is sorted in ascending order by **Name**.



Name ^	Gender	DOB	Age	HCN	Province	Date Added	Remove
BUSBY, Riona	Female	09 Jan 1933	87y	4098174628	Ontario	31 May 2019	
Clubs, King	Male	16 Aug 1977	42y	5591982128	Ontario	06 Aug 2020	
SMITH, DAN	Male	08 Apr 1984	36y	9600953476	Ontario	27 May 2019	
TWEDDELL, Nephelē	Male	18 Apr 1935	85y	5245671804	Ontario	28 May 2018	

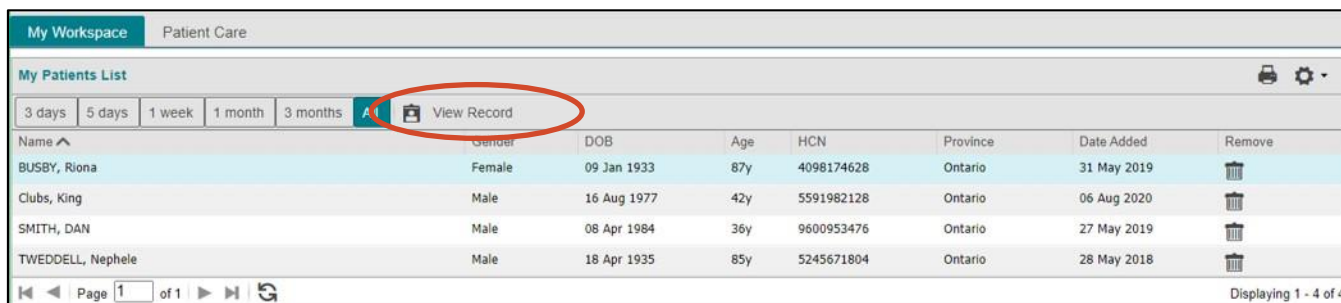
### My Patients List

## Putting a Patient into Context

To view the patient’s information, the patient must be put into context. This can be done in two ways:

1. Double click the patient row
2. Select the patient row, then select View Record

*Note:* The View Record button is not enabled until a patient’s row is selected.



### View Button, My Patients List

After selecting the patient row or View Record, the ClinicalViewer does the following:


1. Opens the Summary View page on the Patient Care tab (unless a different view has been set as the default)
2. Displays the patient demographics in the patient banner
3. Displays the patient information in the portlets if any are available for the current time interval

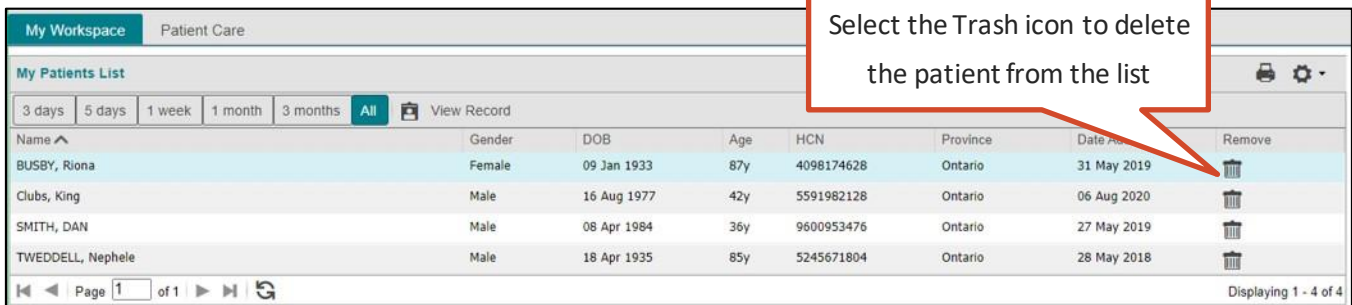
## Add Patients

To add a patient to the list, select  on the patient banner.

## Remove Patients

Patients remain on the list until removed.

1. With a patient row highlighted, select the Trash  icon on the corresponding patient row to delete the patient from the list



Select the Trash icon to delete the patient from the list

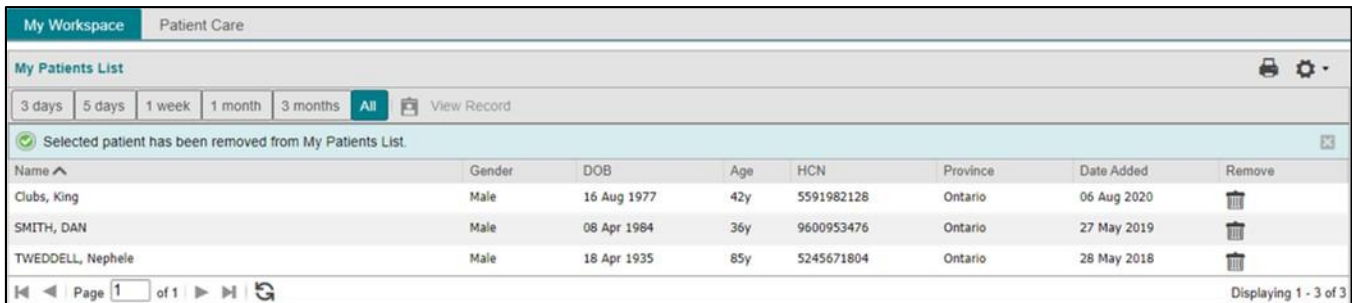
Name	Gender	DOB	Age	HCN	Province	Date Added	Remove
BUSBY, Riona	Female	09 Jan 1933	87y	4098174628	Ontario	31 May 2019	
Clubs, King	Male	16 Aug 1977	42y	5591982128	Ontario	06 Aug 2020	
SMITH, DAN	Male	08 Apr 1984	36y	9600953476	Ontario	27 May 2019	
TWEDDELL, Nephela	Male	18 Apr 1935	85y	5245671804	Ontario	28 May 2018	

### Trash Icon

2. Select Continue. The patient is removed from the list and a confirmation message displays

**Remove Patient**

Continue to remove the selected patient from the My Patients List?



Selected patient has been removed from My Patients List.

Name	Gender	DOB	Age	HCN	Province	Date Added	Remove
Clubs, King	Male	16 Aug 1977	42y	5591982128	Ontario	06 Aug 2020	
SMITH, DAN	Male	08 Apr 1984	36y	9600953476	Ontario	27 May 2019	
TWEDDELL, Nephela	Male	18 Apr 1935	85y	5245671804	Ontario	28 May 2018	

### Remove Patient from List Confirmation

You can also remove patients from a list using  on the patient banner.

**Reminder:** Remove patients from the My Patients List when you are no longer part of the patient's circle of care.

## Preferences

By default, the My Patients List shows all available columns. You can make temporary or permanent changes to the preferences for the My Patients List.

A. Temporary changes: adjust the preferences directly on the list

- Adjust the width of any column ([Column Width](#))
- Hide any of the following columns from the display: Name, Gender, DOB, Age, HCN, Province, and Date Added ([Hide or Show Columns](#))
- Sort the list by any column in ascending or descending order ([Sorting](#))
- Filter the list by any column ([Applying Filters to Individual Columns](#))

*Note:* Preferences configured directly on the list are not saved after navigating away from the My Patients List.

B. Permanent changes: personalize the list by selecting User Preferences

- Change which columns are displayed ([Hide or Show Columns](#))
- Change the order the columns are in ([Change the Order of the Displayed Columns](#))
- Select which column should be used for the default sort ([Change the Default Sort Column and the Sort Order](#))
- Change the number of rows displayed ([Change the Content Area Height](#) (Rows))
- Reset to system defaults ([Reset the Preferences to the System Defaults](#))

## My Recent Patients

The My Recent Patients list is a convenient way to find patient records that you have recently viewed. The list is automatically created by the ClinicalViewer based on recently viewed patients.

*Notes:*

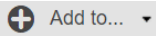
- A patient is added to the list as soon as the patient is put into context (i.e., as soon as the patient's data is viewed on the Patient Care tab)
- Patients accessed within the last year are visible on this list

Name	Gender	DOB	Age	HCN	Province	Last Accessed
SMITH, DAN	Male	08 Apr 1984	36y	9600953476	Ontario	10 Aug 2020 10:56
MALIK, LEMON	Male	31 May 1930	90y	5331755974	Ontario	06 Aug 2020 16:20
TWEDDELL, Nephela	Male	18 Apr 1935	85y	5245671804	Ontario	06 Aug 2020 16:18
Clubs, King	Male	16 Aug 1977	42y	5591982128	Ontario	06 Aug 2020 16:16
BUSBY, Riona	Female	09 Jan 1933	87y	4098174628	Ontario	06 Aug 2020 13:44

### My Recent Patients List

*Notes:*

- Last Accessed is the date when the logged in user last accessed the patient's record

- Add a patient to the My Patients List using  (same functionality as is available on the patient banner)
- By default, the list is sorted by Last Accessed

## Time Span

By default, the list shows patients viewed in the last month (30 days). To display the list of patients viewed during a different time span, select one of the other available periods from the menu bar: 3 days, 5 days, 1 week, 3 months (90 days), or 1 year (365 days).



Name	Gender	DOB	Age	HCN	Province	Last Accessed
SMITH, DAN	Male	08 Apr 1984	36y	9600953476	Ontario	10 Aug 2020 10:56
MALIK, LEMON	Male	31 May 1930	90y	5331755974	Ontario	06 Aug 2020 16:20
TWEDDELL, Nephela	Male	18 Apr 1935	85y	5245671804	Ontario	06 Aug 2020 16:18
Clubs, King	Male	16 Aug 1977	42y	5591982128	Ontario	06 Aug 2020 16:16
BUSBY, Riona	Female	09 Jan 1933	87y	4098174628	Ontario	06 Aug 2020 13:44

**My Recent Patients List Time Span Selection**

## Find a Patient

*Note:* the ability to search for a patient is controlled by your organization. If you are logged in from an organization that has chosen to block patient search, you will not be able to access the functionality in this section.

To find a patient in the ClinicalViewer:

1. Select 'Search for a patient' in the header at the top of the ClinicalViewer window



**Search for a Patient Button**

2. The **Search for a Patient** window opens. There are three search options:
  - A. [Search by HCN \(default\)](#)
  - B. [Search by MRN/CHRISClient #](#)
  - C. [Advanced Search](#)

### Search for a Patient Window

*Note:* If you navigate to the Patient Care tab without a patient in context, you will also be presented with this same **Search for a Patient** window.

3. Within this window, enter the required search criteria using one of the three search options.

If required fields are left empty, the text box will have a red border and label. An error message will display below.

### Error Messages

4. Select Search. The ClinicalViewer displays the Patient Search Results table listing matched patients ([Select a Patient](#)).

## Search by HCN

Search for a patient using the patient’s Health Card Number by entering the following:

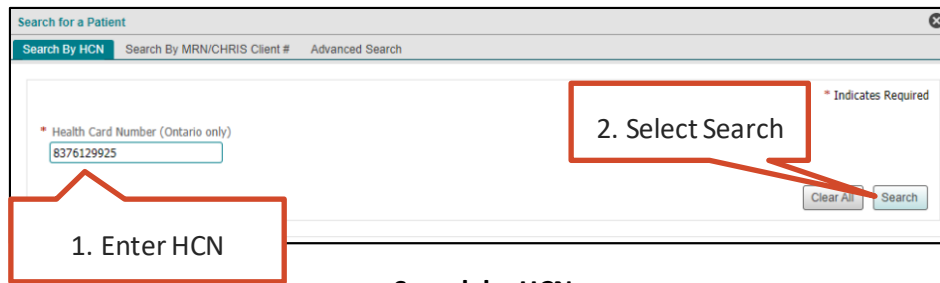
1. Health Card Number\* (Ontario only)

e.g., “123456789”

\* do not include the version code

2. Select Search

*Note:* This search can only be performed with Ontario Health Card Numbers. To search for a patient without an Ontario Health Card Number use either the Search by MRN/CHRIS Client # or Advanced Search options.

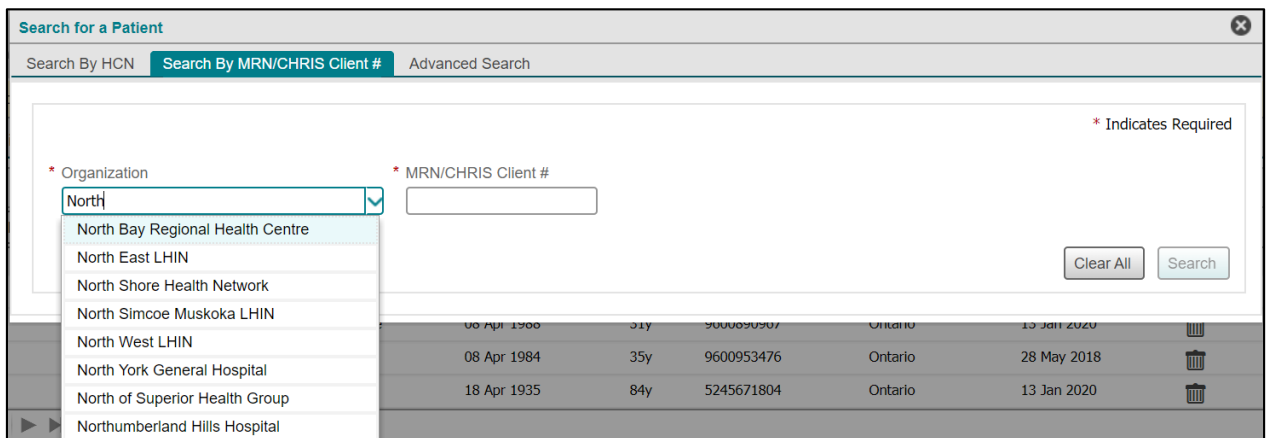


**Search by HCN**

## Search by MRN/CHRIS Client #

Search for a patient using the patient’s Medical Record Number (MRN) or CHRIS Client Number (CHRIS refers to LHIN Home and Community Care Services’ information system) by entering:

1. Organization
  - Select the organization that is associated with the ID number to be used in the search using the drop-down. You can also type in the Organization field, in which case you will be presented with matching organizations as you type.

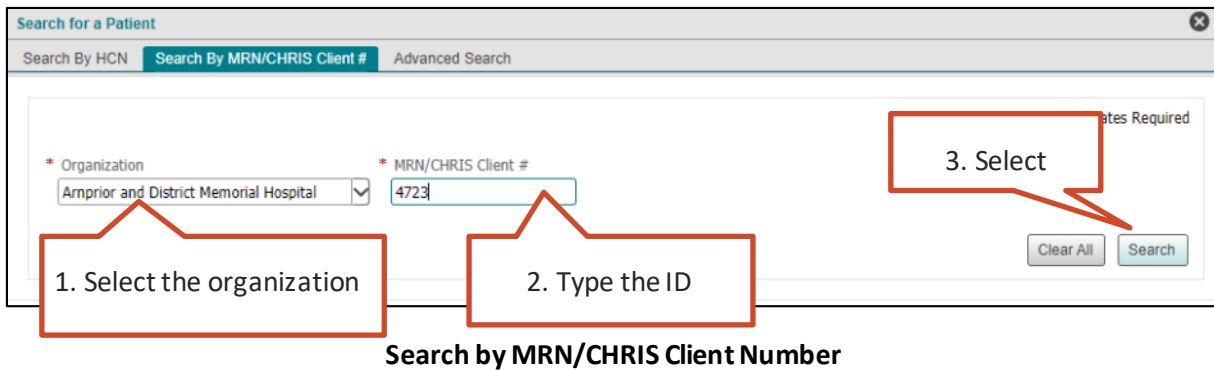


**Matching organization names are suggested as you type in the Organization field**

2. MRN/CHRIS Client #
  - Enter the ID number
  - e.g., “A1258647”

*Notes:*

- Both fields are mandatory
- Alphabetic characters in any ID number are case sensitive



## Advanced Search

Search for a patient using the fields listed below.

1. Enter Last Name and First Name and at least one of i) DOB (Date of Birth) or ii) Street Address and City into the search window. Additional fields are optional:
  - Last Name
    - This is a required field
    - e.g., "Smith"
  - First Name
    - This is a required field
    - e.g., "Mary"
  - Middle Name
    - e.g., "Louise"
  - DOB
    - Enter the patient's date of birth by typing the date directly into the field or using the calendar widget ([Calendar](#))
    - e.g., "01 Jan 1975"
  - Gender
    - Select the patient's gender from the drop-down list (male, female, unknown)
  - Street Address
    - Enter the patient's street address
    - If an exact match is not found, sub-string matching is used on this field
    - e.g., "50 Maple Rd."
  - City
    - Enter the patient's city of residence
    - If an exact match is not found, sub-string matching is used on this field



- e.g., “Toronto”
- Postal Code
  - Enter the Canadian or international postal code for the patient
  - e.g., “X1X 6Y6”
- Phone Number
  - Enter the patient’s ten digit phone number (including the area code)
  - e.g., “416-555-1234”

2. Select Search

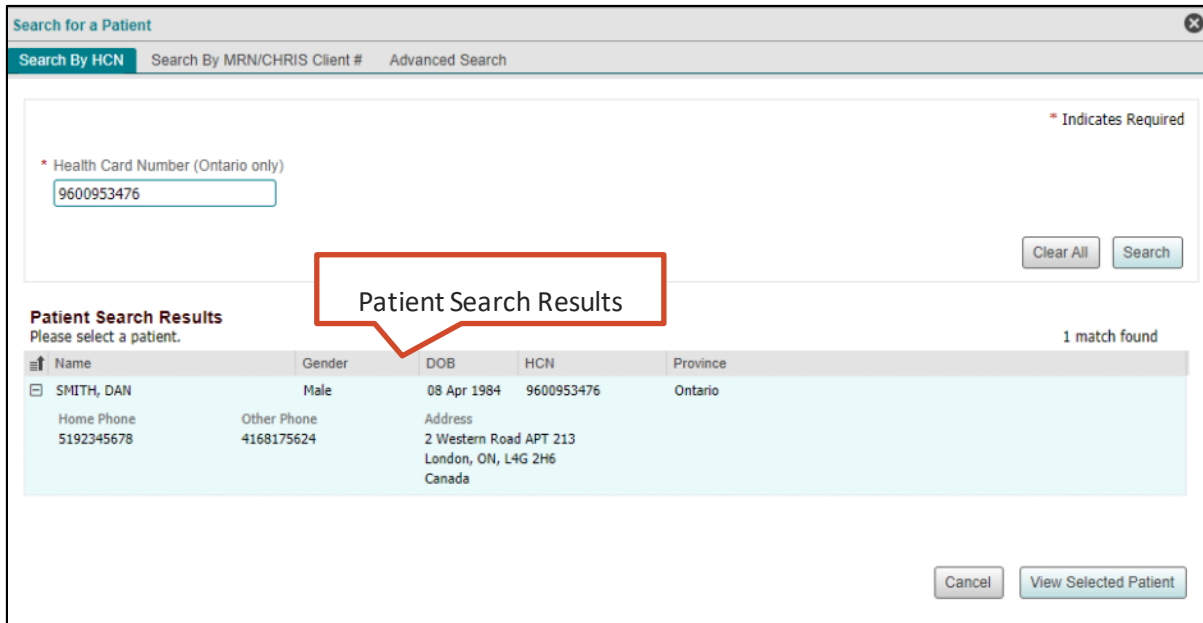
*Note:* Fields are not case sensitive.

The screenshot shows a web application window titled "Search for a Patient" with three tabs: "Search By HCN", "Search By MRN/CHRIS Client #", and "Advanced Search". The "Advanced Search" tab is active. Below the tabs, there is a text prompt: "Enter Last Name, First Name and either DOB OR Street Address and City. All other fields are optional." The form contains several input fields: "Last Name" (with "Smith" entered), "First Name" (with "John" entered), "Middle Name", "DOB (DD MMM YYYY)" (with "07 Jan 1956" and a calendar icon), "Gender" (with "Male" selected in a dropdown), "Street Address", "City", "Postal Code", and "Phone (999-999-9999)". At the bottom right, there are "Clear All" and "Search" buttons. Two red callout boxes are overlaid on the form. The first callout box, pointing to the name and DOB fields, contains the text: "1. Enter first name, last name and one of DOB OR (Street Address + City). Add additional known fields to increase search accuracy." The second callout box, pointing to the "Search" button, contains the text: "2. Select".

**Advanced Search**

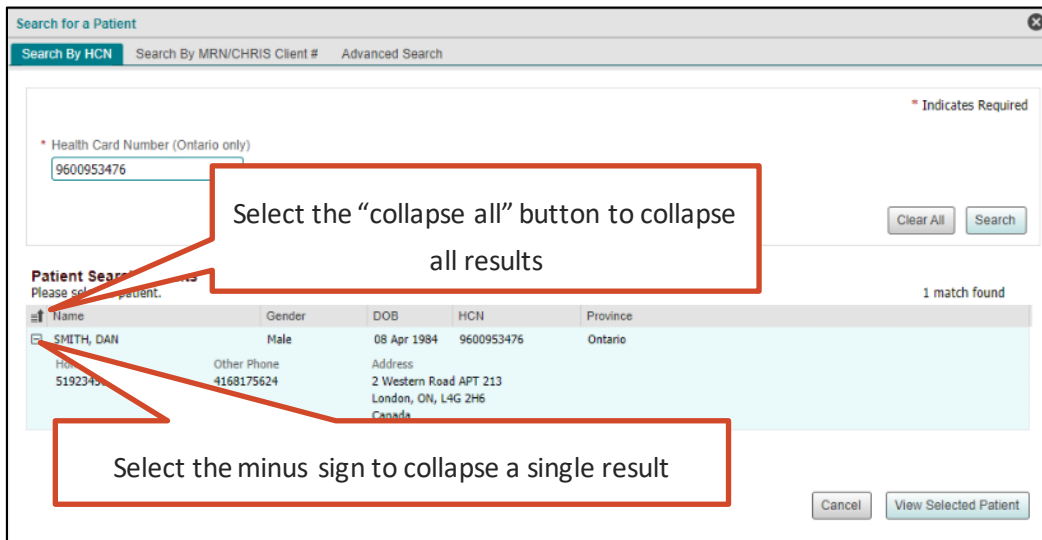
## Select a Patient

After entering patient data into one of the available search options and selecting Search, the **Patient Search Results** table appears at the bottom of the window. The search results display as an expanded scrollable list with the top five best matching results.



### Patient Search Results Table

The patient's name, gender, DOB, Ontario HCN as well as phone number and address are displayed for all three search options. Select the minus sign (☐) to collapse a single result or the collapse all button (☰) to collapse all results to save screen space.



### Collapsing Search Results

If there are no patients matching the search criteria, the portlet displays 'No patient for these criteria' in the **Patient Search Results** table. Enter more information in the search criteria.

**Patient Search Results**  
Please select a patient. 0 matches found

Name	Gender	DOB	HCN	Province
No patient for these criteria				

### No Patient Search Matches

*Note:* In rare instances, it may be impossible to uniquely identify potential matches. When this happens, an error message displays, instructing you to contact the Service Desk.

## Putting a Patient into Context

To view the patient's information, the user must put the patient into context. You can do this in two ways:

- A. Double click the patient row
- B. Select the patient row to choose it, select the View Selected Patient button

*Note:* The View Selected Patient button is not enabled until a row is selected to choose a patient.

**Search for a Patient**

Search By HCN | Search By MRN/CHRIS Client # | Advanced Search

\* Indicates Required

\* Health Card Number (Ontario only)

Clear All Search

**Patient Search Results**  
Please select a patient. 1 match found

Name	Gender	DOB	HCN	Province
SMITH, DAN	Male	08 Apr 1984	9600953476	Ontario
Home Phone 5192345678	Other Phone 4168175624	Address 2 Western Road APT 213 London, ON, L4G 2H6 Canada		

With the patient's row selected, Select View Selected Patient

Cancel View Selected Patient

### View Selected Patient Button

The ClinicalViewer does the following:

- Closes the search window
- Opens the Summary View (or default view, if the user has changed it) on the Patient Care tab
- Displays the patient demographics in the patient banner
- Displays the patient information in the portlets, if any is available for the current time interval

## Patient Search Result Preferences

When the patient search results are displayed, the results are displayed using all available columns and are sorted in descending order by Name. The following display preferences are available:

- Sort the table by Name, Gender, or DOB, in ascending or descending order
- Adjust the width of any column

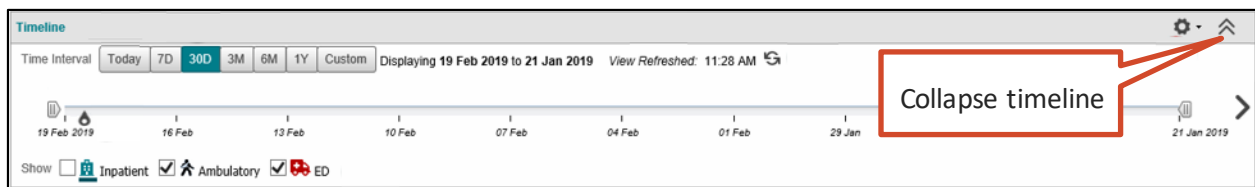
*Note:* Preferences are not saved when the 'Search for a Patient' window closes.

# Clinical Data Components


## Timeline

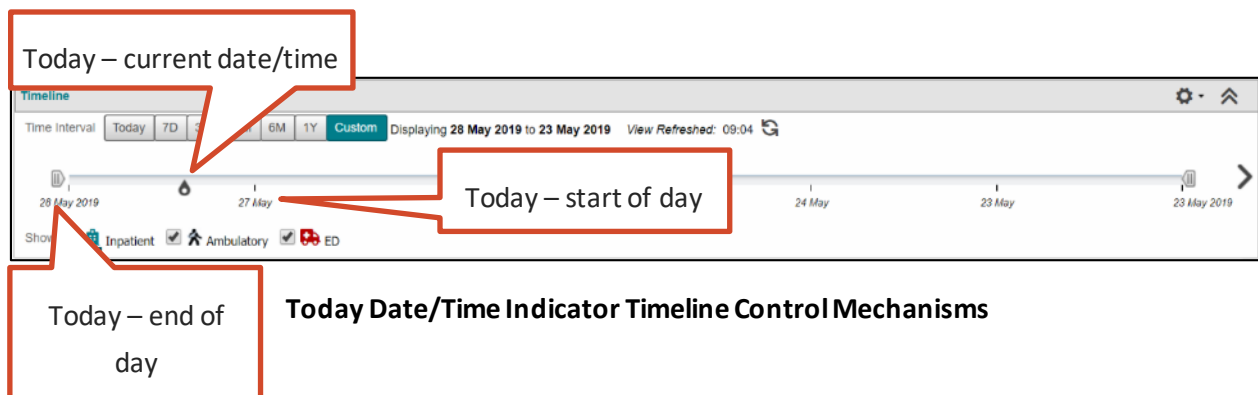
The timeline controls the date range for the patient information that appears in the components on the Patient Care tab. Information displayed within each portlet is within the selected time frame unless otherwise specified.

The default time interval is 30 days back from today, with the most recent date at the left end of the timeline. The up arrow button at the top right with the hover-over 'Select to minimize' allows a user to collapse the timeline, providing more screen real estate for clinical information.

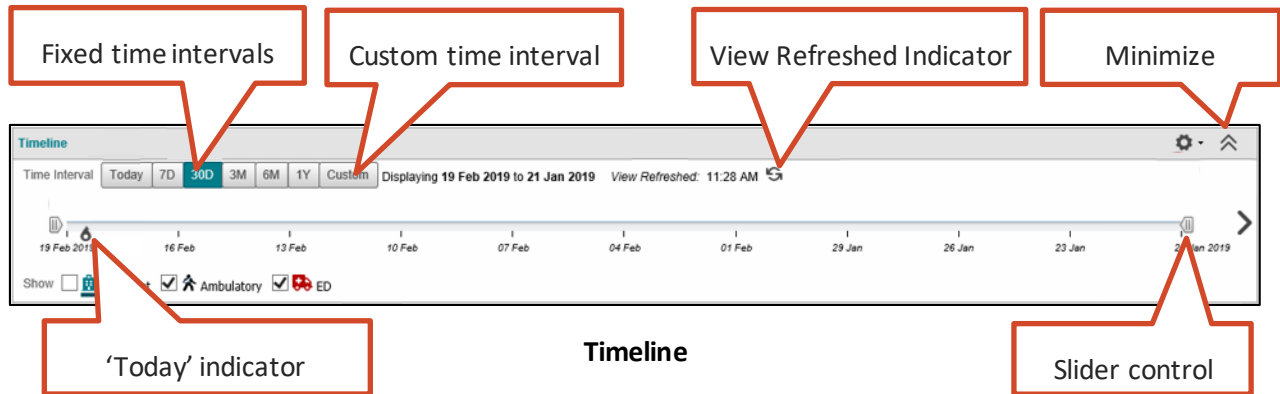


**Timeline (30 days)**

When today's date appears on the timeline, an indicator  represents the current date/time position. Additionally, when the timeline range is short enough, today's date displays for the full day, indicating both the start and end of the day.



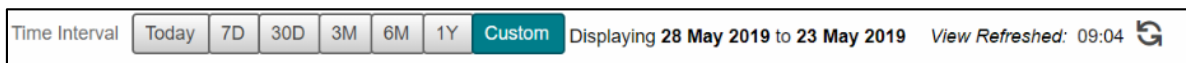
When first displayed, the time interval defaults to 30 days back from the current date. However, there are multiple ways that you can change the displayed time interval:



*Note:* In order to populate patient information across all portlets, the timeline is greyed out while information is loading. You cannot interact with the timeline until all portlets have completed loading.

## Fixed Time Intervals

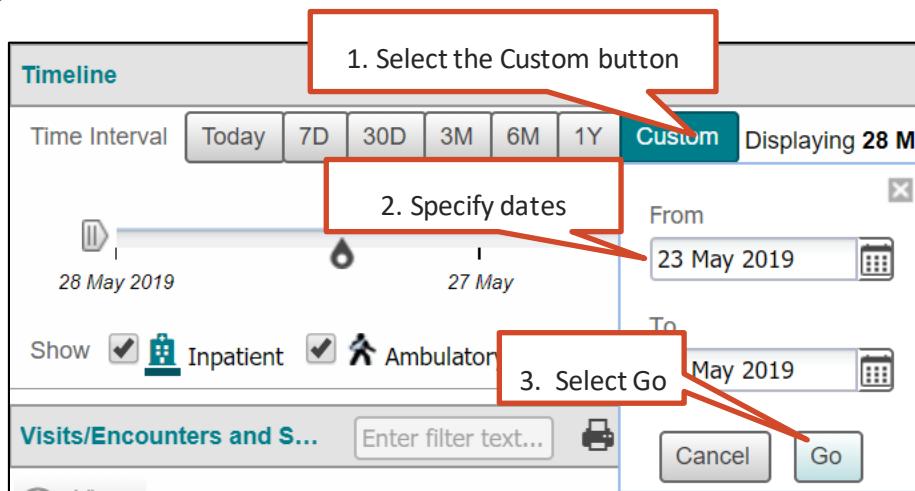
Select a time interval button to set the time range (Today, 7 days, 30 days, 3 months, 6 months, 1 year). This changes the time interval for all portlets.



**Fixed Time Intervals**

## Custom Time Interval

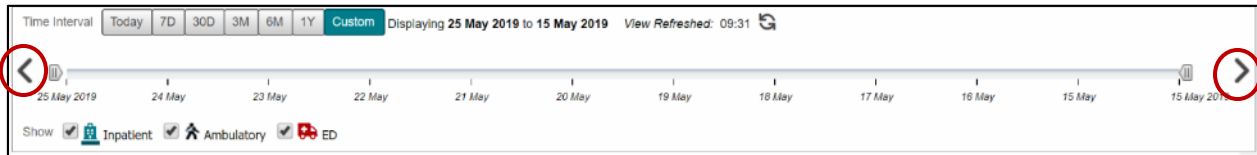
1. Select Custom to open the custom date range dialog
2. Enter the From and To dates for the custom time range ([Calendar](#))
3. Select Go



**Custom Time Interval**

## Time Interval Chevrons

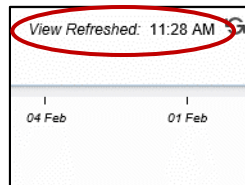
Select the arrow shaped chevron  $\langle \rangle$  at either end of the timeline to view the previous or next time interval of the same duration as the one currently chosen. If the most recent date on the timeline is set to the current date, the left chevron will not be visible.



Arrow Shaped Chevrons

## View Refreshed Indicator

Indicates the time when the ClinicalViewer last requested patient information from the clinical data repositories. It does NOT indicate when information in the clinical repository was last updated.

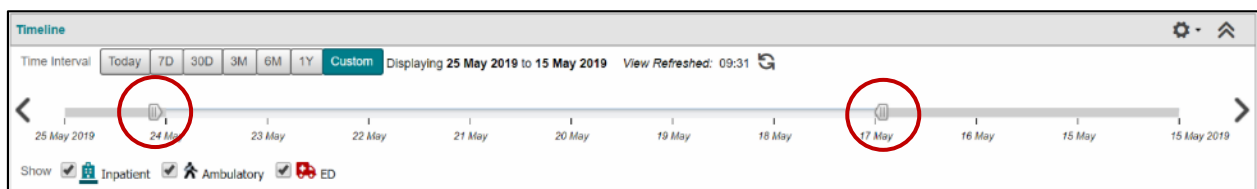


View Refreshed Indicator

## Slider Controls

Drag the beginning and/or ending sliders  $\square$  to change the time range within what is currently displayed.

In the example below, the original time frame was 30 days. By using the slider controls on either end of the timeline, you can further refine the time range and, hence, the data displayed in all of the portlets.



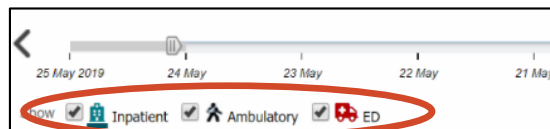
Reducing the Selected Time Range

## Display of Encounters

Three types of encounters appear on the Timeline: inpatient, ambulatory and emergency (ED).

Inpatient encounters are represented with an icon and a teal line, showing the length of the encounter. The icon indicates the start of the encounter. An icon only represents each ambulatory and emergency visit. If a patient has multiple visits on the same day of the same type (including overlapping inpatient encounters as may occur if a user is sent to another facility for a test or procedure), those visits will be represented by a single icon.

You can choose to hide any of the visit types from the timeline by unchecking the appropriate visit type in the legend. This DOES NOT change the information that appears in any of the portlets, only the icons that appear on the timeline.



**Encounter Legend**

Hovering over any encounter displays a tooltip with more information about the encounter, such as:

- Visit Date
- Visit Type
- Reason for Visit
- Organizations Visited




For icons representing multiple visits on the same day, details for all visits display in the hover.



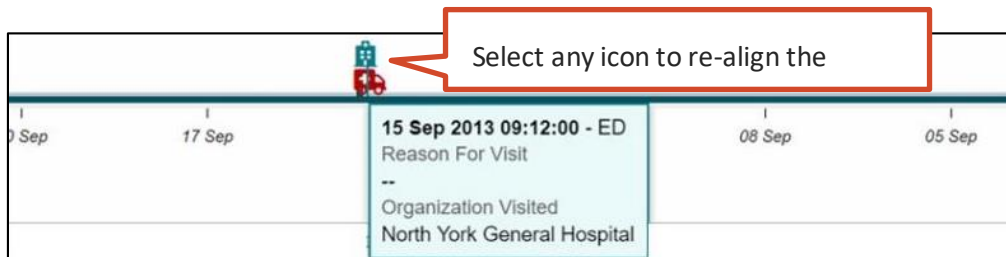
**Encounter Tooltip**



## Encounter Selection

1. Select an inpatient icon  on the timeline to display information ranging from two weeks prior to and two weeks after the selected encounter  
*Note:* If the inpatient visit is ongoing (there is no discharge date), selecting the icon displays information ranging from two weeks prior to and two weeks after the **start date** of the inpatient visit. Use the Custom Time Interval to select the appropriate range to avoid missing any information.
2. Select an ambulatory icon  on the timeline to display information ranging from two weeks prior to and two weeks after the start date of the encounter
3. Select an emergency icon  on the timeline to display information ranging from two weeks prior to and two weeks after the start date of the encounter

*Note:* Selecting an encounter icon does not limit the information in the portlets to be specific to the chosen encounter, only the approximate date range of the encounter information.



**Encounter Selection**

## Timeline Relationship to Portlet Dates

\* indicates the date field that is used by the timeline for the portlet


Portlet Name	Tab Name (if applicable)	Date(s) Included	Date Description	Relationship to Timeline
Medications		Dispensed Date*	Date when the medication was dispensed or the pharmacy service was provided	Display any medication that has been dispensed or pharmacy service that was performed within the selected time range on the timeline

Portlet Name	Tab Name (if applicable)	Date(s) Included	Date Description	Relationship to Timeline
<b>Visits/Encounters</b>		Date*	Visit date or encounter start date; displays date only not time	Display any visit/encounter that has begun, ended or is ongoing within the selected time range
		Discharge Date	Date of discharge for the inpatient encounter, not available for outpatient encounter types; displays date only not time	
<b>Documents/Notes</b>		Document Date/Time*	Date/time of document	Display any document/note with a dictation date within the selected time range
		Admit Date/Time	Admit date the document/note is associated with	
		Discharge Date/Time	Discharge date the document/note is associated with	

Portlet Name	Tab Name (if applicable)	Date(s) Included	Date Description	Relationship to Timeline
Lab Results	All Chemistry Hematology Blood Bank Pathology Microbiology Other	Collection Date/Time*	Specimen collected date/time	Display any lab result with a collection date/time within the selected time range
		Last Updated Date/Time	Date/time lab result was last updated	
Diagnostic Imaging		Procedure Date/Time*	Observation date/time	Display any report with a procedure date within the selected time range
Other Results	All Cardiology	Procedure Date/Time*	Observation date/time	Display any result with a procedure date within the selected time range
Community		Referral Start Date*	Equivalent to encounter admit date	Display any referral that has begun, ended or is ongoing within the selected time range
		Referral Close Date*	Equivalent to encounter discharge date	


### Timeline Relationship to Portlet Dates

## Minimizing the Timeline


Once you have selected the appropriate timeline, you can collapse it using the Collapse Button  to provide more viewing area for clinical content.



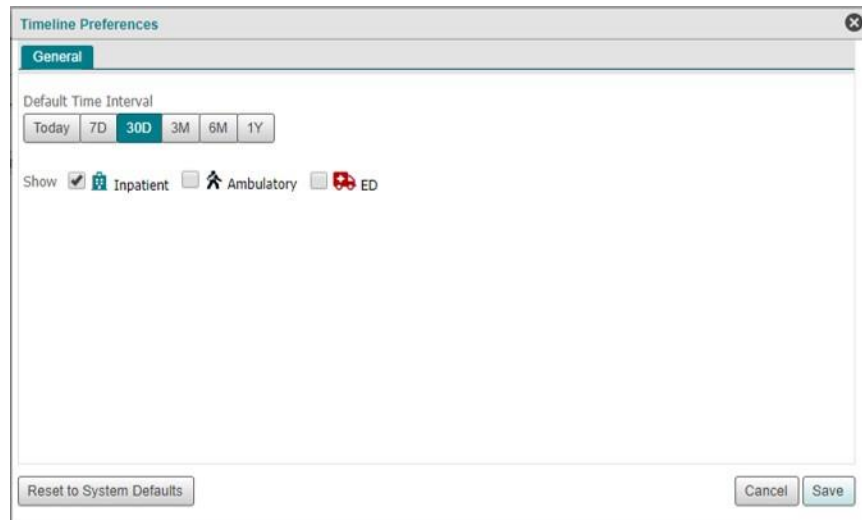
### Collapsed Timeline

You can restore a collapsed timeline to full size by using the expand button  in the top right corner.

## Preferences

You can access the user preferences for the timeline from the gear icon  on the right side of the timeline header. User preferences include:

- a) default time range that you can select from a list of pre-sets (today, 7D, 30D, 3M, 6M, 1Y)
- b) encounter icons that display on the timeline (Inpatient, Ambulatory and/or Emergency)



Timeline User Preferences

## Overriding Consent

A patient can request to have all or some of their personal health information (PHI) blocked. This block is referred to as a consent directive, which can be requested by a patient or substitute decision maker (SDM). A consent directive can be applied to PHI available in the Acute and Community Clinical Data Repository (acCCR) as viewed in the Documents/Notes, Visits/Encounters, Community and Other Results portlets, the Ontario Laboratories Information System (OLIS) as viewed in the Lab and Pathology Results portlet, the Digital Health Drug Repository (DHDR) as viewed in the Medications portlet's Dispensed Medications tab, and/or the Diagnostic Imaging Common Services (DI CS), as viewed in the Diagnostic Imaging portlet.

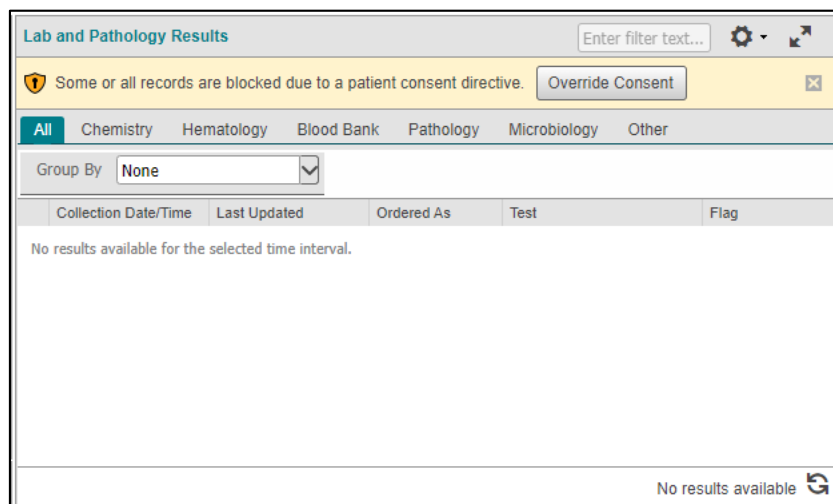
Types of Consent Directives:

- **Global:** Restricting access to all PHI in the acCCR for the patient (except demographic data in the Client and Consent registries)
- **Domain:** Restricting access to all PHI in an application or domain (according to the directives registered in the application or domain), i.e., from OLIS in the Labs portlet or from DHDR in the Medications portlet

- **Health Information Custodian (HIC) Record:** Restricting or allowing access to all PHI in the acCDR from a specific organization/facility for a specific patient
- **Health Information Custodian (HIC) Agent:**
  - All Agents - Restricting or allowing all users from a specific organization/facility to access the patient’s PHI in the acCDR
  - (Single) Agent - Restricting or allowing a specific user (individual person) to access the patient’s PHI in the acCDR

When consent directives are applied for a patient and PHI is then blocked, the following appears in every portlet with blocked PHI:

- A yellow notification bar with a warning stating “Some or all records are blocked due to a patient consent directive.”
- An “Override Consent” button on the yellow notification bar
  - Note: the “Override Consent” button does not display in the Diagnostic Imaging portlet as consent override is not supported for this portlet



**Display of Blocked PHI**

Consent directives are only applied on the Patient Care tab, after a patient has been selected. Therefore, a consent directive never prevents a patient from being found in a search or displayed in patient lists.

## Viewing Unblocked Data Only

It is possible that only selective PHI for a patient is blocked. If a consent directive is applied to only part of the PHI, the user can still access the PHI that is not protected by a consent directive. Messages continue to appear indicating that some or all results may be blocked as a reminder.

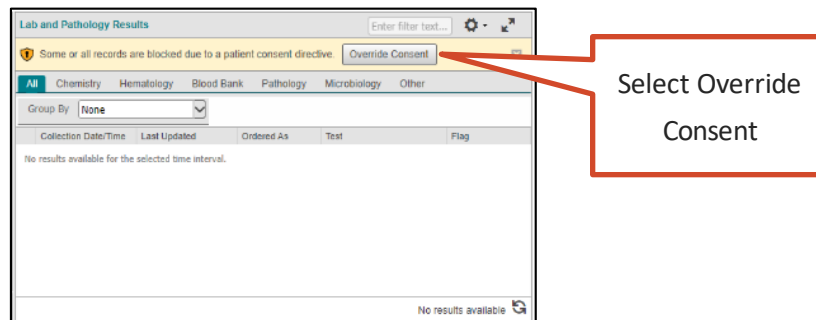
## Overriding Consent

### Notes:

- Overriding consent overrides all active consent directives for the patient; it is not limited to PHI in the current portlet
- Overriding consent is not supported by the Diagnostic Imaging portlet
- If a consent directive is in place for DHDR, the warning message will display, independent of Timeline settings. The user will not know if the current time interval includes blocked PHI or not until the consent override is completed.

If an override of consent is required:

1. Select Override Consent



**Override Consent Button**

*Note:* While data is loading, the Override Consent button remains inactive in all portlets. Only when data has finished loading in all portlets, does the Override Consent button become active.

2. Select one of the four available override reasons:
  - Option 1: Express consent obtained from patient ([Option 1](#))
  - Option 2: Express consent obtained from a Substitute Decision Maker ([Option 2](#))
  - Option 3: Significant Risk of Serious Bodily Harm to the Patient ([Option 3](#))
  - Option 4: Significant Risk of Serious Bodily Harm to Other(s) ([Option 4](#))

**Override Consent Dialog**

## Overriding Consent: Express Consent Obtained from Patient

1. Select 'Express consent obtained from patient'
2. If a consent block is in place on the Medications portlet's Dispensed Medications tab, select the consent form link to print the hard-copy consent form. Obtain signature from the patient and keep in your records as per your organization's policies
3. Select 'Override Consent and View Patient Record' to complete the override

**Consent Override, Option 1**

## Overriding Consent: Express Consent Obtained from Substitute Decision Maker (SDM)

1. Select 'Express consent obtained from Substitute Decision Maker (SDM)'
2. If a consent block is in place on the Medications portlet's Dispensed Medications tab, select the consent form link to print the hard-copy consent form. Obtain signature from the SDM and keep in your records as per your organization's policies
3. Enter the SDM first name and last name  
*Note:* The first name has a maximum length of 20 characters. The last name has a maximum length of 30 characters. Ensure that the text entered into these fields is within these limits.
4. Select the SDM's relationship to the patient from the Relationship to Patient (SDM) drop-down menu.
5. If you chosen Sibling or Other Relative in step 5, you will need to specify the relationship between the SDM and the patient in the 'Specify Relationship' field.
6. Select 'Override Consent and View Patient Record' to complete the override

Override Consent

Access to one or multiple records is restricted based on the patient's instructions. You may access these records under limited circumstances. Please select which applies:

Express consent obtained from patient (Consent documented in local record)  
NOTE: For Dispensed Medications you must print and complete consent form and save it for legal purposes.

Express consent obtained from Substitute Decision Maker (SDM) (Consent & SDM information documented in local record)  
NOTE: For Dispensed Medications you must print and complete consent form and save it for legal purposes.

\* SDM's Last Name  \* SDM's First Name

\* SDM's Relationship to Patient  \* Specify Relationship

Guardian of the Person

Attorney for Personal Care

Representative appointed by Consent and Capacity Board

Spouse/Partner

Parent

Child

Sibling (Specify)

Other Relative (Specify)

For more information on Consent Directives review the Privacy and Security Tip Sheet.

Cancel Override Consent and View Patient Record

### Consent Override, Option 2

## Overriding Consent: Significant Risk of Bodily Harm to the Patient

1. Select 'Significant Risk of Serious Bodily Harm to the Patient'
2. Select 'Override Consent and View Patient Record' to complete the override



**Override Consent**

Access to one or multiple records is restricted based on the patient's instructions. You may access these records under limited circumstances. Please select which applies:

**Express consent obtained from patient** (Consent documented in local record)  
NOTE: For Dispensed Medications you must print and complete [consent form](#) and save it for legal purposes.

**Express consent obtained from Substitute Decision Maker (SDM)** (Consent & SDM information documented in local record)  
NOTE: For Dispensed Medications you must print and complete [consent form](#) and save it for legal purposes.

\* SDM's Last Name  \* SDM's First Name

\* SDM's Relationship to Patient  \* Specify Relationship

**Significant Risk of Bodily Harm to the Patient**  
NOTE: This option cannot be used to unblock Labs (OLIS) and Dispensed Medication (DHDR).

**Significant Risk of Bodily Harm to Other(s)**  
NOTE: This option cannot be used to unblock Labs (OLIS) and Dispensed Medication (DHDR).

NOTE: Choosing consent obtained from patient OR from SDM will allow Labs and Dispensed Medications data to be visible by all other users at your organization.

For more information on Consent Directives review the [Privacy and Security Tip Sheet](#).

### Consent Override, Option 3

## Overriding Consent: Significant Risk of Bodily Harm to Other(s)

1. Select 'Significant Risk of Serious Bodily Harm to Other(s)'
2. Select 'Override Consent and View Patient Record' to complete the override

**Override Consent**

Access to one or multiple records is restricted based on the patient's instructions. You may access these records under limited circumstances. Please select which applies:

**Express consent obtained from patient** (Consent documented in local record)  
NOTE: For Dispensed Medications you must print and complete [consent form](#) and save it for legal purposes.

**Express consent obtained from Substitute Decision Maker (SDM)** (Consent & SDM information documented in local record)  
NOTE: For Dispensed Medications you must print and complete [consent form](#) and save it for legal purposes.

\* SDM's Last Name  \* SDM's First Name

\* SDM's Relationship to Patient  \* Specify Relationship

**Significant Risk of Bodily Harm to the Patient**  
NOTE: This option cannot be used to unblock Labs (OLIS) and Dispensed Medication (DHDR).

**Significant Risk of Bodily Harm to Other(s)**  
NOTE: This option cannot be used to unblock Labs (OLIS) and Dispensed Medication (DHDR).

NOTE: Choosing consent obtained from patient OR from SDM will allow Labs and Dispensed Medications data to be visible by all other users at your organization.

For more information on Consent Directives review the [Privacy and Security Tip Sheet](#).

### Consent Override, Option 4

*Notes:*

- Options 3 and 4 do **not** override any blocked PHI in the Lab and Pathology Results portlet (OLIS) PHI nor any blocked Medications (DHDR) PHI because express consent is required to unblock these two portlets
- If you have already selected Option 3 or 4, and wish to unblock OLIS or DHDR PHI, you must:
  1. Obtain express consent
  2. Follow instructions for [Option 1](#) or [Option 2](#) accordingly

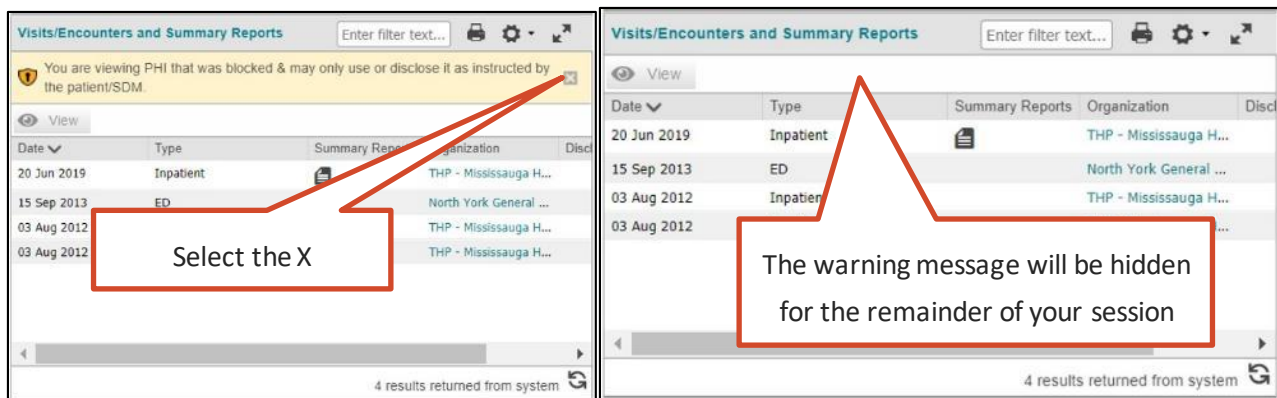
Once the override has been completed, all information in the portlets is refreshed and blocked PHI is displayed. The following message appears on a yellow notification bar in any portlet (with the exception of the Lab and Pathology Results and Medications portlets) where blocked PHI is being viewed:

***“You are viewing PHI that was blocked & may only use or disclose it as instructed by the patient/SDM.”***



### Viewing Blocked PHI

You can close the yellow notification bar by selecting the X on the notification bar. Note that although you may close such warning and disclaimer messages, certain functions such as changing views or resetting the time interval, may cause the messages to reappear.



### Closing the PHI warning message

In the Lab and Pathology Results portlet, the following message displays if blocked PHI is being viewed:

***“One or more of the tests in the view may have been blocked by the patient as indicated within each OLIS report.”***

Notes:

- When consent is overridden for Lab and Pathology Results and Medications PHI, access is provided to the patient’s record for any user from the user’s organization for 4 hours. For acCDR data, the consent override provides access to the patient’s record until 11:59pm that same day for that user only.
- All consent directive overrides must be reviewed by the Chief Privacy Officer of the organization.


## Patient Summary Views and Custom Views

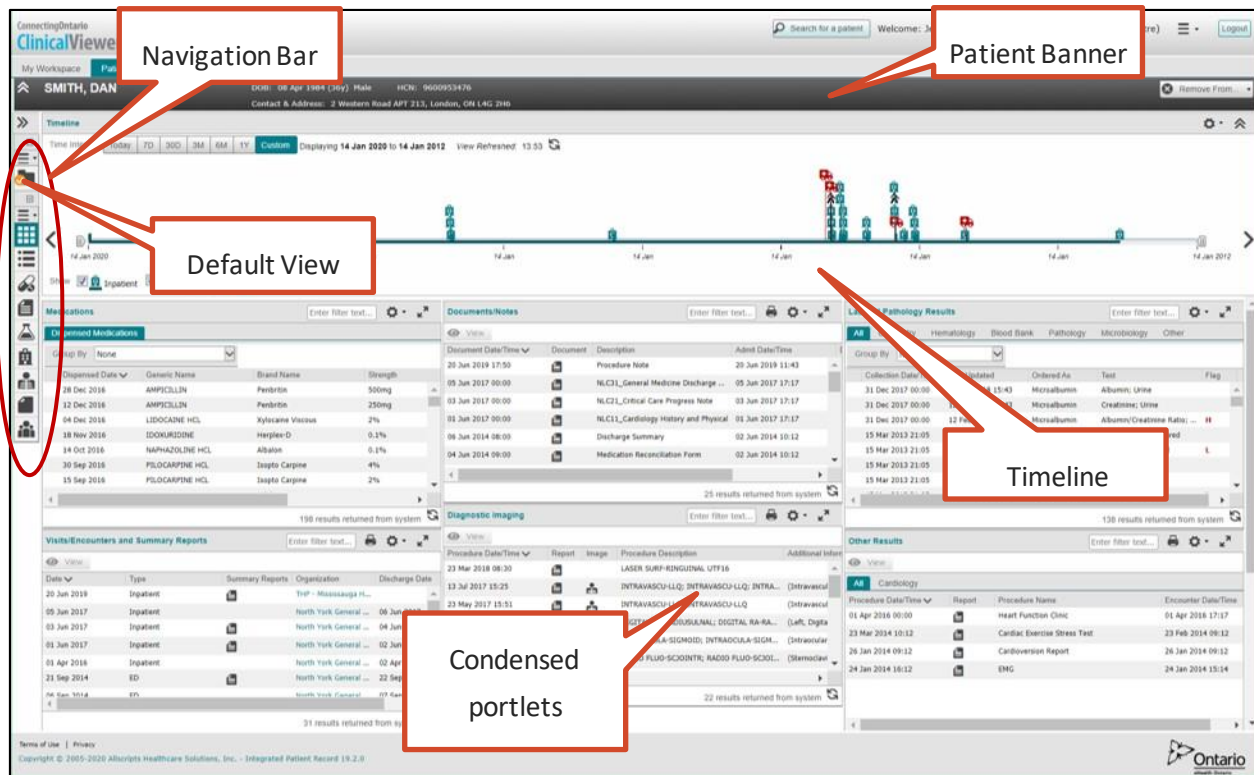
Summary views are used to provide a quick overview of recent activity in a patient’s record. You can view each portlet on the Summary View page, Summary List View page or on the individual portlet page for that portlet. ([General Navigation](#))

You can also create your own custom views with any combination of portlets displayed in the view.

### Summary View

When first accessing the Patient Care tab, the default view is the Summary View. This is a consolidated view of all of the portlets, and shows personal health information 30 days back from today. Each portlet is in its condensed format and does not show all information columns; the Diagnostic Imaging portlet is an exception to this in that it is always displayed in full with all columns visible.

*Note:* The view that appears on the Patient Care Views navigation bar with a checkmark icon  is the default view. If you have not selected a different default, the default view is the Summary View (defined below).



## Summary View

To see the full-sized portlet, use the Patient Care Views Navigation Bar to select the portlet of interest ([Navigation Bar](#)) or Summary List View.

## Summary List View

This view presents all of the full-sized portlets in a single vertical (stacked) view. All default columns are displayed.

The screenshot displays the ClinicalViewer interface for a patient named Dan Smith. The top navigation bar includes the logo, a search field, and user information. The patient's details (DOB, gender, HCN, and address) are shown at the top. The main area is divided into a 'Timeline' section with a calendar view and a 'Community' section with a 'Summary List View' table. A red callout box highlights the bottom of the table, indicating that all portlets are included and users should scroll down to view them.

Referral Start Date	Referral Type	Reason for Referral	Service Details	Status	Organization	Referral Close Date
21 Jul 2014		Acute frontal serv			Toronto Central LHIN	23 Jul 2014
20 Jul 2014		Acute frontal serv			Toronto Central LHIN	22 Jul 2014
20 Mar 2014	Family Health				Toronto Central LHIN	23 Mar 2014
20 Mar 2014	Family Health				Toronto Central LHIN	23 Mar 2014
30 Jan 2014	Inpatient General Medicine				Toronto Central LHIN	31 Jan 2014
30 Jan 2014	Digestive System				Toronto Central LHIN	31 Jan 2014
29 Jan 2014	Inpatient Cardiology				Toronto Central LHIN	30 Jan 2014
29 Jan 2014	Inpatient Cardiology				Toronto Central LHIN	30 Jan 2014
27 Jan 2014					Toronto Central LHIN	29 Jan 2014
27 Jan 2014					Toronto Central LHIN	29 Jan 2014
27 Jan 2014					Toronto Central LHIN	29 Jan 2014


## Summary List View

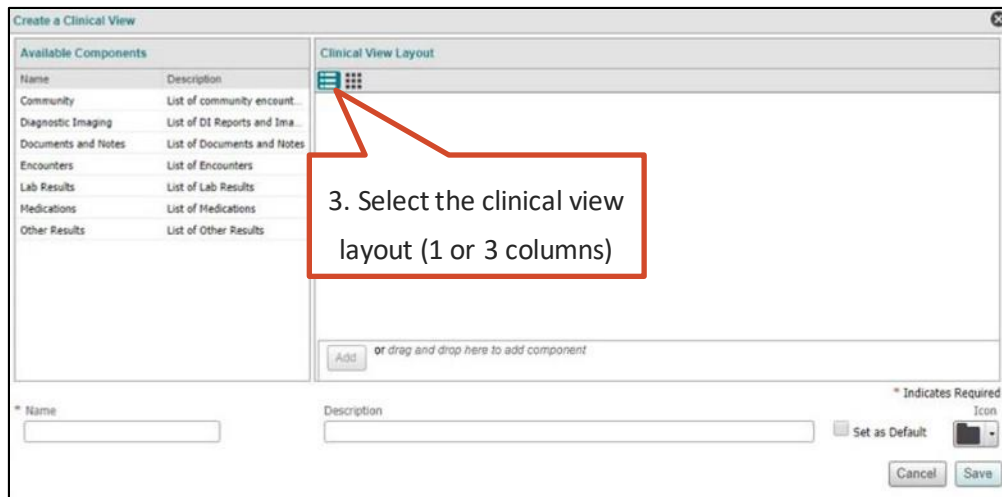
## Working with Custom Views

You can create custom views in the My Views section of the Patient Care Views Navigation Bar. Custom views allow you to select a particular set of components that you wish to view as a group and in a particular layout. Once a custom view has been created, you can edit, duplicate, and delete it, or set it as the default view.

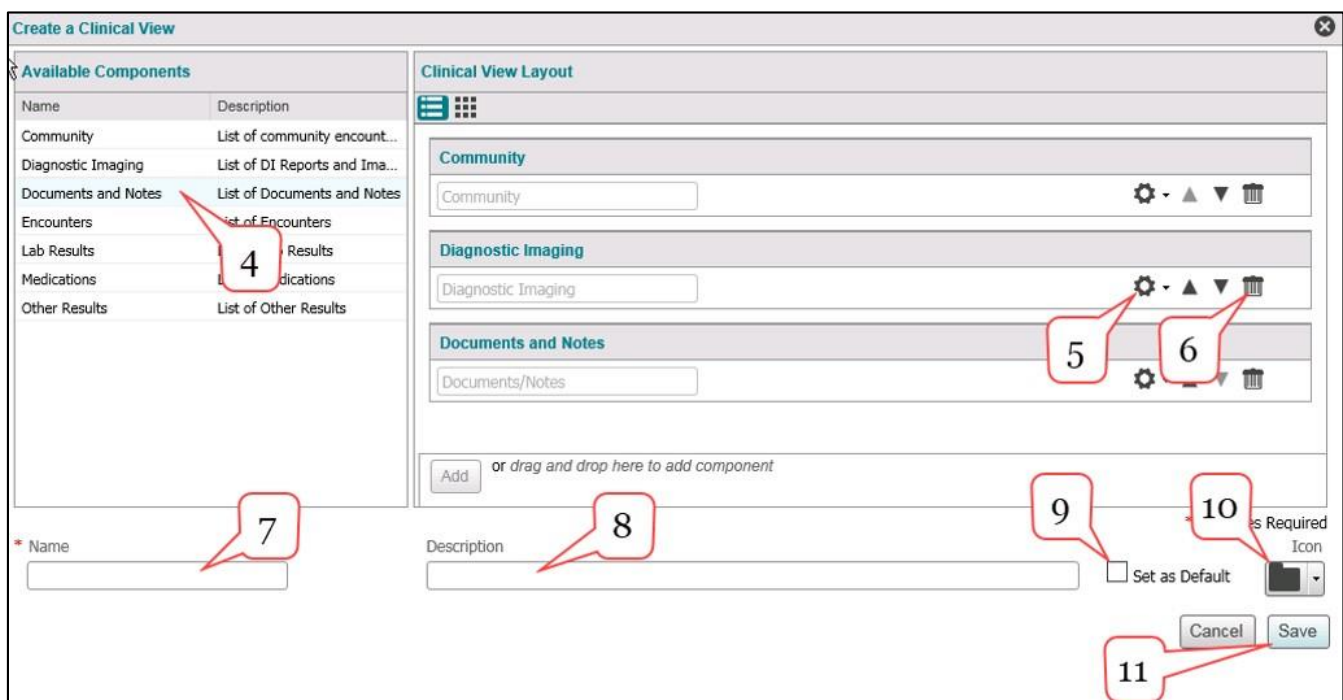
## Creating a Custom View

To create a custom view:

1. In the Patient Care tab, expand the Patient Care Views Navigation Bar, if necessary
2. In the My Views section, select Add New 
3. From the Create a Clinical View dialog box, select a Clinical View Layout (Single Column Layout or Three Column Layout)



### Create a Clinical View Dialog



### Customize a Custom View

4. The available components (portlets) are listed under 'Available Components':
  - a. Add a component
    - For a single column view, select a component, then Select Add
    - For a three column view, select the Add button that corresponds to the column you wish to populate

OR

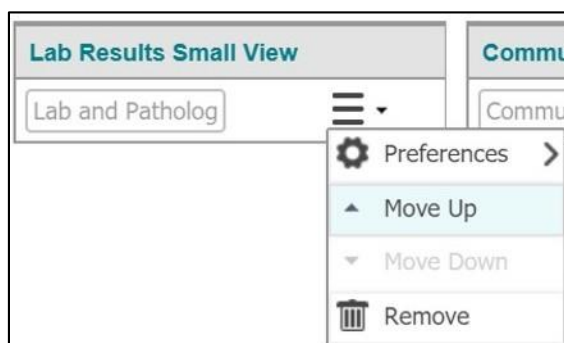
- Drag a component and drop it into the appropriate place in the Clinical View Layout section

b. Stack the components, as required:







- Drag the components up or down the column to the desired position

OR

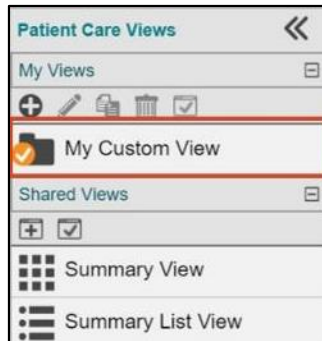
- Change the stack order by stepping components up or down
  - For a single column view, select the up and down ▲ ▼ arrows available on the component
  - For a three column view, use the dropdown to select between Move Up and Move Down action items from the Options menu



### Reorganize a column stack in a three column view

5. Change the display settings for any of the components:
  - For the single column view, select Settings  then List Display Settings
  - For the three column view, select  then Preferences  then List Display Settings
  - To apply changes to the component, select Save
6. To remove a component from the Clinical View Layout:
  - For the single column view, select Delete 
  - For a three column view select List  then 
7. Enter the name of your custom view
8. Enter a description of your custom view, if desired
9. Set the view as your Default Clinical View, if desired
10. Select an icon to depict your custom view
11. Select Save

The new custom view is added to your My Views section of the Patient Care Views Navigation Bar.




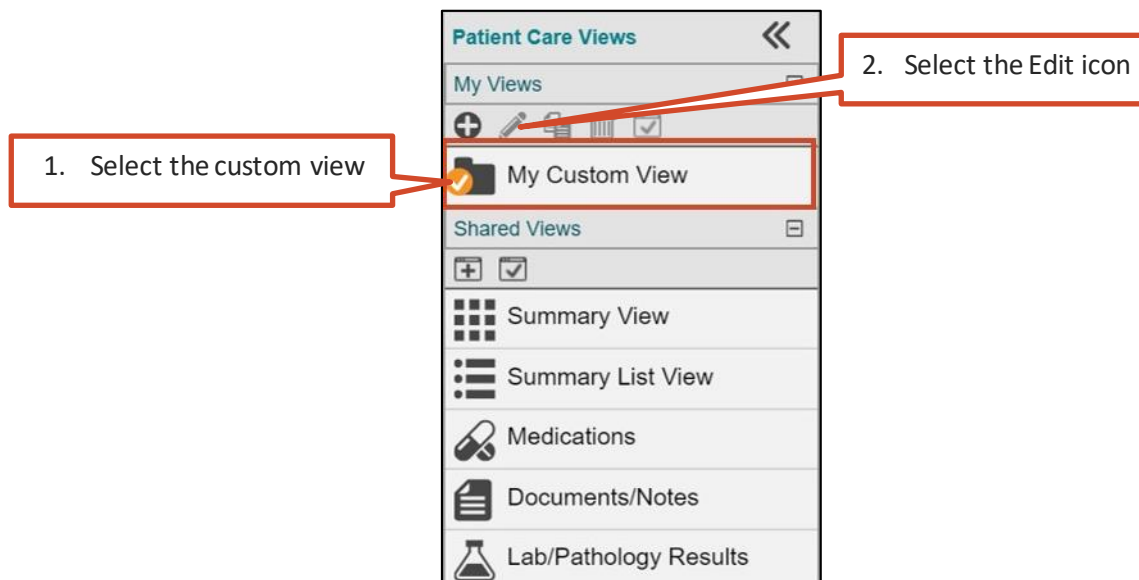
**Patient Care Views Navigation Bar with New View**

## Editing a Custom View

**Warning:** Changing the Clinical View Layout from Single Column to 3-Column, and vice versa, will remove all components.

To make changes to a custom view:

1. Select the custom view to be edited
2. Select Edit  on the My Views toolbar




**Patient Care Views Navigation Bar with Custom View**

3. Edit the custom view as described in [Creating a Custom View](#)



## Duplicating a Custom View

To duplicate a custom view:

1. Expand the navigation bar, if necessary
2. Select the custom view to be duplicated
3. Select 'Duplicate Selected Clinical View'  from the My Views toolbar. A message will appear informing you that the view is being copied:




4. A copy of the selected view is added to My Views
5. Select and [edit](#) the duplicate view as required



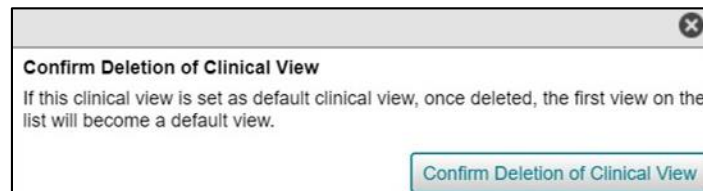
### Duplicate Custom View

## Deleting a Custom View

To delete a custom view:

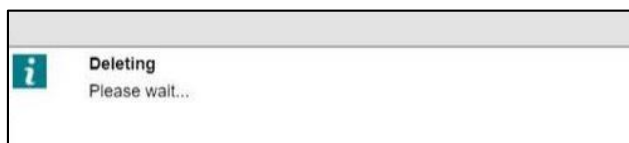
1. Expand the navigation bar, if necessary
2. Select the custom view you intend to delete
3. Select Delete  from the My Views toolbar

A confirmation message displays



### Deleting a Custom View

4. Select Confirm Deletion of Clinical View. A message will appear informing you that the view is being deleted:



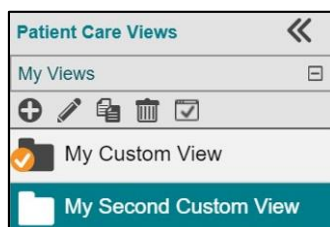
5. The clinical view is removed from the My Views section

## Setting a Custom View as Default

To set a custom view as the default view:

1. Expand the navigation bar, if necessary
2. Select the custom view you intend to set as your default
3. Select 'Sets the Default Patient Care View'  from the My Views toolbar

The default check mark icon displays on the icon for the selected view, and the view is displayed by default whenever you view a patient's information on the Patient Care tab



**Set the Default View**

## Medications Portlet

The Medications portlet displays a subset of dispensed medications and pharmacy professional services via a connection to the provincial Digital Health Drug Repository (DHDR) for patients who have a known Ontario Health Card Number. Refer to the [Data Summary](#) for information available in DHDR.

## Introduction to DHDR

The DHDR includes the following information:

- publicly funded drugs (including those listed on the Formulary or approved through the Exceptional Access Program) dispensed in Ontario and paid for by the Ontario Drug Benefit program (recorded by dispensers using an Ontario Health Number)
- Most publicly funded drugs dispensed in Ontario and eligible under Special Drugs Program

- Most publicly funded drugs dispensed in Ontario and eligible under Special Drugs Program
- Drugs dispensed in Ontario to households pending program eligibility with Trillium Drug Program
- Professional pharmacy services provided by a pharmacist in Ontario and paid for by the ministry
- Monitored drugs (narcotics and controlled substances), regardless of payor, when the approved identification used was a valid Ontario Health Number, including monitored drugs reimbursed by private insurance or cash
- **COVID-19 vaccination and testing information** documented in COVax<sub>ON</sub>, including information on all COVID-19 vaccines administered in the province, as well as COVID-19 testing information when the test is performed at a community pharmacy. COVID-19 test results display in the Lab and Pathology Results portlet

DHDR includes:

1. Publicly funded drug and pharmacy service information
  - Reflects information the dispensing pharmacy submits to the Ministry of Health for reimbursement
  - Includes over 10 years of information about publicly funded drugs (including monitored drugs and COVID-19 information) and publicly funded pharmacy services
2. Narcotics Monitoring System (NMS) information
  - Includes over 8 years of information about monitored drugs (narcotics and controlled substances) dispensed in Ontario regardless of payor

DHDR information is advisory only and is not intended to replace sound clinical judgment. As it may not include all the current medications a patient is utilizing at any time, or all the pharmacy services that a patient has received, the user is advised to consider the following:

- the information should be discussed and confirmed with the patient or other source(s)
- the patient may not have picked up their medications or may not be taking them as prescribed
- the patient may be taking other medications such as over-the-counter or privately-paid medications (excluding narcotics and controlled substances)
- it does not include hospital-dispensed medications
- it does not reflect details such as:
  - whether a prescription is new or a refill
  - changes to drug therapy (e.g., discontinued, dosage)
  - current use of medication
  - instructions for use (e.g., frequency)

It is recommended to contact the dispensing pharmacy or prescriber for additional information or clarification.

For more information about the DHDR, visit [www.ontario.ca/mydruginfo](http://www.ontario.ca/mydruginfo).

The Medications portlet displays information from the DHDR in the Dispensed Medications tab in three views.

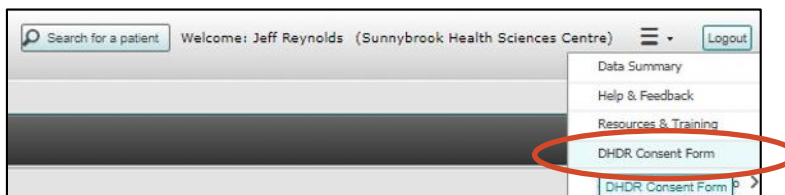
1. Summary View – Condensed portlet
2. Summary List View – Full-sized portlet
3. Individual Portlet View – Full-sized portlet

Details View of this portlet is available in each view that displays additional details display below the Table section upon selecting a result. Not all details display to enhance usability.

## Consent Directive

If a consent override is required in order to access medication information for a patient, no information displays until the override has been completed ([Overriding Consent](#)). When selected, the override state is maintained for four hours.

When there is a consent block for DHDR data, the standard yellow override warning message and button appears and the following warning disclaimer is displayed above the default disclaimer: **“Some or all records are blocked due to a patient consent directive.”** Consent blocks for DHDR data are different from other portlets in that DHDR consent is at the patient level only. In order to override consent in the Medications portlet, you must print and complete a separate consent form that you can access from the Links menu in the header.

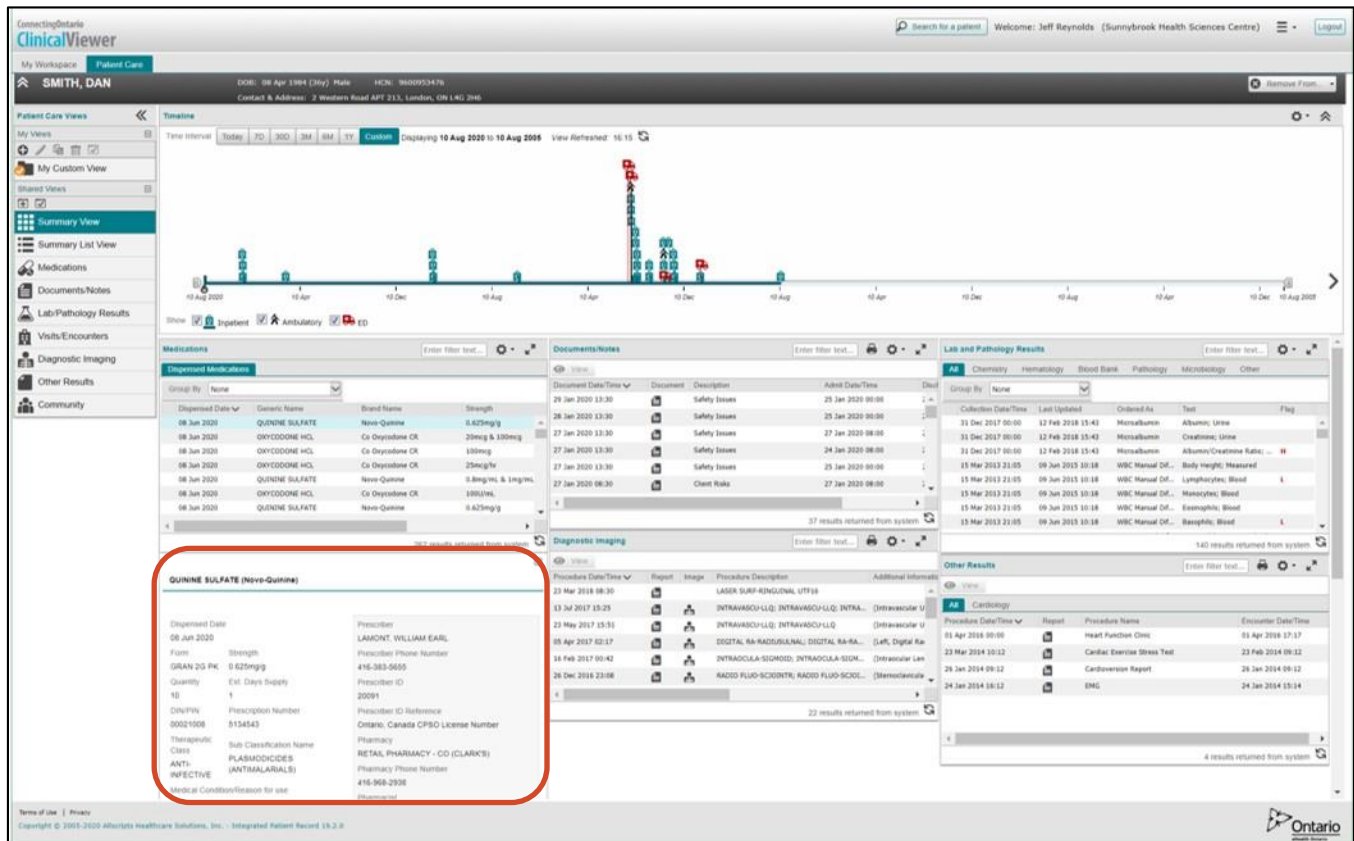


**Link to DHDR Consent Form from ClinicalViewer header**

DHDR sends a blocked data message to ConnectingOntario regardless of whether information exists for the given time range. Therefore, users do not know if medication information exists or not for the time range until the consent override is completed.

# Summary View

The Summary View – condensed portlets provides an at-a-glance view of a patient’s medications and pharmacy services. Information displays in two sections: Table and Details View.



## Summary Table – Details View

The results displayed have a dispensed date that falls within the selected timeline interval. In order to support an ‘at a glance’ view, only key information fields display in the Table section.

The following columns in the condensed view by default (an asterisk \* indicates which ones are locked):

- Dispensed Date\*
- Generic Name\*
- Brand Name\*
- Strength\*
- Form\*
- Quantity\*

You can [display](#) additional columns temporarily or permanently as outlined in the table [Medications Data Elements](#).

Dispensed Date	Generic Name	Brand Name	Strength	Form
08 Jun 2020	QUININE SULFATE	Novo-Quinine	0.625mg/g	GI
08 Jun 2020	OXYCODONE HCL	Co Oxycodone CR	20mcg & 100mcg	IN
08 Jun 2020	OXYCODONE HCL	Co Oxycodone CR	100mcg	IN
08 Jun 2020	OXYCODONE HCL	Co Oxycodone CR	25mcg/hr	IN
08 Jun 2020	QUININE SULFATE	Novo-Quinine	0.8mg/mL & 1mg/mL	IN
08 Jun 2020	OXYCODONE HCL	Co Oxycodone CR	100U/mL	IN
08 Jun 2020	QUININE SULFATE	Novo-Quinine	0.625mg/g	IN

262 results returned from system

**Medications Portlet – Condensed View**

Dispensed Date	Generic Name	Brand Name	Strength	Form	Quantity	Est. Days Supply	Pharmacy	Prescriber
08 Jun 2020	QUININE SULFATE	Novo-Quinine	0.625mg/g	GRAN 2G PK	19	1	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL
08 Jun 2020	OXYCODONE HCL	Co Oxycodone CR	20mcg & 100mcg	IN SOL	19	7	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL
08 Jun 2020	OXYCODONE HCL	Co Oxycodone CR	100mcg	IN SOL PK	18	9	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL
08 Jun 2020	OXYCODONE HCL	Co Oxycodone CR	25mcg/hr	INSERT	34	23	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL
08 Jun 2020	QUININE SULFATE	Novo-Quinine	0.8mg/mL & 1mg/mL	IN PD-VIAL PK	18	9	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL
08 Jun 2020	OXYCODONE HCL	Co Oxycodone CR	100U/mL	IN PD-10MG PK	19	10	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL
08 Jun 2020	QUININE SULFATE	Novo-Quinine	0.625mg/g	IN	17	8	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL
08 Jun 2020	QUININE SULFATE	Novo-Quinine	100U/mL	IN PD-VIAL PK	15	6	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL
08 Jun 2020	QUININE SULFATE	Novo-Quinine	0.8mg/mL & 1mg/mL	IN PD-10MG PK	39	21	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL
08 Jun 2020	QUININE SULFATE	Novo-Quinine	100U/mL	IN PD-10MG PK	27	18	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL
08 Jun 2020	OXYCODONE HCL	Co Oxycodone CR	0.625mg/g	IN	23	14	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL
08 Jun 2020	QUININE SULFATE	Novo-Quinine	100mcg	IN SOL	16	7	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL
08 Jun 2020	OXYCODONE HCL	Co Oxycodone CR	20mcg & 100mcg	IN SOL PK	13	4	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL
08 Jun 2020	OXYCODONE HCL	Co Oxycodone CR	100U/mL	IN PD-VIAL PK	26	17	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL
08 Jun 2020	QUININE SULFATE	Novo-Quinine	0.75mg	IN	27	18	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL
08 Jun 2020	QUININE SULFATE	Novo-Quinine	100mcg	IN SOL PK	12	3	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL
08 Jun 2020	QUININE SULFATE	Novo-Quinine	100mcg/hr	IN	37	18	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL

262 results returned from system

**QUININE SULFATE (Novo-Quinine)**

Dispensed Date	08 Jun 2020	Form	GRAN 2G PK	Quantity	19	Est. Days Supply	1
Strength	0.625mg/g	Prescriber	LAMONT, WILLIAM EARL	Prescriber Phone Number	416-383-5655	Prescriber ID	20091
Prescription Number	5134543	Prescriber ID Reference		Prescriber License Number	Ontario, Canada CPRO License Number		

**Medications Portlet – Details View**

## Details View

Details View is the section below Table View that displays additional detail about the patient’s medications. Not all details display to enhance usability.

*Note:* for medication names that are too long to fit within a column, an ellipsis (...) appears in the column to indicate that there is additional information.

To display Details View:

1. Select the medication (any row in the list)

2. Details View appears below the list to provide additional information about the selected medication

*Tip:* Once Details View is displayed, select the 'X' in the upper right corner to close it.

## Summary List View and Individual Portlet View

The full portlet view displays in the Summary List View and the Individual Portlet View as well as when the Summary View is expanded. The results displayed have a dispensed date that falls within the selected timeline interval. Information displays in two sections: Table and Details View. The pharmacy phone number is available in a tool tip when hovering over the Pharmacy column.

Dispensed Date	Generic Name	Brand Name	Strength	Form	Quantity	Est. Days Supply	Pharmacy	Prescriber
08 Jun 2020	QUININE SULFATE	Novo-Quinine	0.625mg/g	GRAN 2G PK	10	1	RETAIL PHARMACY - CO (CLARK'S) LAMONT, ONTARIO	LAMONT, WILLIAM EARLE
08 Jun 2020	OXYCODONE HCL	Co Oxycodone CR	20mcg & 100mcg	INJ SOL	16	7	RETAIL PHARMACY - CO (CLARK'S) LAMONT, ONTARIO	LAMONT, WILLIAM EARLE
08 Jun 2020	OXYCODONE HCL	Co Oxycodone CR	100mcg	INJ-10ML PK	18	9	RETAIL PHARMACY - CO (CLARK'S) LAMONT, ONTARIO	LAMONT, WILLIAM EARLE
08 Jun 2020	OXYCODONE HCL	Co Oxycodone CR	25mcg/hr	INSERT	34	25	RETAIL PHARMACY - CO (CLARK'S) LAMONT, ONTARIO	LAMONT, WILLIAM EARLE
08 Jun 2020	QUININE SULFATE	Novo-Quinine	0.8mg/mL & 1mg/mL	INJ PD-VIAL PK	18	9	RETAIL PHARMACY - CO (CLARK'S) LAMONT, ONTARIO	LAMONT, WILLIAM EARLE
08 Jun 2020	OXYCODONE HCL	Co Oxycodone CR	100U/mL	INJ PD-10MG PK	19	10	RETAIL PHARMACY - CO (CLARK'S) LAMONT, ONTARIO	LAMONT, WILLIAM EARLE
08 Jun 2020	QUININE SULFATE	Novo-Quinine	0.625mg/g	INJ	17	8	RETAIL PHARMACY - CO (CLARK'S) LAMONT, ONTARIO	LAMONT, WILLIAM EARLE
08 Jun 2020	QUININE SULFATE	Novo-Quinine	100U/mL	INJ PD-VIAL PK	15	6	RETAIL PHARMACY - CO (CLARK'S) LAMONT, ONTARIO	LAMONT, WILLIAM EARLE
08 Jun 2020	QUININE SULFATE	Novo-Quinine	0.8mg/mL & 1mg/mL	INJ PD-10MG PK	30	21	RETAIL PHARMACY - CO (CLARK'S) LAMONT, ONTARIO	LAMONT, WILLIAM EARLE
08 Jun 2020	QUININE SULFATE	Novo-Quinine	100U/mL	INJ PD-10MG PK	27	18	RETAIL PHARMACY - CO (CLARK'S) LAMONT, ONTARIO	LAMONT, WILLIAM EARLE
08 Jun 2020	OXYCODONE HCL	Co Oxycodone CR	0.625mg/g	INJ	23	14	RETAIL PHARMACY - CO (CLARK'S) LAMONT, ONTARIO	LAMONT, WILLIAM EARLE
08 Jun 2020	QUININE SULFATE	Novo-Quinine	100mcg	INJ SOL	16	7	RETAIL PHARMACY - CO (CLARK'S) LAMONT, ONTARIO	LAMONT, WILLIAM EARLE

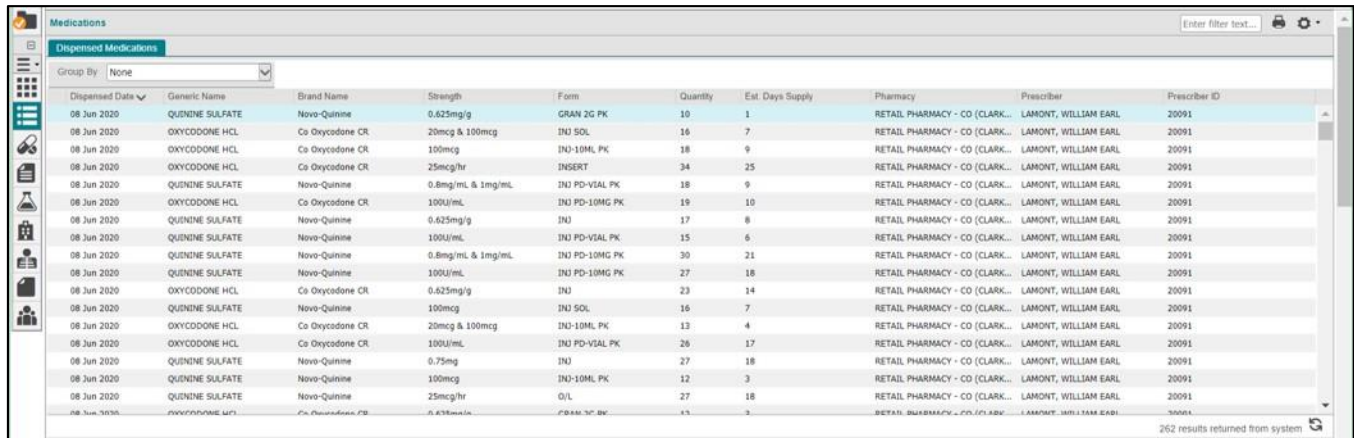
Medications Portlet – Full View

Dispensed Date	Form	Quantity	Dose/Strength	Therapeutic Class	Medical Condition/Reason for use	Prescriber	Pharmacy
08 Jun 2020	GRAN 2G PK	10	0.625mg/g	ANTI-INFECTIVE	PLASMODICIDES (ANTIMALARIALS)	LAMONT, WILLIAM EARLE	RETAIL PHARMACY - CO (CLARK'S)
						416-383-5655	416-968-2938
						20091	
						Ontario, Canada CPSO License Number	
						Pharmacist	
						SIMON BURKE, CATHERINE	

Medications Portlet – Details View

## Table

By default, most available columns of information display in the Table section. Refer to the table [Medications Data Elements](#) for columns that display and optional columns that can be [displayed](#) temporarily or permanently.



The screenshot shows a web application window titled "Medications" with a sub-section "Dispensed Medications". The table below lists various medications dispensed on 08 Jun 2020. The columns include Dispersed Date, Generic Name, Brand Name, Strength, Form, Quantity, Est. Days Supply, Pharmacy, Prescriber, and Prescriber ID. The data is filtered by "None".

Dispersed Date	Generic Name	Brand Name	Strength	Form	Quantity	Est. Days Supply	Pharmacy	Prescriber	Prescriber ID
08 Jun 2020	QUININE SULFATE	Novo-Quinine	0.625mg/g	GRAN 2G PK	10	1	RETAIL PHARMACY - CD (CLARK...	LAMONT, WILLIAM EARL	20091
08 Jun 2020	OXYCODONE HCL	Co Oxycodone CR	20mcg & 100mcg	INH SOL	16	7	RETAIL PHARMACY - CD (CLARK...	LAMONT, WILLIAM EARL	20091
08 Jun 2020	OXYCODONE HCL	Co Oxycodone CR	100mcg	INH-10ML PK	18	9	RETAIL PHARMACY - CD (CLARK...	LAMONT, WILLIAM EARL	20091
08 Jun 2020	OXYCODONE HCL	Co Oxycodone CR	25mcg/hr	INSERT	34	25	RETAIL PHARMACY - CD (CLARK...	LAMONT, WILLIAM EARL	20091
08 Jun 2020	QUININE SULFATE	Novo-Quinine	0.8mg/ml & 1mg/ml	INH PD-VIAL PK	18	9	RETAIL PHARMACY - CD (CLARK...	LAMONT, WILLIAM EARL	20091
08 Jun 2020	OXYCODONE HCL	Co Oxycodone CR	100U/mL	INH PD-10MG PK	19	10	RETAIL PHARMACY - CD (CLARK...	LAMONT, WILLIAM EARL	20091
08 Jun 2020	QUININE SULFATE	Novo-Quinine	0.625mg/g	INH	17	8	RETAIL PHARMACY - CD (CLARK...	LAMONT, WILLIAM EARL	20091
08 Jun 2020	QUININE SULFATE	Novo-Quinine	100U/mL	INH PD-VIAL PK	15	6	RETAIL PHARMACY - CD (CLARK...	LAMONT, WILLIAM EARL	20091
08 Jun 2020	QUININE SULFATE	Novo-Quinine	0.8mg/ml & 1mg/ml	INH PD-10MG PK	30	21	RETAIL PHARMACY - CD (CLARK...	LAMONT, WILLIAM EARL	20091
08 Jun 2020	QUININE SULFATE	Novo-Quinine	100U/mL	INH PD-10MG PK	27	18	RETAIL PHARMACY - CD (CLARK...	LAMONT, WILLIAM EARL	20091
08 Jun 2020	OXYCODONE HCL	Co Oxycodone CR	0.625mg/g	INH	23	14	RETAIL PHARMACY - CD (CLARK...	LAMONT, WILLIAM EARL	20091
08 Jun 2020	QUININE SULFATE	Novo-Quinine	100mcg	INH SOL	16	7	RETAIL PHARMACY - CD (CLARK...	LAMONT, WILLIAM EARL	20091
08 Jun 2020	OXYCODONE HCL	Co Oxycodone CR	20mcg & 100mcg	INH-10ML PK	13	4	RETAIL PHARMACY - CD (CLARK...	LAMONT, WILLIAM EARL	20091
08 Jun 2020	OXYCODONE HCL	Co Oxycodone CR	100U/mL	INH PD-VIAL PK	26	17	RETAIL PHARMACY - CD (CLARK...	LAMONT, WILLIAM EARL	20091
08 Jun 2020	QUININE SULFATE	Novo-Quinine	0.75mg	INH	27	18	RETAIL PHARMACY - CD (CLARK...	LAMONT, WILLIAM EARL	20091
08 Jun 2020	QUININE SULFATE	Novo-Quinine	100mcg	INH-10ML PK	12	3	RETAIL PHARMACY - CD (CLARK...	LAMONT, WILLIAM EARL	20091
08 Jun 2020	QUININE SULFATE	Novo-Quinine	25mcg/hr	O/L	27	18	RETAIL PHARMACY - CD (CLARK...	LAMONT, WILLIAM EARL	20091
08 Jun 2020	OXYCODONE HCL	Co Oxycodone CR	0.625mg/g	INH	13	3	RETAIL PHARMACY - CD (CLARK...	LAMONT, WILLIAM EARL	20091

### Medications Portlet – Full View

## Details View

Details View is the section below the table that displays additional detail about the patient's medications. Not all details display to enhance usability.

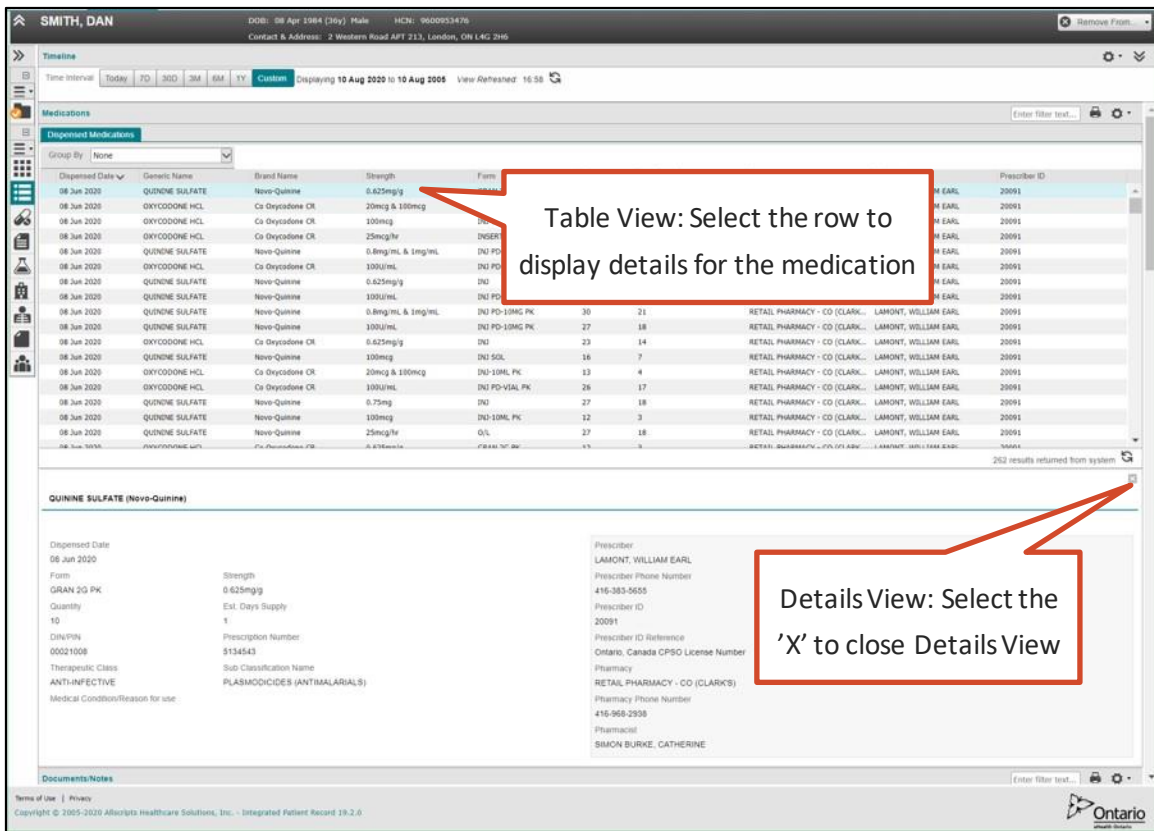
*Note:* for medication names that are too long to fit within a column, an ellipsis (...) appears in the column to indicate that there is additional information.

To display Details View:

1. Select the medication (any row in the list)
2. Details View appears below the list to provide additional information about the selected medication

*Tip:* Once Details View is displayed, select the 'X' in the upper right corner to close it.





## Individual Portlet Page, Table and Details Views

### Information Available in Each View

The available information columns in each view are detailed below. An asterisk '\*' indicates which ones are displayed by default and locked. An 'A' indicates available columns that can be added temporarily or permanently.

Column	Summary View – Condensed Portlet	Summary List and Individual Portlet View	Details View	Description
Dispensed Date	✓*	✓*	✓*	Transaction date when the prescription drug was dispensed or the pharmacy service was rendered; it does not indicate if the medication was picked up
Generic Name	✓*	✓*	✓*	Non-proprietary or generic name of the drug dispensed (e.g. diclofenac sodium). For pharmacy services, this field contains the

description of the pharmacy service rendered by a pharmacist (e.g., medication review for diabetes follow-up)

Brand Name	✓*	✓*	✓*	Brand name or trade name of the prescription drug dispensed (e.g., Voltaren). For pharmacy services, this field contains the pharmacy service type (e.g., MedsCheck)
Strength	✓*	✓*	✓*	Strength of the prescription drug; amount of active ingredient in the prescription drug dispensed (e.g., 100mg); for topical and liquid medication it may be shown as a percentage or ratio
Form	✓*	✓*	✓*	The physical form of a dose of a drug product (e.g., suppository)
Quantity	✓*	✓*	✓*	Quantity of medication dispensed; may be the number of items dispensed, or, for topical and liquid medication (e.g., Methadone) it may refer to dose, total volume or volume of drug concentrate
Est. Days Supply	A	✓*	✓*	Estimated days of treatment based on the directions for use on the prescription and/or the pharmacist's judgment on usage; estimating usage accurately may not be possible for some prescriptions (e.g., PRN)
DIN/PIN			✓*	<p>Drug Identification Number (DIN) assigned by Health Canada to every drug (e.g. Voltaren – DIN 00514012).</p> <p>Product Identification Number (PIN) assigned by the Ministry of Health to every pharmacy service (e.g. MedsCheck – PIN 93899981) and some drugs.</p>

Prescription Number			✓*	Number assigned by the pharmacy that appears on the label of the dispensed prescription	
Prescriber	A		✓*	✓*	Name of the prescriber that provided the prescription or ordered the pharmacy service
Prescriber ID	A		✓*	✓*	Identification number of prescriber of medication, supplies or professional service issued by their licensing college
Prescriber Phone Number	A (as a tool tip)		✓* (as a tool tip)	✓*	Phone number of the prescriber that provided the prescription or ordered the pharmacy service
Prescriber ID Reference				✓*	The Prescriber ID Reference is used in conjunction with the Prescriber ID; it identifies the registration authority (e.g., college) that provided the identification number
Pharmacy	A		✓*	✓*	Name of the pharmacy that dispensed the prescription or rendered the pharmacy service
Pharmacy Phone Number	A (as a tool tip)		✓* (as a tool tip)	✓*	Phone number of the pharmacy that dispensed the prescription or rendered the pharmacy service
Pharmacist				✓*	Name of the pharmacist or dispensing physician that dispensed the prescription or rendered the pharmacy service
Therapeutic Class	A	A		✓*	Pharmacologic therapeutic classification of the prescription drug dispensed (e.g., analgesics nonsteroidal)

Sub Classification Name	A	A	✓*	Pharmacologic therapeutic sub-classification of the prescription drug dispensed. (e.g., anti-inflammatory agent)
Medical Condition/Reason for use			✓*	Indicates prescriber's designation of the medical condition for which the patient is being treated. This data field is only available for Limited Use products (e.g., Acarbose, Aflibercept)

### Medications Data Elements

## Preferences

By default, all views of the Medications portlet display a locked subset of available columns. You can set preferences for the Table section of each view using one of two methods:


A. Temporarily adjust preferences directly on the list view:

- Adjust the width of any column ([Column Width](#))
- Display/hide any of the columns from the display ([Hide or Show Columns](#)). Locked columns cannot be hidden
- Sort the list by any column in ascending or descending order ([Sorting](#))
- Filter the list by any column ([Filtering](#))

*Note:* These preferences are not saved after navigating away from the portlet.

B. To permanently personalize the list, select 'User Preferences' 

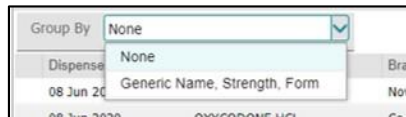
- Change which columns display ([Hide or Show Columns](#))
- Change the order in which the columns display ([Change the Order of Displayed Columns](#))
- Select which column should be used as the default sort ([Change the Default Sort Column and Sort Order](#))
- Reset to system defaults ([Reset Preferences to System Defaults](#))

*Note:* To print the list of medications and pharmacy services, select Print  ([Printing from List Views](#)). Printing is only available for the full list view of the Medications portlet. You cannot print Details View or condensed views.


## Grouping

You can choose to group the display of dispensed medications using a drop-down list in the portlet. The following options are available:

1. None (default display) – dispensed medications are not grouped
2. Generic Name, Strength, Form – dispensed medications with the same generic name, strength and form are grouped together



### Grouping Options

- All groups are collapsed by default. Use the expand/collapse all  controls to expand and collapse all groups simultaneously.
- Column-level sorting works while the portlet is grouped, the sorting applies to the results *within* each group. In other words, results are re-ordered within each group.
- Filtering works while the portlet is grouped, you can filter on any column that has filtering enabled.
- Grouping persists when you filter and sort the portlet.
- Grouping does not persist when you switch between views, patients or time intervals. Grouping also does not persist between sessions.

### Group by Generic Name, Strength, Form

Grouping by 'Generic Name, Strength, Form' groups all dispensed medications with identical values for these attributes. Each group header displays these values combined together, e.g. 'LEVONORGESTREL 52 mg INSERT' along with the total number of times this combination was dispensed in parentheses, e.g. '(Claims: 6)'. The rest of the information in the group header applies to the most recently dispensed item from the group.

If you had sorted the data prior to grouping, the sort order within the groups will be preserved. However, the groups are always sorted with the most recently dispensed item at the top, regardless of the defined sort order.

Medications Enter filter text...

Dispensed Medications

Group By: Generic Name, Strength, Form

Limited to drug information and pharmacy services available in DHDR.

Dispensed Date	Generic Name	Brand Name	Strength	Form	Quantity	Est. Days S...	Pharmacy	Prescriber	Prescriber ID
MEDICATION REVIEW HOME (Claims: 1) Brand: Meds Check Qty: 30 Est. Days Supply: 30 Pharmacy: JOHN'S LTD Last Dispensed: 10 Mar 2016									
DROSPIRENONE & ETHINYL ESTRADIOL 3.0mg & 0.03mg TAB-2B PK (Claims: 6) Brand: Yasmin 28 Qty: 27 Est. Days Supply: 18 Pharmacy: RETAIL PHARMACY - CO (CLARK'S) 416-968-2938 Last Dispensed: 04 Mar 2016									
ETHINYL ESTRADIOL & NORELGESTROMIN 6.0mg & 0.6mg TRANSDERM SYST-PK (Claims: 6) Brand: Evra Qty: 18 Est. Days Supply: 9 Pharmacy: RETAIL PHARMACY - CO (CLARK'S) 416-968-2938 Last Dispensed: 03 Mar 2016									
MEDICATION REVIEW (LONG TERM CARE) QUARTERLY (Claims: 1) Brand: Meds Check Qty: 30 Est. Days Supply: 30 Pharmacy: JOHN'S LTD Last Dispensed: 03 Mar 2016									
LEVONORGESTREL 52mg INSERT (Claims: 6) Brand: Mirena Qty: 17 Est. Days Supply: 8 Pharmacy: RETAIL PHARMACY - CO (CLARK'S) 416-968-2938 Last Dispensed: 02 Mar 2016									
02 Mar 2016	LEVONORGESTREL	Mirena	52mg	INSERT	17	8	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	44434827
19 Feb 2016	LEVONORGESTREL	Mirena	52mg	INSERT	17	8	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	44434827
09 Feb 2016	LEVONORGESTREL	Mirena	52mg	INSERT	17	8	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	44434827
28 Jan 2016	LEVONORGESTREL	Mirena	52mg	INSERT	17	8	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	44434827
18 Jan 2016	LEVONORGESTREL	Mirena	52mg	INSERT	17	8	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	44434827
08 Jan 2016	LEVONORGESTREL	Mirena	52mg	INSERT	17	8	RETAIL PHARMACY - CO (CLARK...	LAMONT, WILLIAM EARL	44434827
LEVONORGESTREL 0.75mg TAB-2 TABS PK (Claims: 12) Brand: Next Choice Qty: 16 Est. Days Supply: 7 Pharmacy: RETAIL PHARMACY - CO (CLARK'S) 416-968-2938 Last Dispensed: 01 Mar 2016									
MEDICATION REVIEW (LONG TERM CARE) (Claims: 1) Brand: Meds Check Qty: 30 Est. Days Supply: 30 Pharmacy: JOHN'S LTD Last Dispensed: 28 Feb 2016									

262 results returned from system

### Group by Generic Name, Strength, Form

*Note:* To return to the default view, select the 'None' Group By option.

## Documents/Notes Portlet

The Documents/Notes portlet includes all non-diagnostic notes and reports such as Consult Notes, Discharge Summaries, History and Physicals, etc.

*Note:* The largest file that can be sent to the ClinicalViewer is 7MB. Files larger than 7MB are divided into smaller files by organizations before sending to ConnectingOntario. Organizations may name the files Part 1 and Part 2 to indicate the relationship of the files; however, this may not always be the case.

Document Date/Time	Document	Description	Status	Authored By	Organization	Admit Date/Time	Discharge Date/Time	Visit/Encounter ID
29 Jan 2020 13:30		Safety Issues	Final	Hamilton, Ashlyn	Toronto Central LHIN	25 Jan 2020 00:00	25 Jan 2020 09:00	TCLCCAC-A101
28 Jan 2020 13:30		Safety Issues	Final	Hamilton, Ashlyn	Toronto Central LHIN	25 Jan 2020 00:00	25 Jan 2020 09:00	TCLCCAC-A101
27 Jan 2020 13:30		Safety Issues	Final	Hamilton, Ashlyn	Mississauga Halton LHIN	27 Jan 2020 08:00	27 Jan 2020 09:00	AVCCAC-A108
27 Jan 2020 13:30		Safety Issues	Final	Hamilton, Ashlyn	Mississauga Halton LHIN	24 Jan 2020 08:00	24 Jan 2020 09:00	AVCCAC-A101
27 Jan 2020 13:30		Safety Issues	Final	Hamilton, Ashlyn	Toronto Central LHIN	25 Jan 2020 00:00	25 Jan 2020 09:00	TCLCCAC-A101
27 Jan 2020 08:30		Client Risks	Final	Hamilton, Ashlyn	Mississauga Halton LHIN	27 Jan 2020 08:00	27 Jan 2020 09:00	AVCCAC-A107
25 Jan 2020 13:30		Safety Issues	Final	Hamilton, Ashlyn	Toronto Central LHIN	25 Jan 2020 00:00	25 Jan 2020 09:00	TCLCCAC-A101
24 Jan 2020 08:30		Safety Issues	Final	Hamilton, Ashlyn	Mississauga Halton LHIN	24 Jan 2020 08:00	24 Jan 2020 09:00	AVCCAC-A101
24 Jan 2020 08:30		Safety Issues	Final	Hamilton, Ashlyn	Mississauga Halton LHIN	24 Jan 2020 08:00	24 Jan 2020 09:00	AVCCAC-A105
24 Jan 2020 08:30		Safety Issues	Final	Hamilton, Ashlyn	Mississauga Halton LHIN	24 Jan 2020 08:00	24 Jan 2020 09:00	AVCCAC-A101
24 Jan 2020 08:30		Safety Issues	Final	Hamilton, Ashlyn	Mississauga Halton LHIN	24 Jan 2020 08:00	24 Jan 2020 09:00	AVCCAC-A101
24 Jan 2020 08:30		Safety Issues	Final	Hamilton, Ashlyn	Mississauga Halton LHIN	24 Jan 2020 08:00	24 Jan 2020 09:00	AVCCAC-A102
20 Jun 2019 17:59		Procedure Note	Final	Othis, Moody Zorita II	THP - Mississauga Hospital	20 Jun 2019 11:43		DanvisJU20
05 Jun 2017 00:00		NLC31_General Medicine Discharge ...	Final	Othis, Moody Zorita II	North York General Hospital	05 Jun 2017 17:17	06 Jun 2017 17:17	QAINYGH0ANS1002
03 Jun 2017 00:00		NLC21_Critical Care Progress Note	Final	Othis, Moody Zorita II	North York General Hospital	03 Jun 2017 17:17	04 Jun 2017 17:17	QAINYGH0ANS1001

## Documents/Notes Portlet – Summary List and Individual Portlet View

### Information Available in Each View

The available columns in each view are detailed below. By default, the full-size Documents/Notes portlet shows all available columns. A checkmark ✓ indicates the columns displayed by default in the view(s). Available columns that can be added temporarily or permanently are indicated by an 'A':

Column	Summary View – (Condensed Size)	Summary List & Individual Portlet View (Full Size)	Description
Document Date / Time	✓	✓	The date and time of the document or note. <i>* Default sort using this column</i>
Attachments (no label)	✓	✓	The attachment icon appears when documents are available for viewing.  Select View with the row selected or select directly on the attachment icon to open the Document Viewer with the document of interest displayed ( <a href="#">Viewing Documents</a> ).
Description	✓	✓	The description (title) of the document/note.

Column	Summary View – (Condensed Size)	Summary List & Individual Portlet View (Full Size)	Description
Status	A	✓	<p>Indicates the status of the document or note (e.g., preliminary, final, etc.). Amended status appears in <b>bold red</b>.</p> <p>Only the most recent status of a document displays in the portlet.</p> <p>For a document/note with a status of ‘Withdrawn’, row detail appears but no attachment is available. If the attachment is required, contact the originating organization.</p>
Authored By	A	✓	The provider who dictated or documented the note or report.
Organization	A	✓	The facility or organization where the document or note was created. Select the link to see additional information.
Admit Date / Time	A	✓	The admission date for the encounter associated with the note or report.
Discharge Date / Time	A	✓	The discharge date for the encounter associated with the note or report.
Encounter / Visit ID	A	✓	<p>The visit or encounter number that the note or report is associated with.</p> <p><i>Note:</i> This is a system number that can be used for cross-referencing with the Documents/Notes portlet.</p>

### Documents/Notes Data Elements




## Preferences

You can set the Table preferences in each view using one of two methods:


A. Temporarily adjust preferences directly on the list.

- Adjust the width of any column ([Column Width](#))
- Change which columns display ([Hide or Show Columns](#))
- Sort the list by any column in ascending or descending order ([Sorting](#))
- Filter the list by any column, with the exception of Attachments ([Filtering](#))

*Note:* These preferences are not saved after navigating away from the portlet.

B. To permanently customize the list, select User Preferences 

- Change the columns that display ([Hide or Display Columns](#))
- Change the order in which the columns display ([Change the Order of Displayed Columns](#))
- Select which column should be used as the default sort ([Change the Default Sort Column and Sort Order](#))
- Reset to System Defaults ([Reset Preferences to System Defaults](#))

*Note:* To print the table list of Documents/Notes for the selected time interval, select Print  ([Printing from List Views](#)).

## Lab and Pathology Results Portlet

### Introduction to OLIS

Ontario Laboratories Information Systems (OLIS) is a provincial system that allows laboratory information on patients from Ontario to be stored and retrieved electronically between practitioners and laboratory service providers. Both private and acute organizations have been submitting data to OLIS since January 2006 and this data continues to grow as new laboratories come onboard. The ClinicalViewer's Lab and Pathology Results portlet provides view-only access to data currently available in OLIS. This portlet is geared towards aiding clinical decision-making and is meant to be used in combination with the health care provider's existing access to their organization's health information systems. The portlet is designed to present data as it is submitted to OLIS by the reporting laboratories without alteration.

Important keywords:

- **Order and Report:** In OLIS, a laboratory order and laboratory report differ only in whether the results have been reported for the ordered tests, so the terms order and report are often used interchangeably

- **Order:** An order identifies a patient, an ordering practitioner, and a list of CC'd practitioners. The order's main purpose is to group one or more test requests ordered by the practitioner together
- **Report:** A report is a structured view of the results for an order. The report contains the test request reported by an authorized health care facility
- **Test Request:** In OLIS, the tests ordered by the practitioner are grouped into Test Requests (e.g. , a Sodium test is sometimes grouped as part of a test request called Electrolytes)
- **OLIS Matching Points:** The Ontario Health Card Number (HCN) is the primary patient identifier used by the ClinicalViewer to match patient results stored in OLIS. This may occasionally result in missing data from the ClinicalViewer as smaller labs may report results using their own local identifiers (instead of an HCN) or patients may only have federal health identifications (e.g. military personnel).

The Lab and Pathology Results portlet displays lab results returned from the Ontario Laboratories Information System (OLIS) in seven views.

1. Summary View – condensed portlet
  - Quick view of available results
2. Summary List View – full-sized portlet
  - All default columns display in this view
3. Individual Portlet View – full-sized portlet
  - All default columns display in this view
4. Full Report View
  - The entire order shown as the reporting lab intended the order to be viewed. All results for the order display with all the available details
5. Attachment View
  - All the attachments for a particular result are displayed at a glance
6. Flowsheet View
  - Displays lab results in a tabular display over time, for a pre-determined set of panels and test results
7. Graphical View
  - Display results from the flowsheet as a bar or line graph to illustrate the trend of the patient's lab results

Details View of this portlet is available in Summary View, Summary List View and Individual Portlet View. Details View shows additional details below the Table View upon selecting a result. Not all details display to enhance usability.

Information from acute, community, private labs and public health are displayed in the ClinicalViewer.

Currently the portlet filters the returned OLIS lab results into nine tabs based on laboratory modalities or functionality:

- All – consolidated list of all available results
- Hematology
- Chemistry
- Blood Bank
- Pathology
- Microbiology
- Other – includes Immunology, Serology, Allergen and clinical results
- Flowsheet – aggregates a pre-determined set of panels and test results into a list view
- Graph – displays user-selected flowsheet results in a bar or line graph

Collection Date/Time	Last Updated	Order ID	Ordered As	Test	Flag	Result	Attachments	Reference Range	Units	Test Result Status	Specimen	OLIS Full Report	Source
17 Sep 2020 20:00	25 Sep 2020 13:04	cOIPharmacytest (The Sal...	2019 Novel Coronavirus PCR	2019 Novel Coronavirus R&Pp ge...		Detected				Final	Other		Other
17 Sep 2020 20:00	25 Sep 2020 13:04	cOIPharmacytest (The Sal...	2019 Novel Coronavirus PCR	SARS-related Coronavirus E Gen...		Detected				Final	Other		Other
17 Sep 2020 20:00	25 Sep 2020 13:04	cOIPharmacytest (The Sal...	2019 Novel Coronavirus PCR	COVID-19 Virus PCR Interpretation		COVID-19 virus DE...				Final	Other		Other
31 Dec 2017 00:00	12 Feb 2018 15:43	CV_0BR7_Test05 (OLIS La...	Microalbumin	Albumin; Urine		168			mg/L	Final	Urine		
31 Dec 2017 00:00	12 Feb 2018 15:43	CV_0BR7_Test05 (OLIS La...	Microalbumin	Creatinine; Urine		7.3		2.5-20.0	mmol/L	Final	Urine		
31 Dec 2017 00:00	12 Feb 2018 15:43	CV_0BR7_Test05 (OLIS La...	Microalbumin	Albumin/Creatinine Ratio; Urine	H	23.0		< 2.0	mg/mmol	Final	Urine		
15 Mar 2013 21:05	09 Jun 2015 10:18	CV04_002_03 (Toronto Ge...	WBC Manual Differential	Body Height; Measured		180		170-200	cm	Final	Whole blood		Site Modifier
15 Mar 2013 21:05	09 Jun 2015 10:18	CV04_002_03 (Toronto Ge...	WBC Manual Differential	Lymphocytes; Blood	L	0.1		1.00-4.00	x10 9/L	Final	Whole blood		Site Modifier
15 Mar 2013 21:05	09 Jun 2015 10:18	CV04_002_03 (Toronto Ge...	WBC Manual Differential	Monocytes; Blood		0.1		0.00-1.20	x10 9/L	Final	Whole blood		Site Modifier
15 Mar 2013 21:05	09 Jun 2015 10:18	CV04_002_03 (Toronto Ge...	WBC Manual Differential	Eosinophils; Blood		0.1		0.00-0.70	x10 9/L	Final	Whole blood		Site Modifier
15 Mar 2013 21:05	09 Jun 2015 10:18	CV04_002_03 (Toronto Ge...	WBC Manual Differential	Basophils; Blood	L	0.0		0.00-0.35	x10 9/L	Final	Whole blood		Site Modifier
15 Mar 2013 21:05	09 Jun 2015 10:18	CV04_002_03 (Toronto Ge...	WBC Manual Differential	Neutrophils Segmented; Blood	LL	0.2		2.00-7.50	x10 9/L	Final	Whole blood		Site Modifier
15 Mar 2013 21:05	09 Jun 2015 10:18	CV04_002_03 (Toronto Ge...	WBC Manual Differential	Band Neutrophils; Blood		0.1		0.00-0.60	x10 9/L	Final	Whole blood		Site Modifier
15 Mar 2013 21:05	09 Jun 2015 10:18	CV04_002_03 (Toronto Ge...	WBC Manual Differential	Metamyelocytes; Blood		<0.1		0-0.2	x10 9/L	Final	Whole blood		Site Modifier
15 Mar 2013 21:05	09 Jun 2015 10:18	CV04_002_03 (Toronto Ge...	WBC Manual Differential	Myelocytes; Blood	H	<0.1		0-0	x10 9/L	Final	Whole blood		Site Modifier

### Lab and Pathology Results Portlet

The look and feel of the Lab and Pathology portlet is similar to the other portlets in the ClinicalViewer. However, the following functionalities may differ slightly from the other portlets:

- Filtering
- Sorting
- Printing
- Consent Override
- Table and Details View
- Hovering over full text results and links
- Timeline

## Consent Directive

Under PHIPA, patients have the right to refuse or restrict access with regard to the collection, use and distribution of their PHI.

A patient's OLIS data remains accessible to authorized health information custodians, and their agents, until a consent directive is applied to the patient's OLIS data. OLIS gives patients or their substitute decision maker(s) the option to restrict access to their lab data in OLIS at either:

- The patient level (domain) – restricts access to all of their laboratory test results in OLIS, or
- The test level – restricts access to a particular test (specified at the time the test is conducted)

Restricting access at either the patient or test level means only the following are allowed to see the information:

- The health care providers named on the lab requisition (e.g., the ordering or copied provider)
- The reporting lab, the lab that performed the test, and the organization that placed the test request

If a patient restricts access to their results in OLIS, other health care providers involved in the patient's care cannot access any patient information that has been, or will be, submitted into OLIS. A warning message appears in the portlet to alert users.

Refer to [Overriding Consent](#) for details.

## Overriding Consent

In special cases, the patient directive restricting access to OLIS information can be overridden by a provider. A health care provider must obtain the express consent of the patient or their substitute decision maker (SDM) to override a directive restricting access. When a consent override is in place, OLIS data access is available temporarily for 4 hours.

It is recommended that the provider clarify for the patient that although the consent override is temporary in respect to OLIS, the information that the patient has allowed the provider to view may be available to other providers involved in the patient's care.

The Ministry of Health, as the health information custodian of OLIS, does not permit authorized users who access OLIS to override a consent directive applied to OLIS data without the patient's (or their SDM's) express consent. Therefore, users must not perform the consent override on OLIS data without obtaining express consent from the patient or their SDM, even for reasons of clinical emergency. Consequently, risk of harm cannot be chosen to unblock OLIS information.

*Note:* All consent directive overrides are monitored by the Privacy Officer for auditing purposes.

## Summary View – Condensed Portlet

You can view relevant patient information at a glance in the condensed view of the Lab and Pathology Results portlet. All lab and pathology results with a specimen collection date and time that fall within the selected timeline interval are available in the portlet. In order to support an ‘at a glance’ view, the following key information fields display by default in this view:

- Collection Date/Time
- Last Updated (date and time)
- Ordered As
- Test (test result name)
- Flag

*Note:* the Full Report, Flowsheet and Graphical views are not accessible in this view.

Collection Date/Time	Last Updated	Ordered As	Test
31 Dec 2017 00:00	12 Feb 2018 15:43	Microalbumin	Albumin; Urine
31 Dec 2017 00:00	12 Feb 2018 15:43	Microalbumin	Creatinine; Urine
31 Dec 2017 00:00	12 Feb 2018 15:43	Microalbumin	Albumin/Creatinine R2
15 Mar 2013 21:05	09 Jun 2015 10:18	WBC Manual Dif...	Body Height; Measure
15 Mar 2013 21:05	09 Jun 2015 10:18	WBC Manual Dif...	Lymphocytes; Blood
15 Mar 2013 21:05	09 Jun 2015 10:18	WBC Manual Dif...	Monocytes; Blood
15 Mar 2013 21:05	09 Jun 2015 10:18	WBC Manual Dif...	Eosinophils; Blood

### Condensed Lab and Pathology Results Portlet – Summary View

*Note:* If any result within an order has a collection date/time within the selected time range, then all results for the order are displayed in the Summary View.

## Details View

Details View is the section below Table View that displays additional detail about the patient lab results including:

1. The result value and attributes important to interpreting the result (e.g., result value, reference range)
2. Additional attributes about the result (comments, nature of abnormality, etc.)
3. Order level attributes with relation to the result (reporting organization, test request status, etc.)

To display Details View:

1. Select the result (any row in the list)
2. Details View displays below the list to provide additional information about the result that was selected

*Note:* Once Details View is open, select the 'X' in the upper right corner to close it.

The information displayed in Details View is split into two sections: result level and order level.

**Result level details**

Result	Flag	Reference Range	Unit
Detected	—		—
Specimen	Source		
Other	Other		

Reports/Images  
No Other Attachments available  
Comments

**Test Request Comments:**  
Note: This real-time PCR assay has been validated at Public Health Ontario Laboratories and the National Microbiology Laboratory for clinical use. It has not been cleared or approved by Health Canada. This test includes two targets: RNA dependent RNA polymerase (RdRp) gene and Envelope gene (E). Detection of two gene targets is required for laboratory confirmation of COVID-19 (2019 novel coronavirus disease) virus by real-time PCR. Results should be interpreted in the context of the clinical history and other pathological findings.  
Test results are uninterpretable due to the failed amplification of the extraction control. Unable to report COVID-19 (2019 novel coronavirus disease) virus PCR result. Amplification failure may be due to inadequate specimen content, extraction failure, or PCR inhibition. Please resubmit another specimen for testing.  
Copy of results sent to MOH.  
Testing performed at Public Health Laboratory - Hamilton

**Order level details**

- Test Result Status: Final
- Test Request Status: Final
- Order ID: cONPharmacytest (The Salvation Army Grace Hospital)
- Collection Date/Time: 17 Sep 2020 20:00
- Last Updated Date/Time: 25 Sep 2020 13:04
- Ordering Physician: Ferid Rashid
- Reporting Organization: The Salvation Army Grace Hospital
- Performing Organization: The Salvation Army Grace Hospital

### Lab and Pathology Results Portlet – Details View

Result level details are as follows:

Data Field	Description
Test	The test result name, test request name, and a warning indicator if the result is abnormal
Result	Test result detail – numerical value or text
Flag	Flag provided with the result ( <a href="#">Flags</a> )
Reference Range	Reference Range (normal range) for the test and the nature of the abnormal result (if applicable)

<b>Data Field</b>	<b>Description</b>
Units	Unit of measure for the result value
Specimen	The source of the specimen
Source	Procedure source  <i>Note:</i> this field does not display by default, but can be added to the View at the user's discretion.
Reports/Images	Attachment link appears when attachments are available for the result (excluding the OLIS Full Report). Selecting the link opens the Document Viewer and displays the document.
Test Result Comments	Comments associated with the test result, including ancillary comments
Test Request Comments	Comments associated with the test request, including Collector's comments
Order Comments	Comments associated with the order

#### **Lab and Pathology Results Data Elements, Result Detail View**

Order level details are as follows:

<b>Data Field</b>	<b>Description</b>
Test Result Status	Status of test result  <i>Note:</i> Test results with a status of 'Invalid' have strikethrough applied to the result, reference range, and units values in Details View
Test Request Status	Status of test request

Order ID	The lab order ID followed by the name of the lab in parentheses.
Collection Date/Time	Date and time of collection
Last Updated	Date and time the result was last updated
Ordering Physician	Physician who placed the order
Reporting Organization	Organization where the order was initiated
Performing Organization	Organization where the test was performed

**Lab and Pathology Results Data Elements, Order Details View**

## Summary List View and Individual Portlet View

The full portlet view displays in the Summary List View, the Individual Portlet View and the Expanded Summary View. All lab and pathology results with a specimen collection date and time that fall within the selected timeline interval display in two sections: Table View and Details View.

The large amount of detail available in the full portlet view is categorized into three groups:

1. The result value and attributes important to interpreting the result (e.g., result value, reference range)
2. Additional attributes about the result (comments, nature of abnormality, etc.)
3. Order level attributes with relation to the result (reporting organization, test request status, etc.)

The first group displays in Table View and Details View. The last two display in Details View only.

### Table View

Summary List View provides additional columns not available in Summary View – Condensed Portlet. The default setting is the “All” tab. All lab results with a Collection Date/Time that falls within the selected Timeline interval display. Results are sorted by Collection Date/Time and the OLIS sort keys.

Each tab in the Lab and Pathology portlet has a default configuration of visible columns that varies based on the appropriateness of that field for that tab/modality. For example, the Pathology tab does not display a reference range or units by default as pathology results are generally available as a report and not as a standard discrete or numerical result. You can add additional columns to the view for each modality but cannot remove locked default columns. The columns available for display in any of the tabs are listed in the table below.



Notes:

- If the result has been updated, the most recent result always displays
- If any result within an order has a collection date/time within the selected time range, then all results for the order display in Table View

Column	Description
Collection Date/Time	Date and time of collection. This column is mandatory for all modalities <i>* Default sort is performed on this column</i>
Last Updated	Date and time the result was last updated. This column is mandatory for all modalities
Order ID	The lab order ID followed by the name of the lab in parentheses.
Ordered As	Test Request name or Panel name that is associated with the test result. This column is mandatory for all modalities
Test	Test result name. This column is mandatory for all modalities
Flag	Flag provided with the result ( <a href="#">Flags</a> )
Result	Test result detail – numerical value or text. This column is mandatory for all modalities
Attachments	An icon displays in this column if one or more attachments are associated with the result  Select View with the row selected or select the Attachment icon to open the Document Viewer with the document of interest displayed ( <a href="#">Viewing Documents</a> )
Reference Range	Reference range (normal range) for the test as per the lab where the test was completed
Units	Unit of measure for the result value. This may differ across labs for the same test type
Test Result Status	Status of the test result. This column is mandatory for all modalities

Column	Description
	<i>Note:</i> Test results with a status of 'Invalid' have strikethrough applied to the result, reference range, and units values in the table
Specimen	The source of the specimen
Source	Procedure source  <i>Note:</i> this field does not display by default, but it can be added to the view at the user's discretion
OLIS Full Report	An OLIS Full Report is available for every lab result. The user can open the report by selecting the attachment icon in the column. Note that the report includes results for all test requests within the order. This column is mandatory for all modalities.  <i>Note:</i> this column is available in the Summary List or Individual Portlet Views only
Default Sort Key	Displays the logic used to apply the portlet default sort (using OLIS sort keys)  <i>Note:</i> this column should not be added to Table View

**Lab and Pathology Results Data Elements, Table View**

## Details View

Details View is the section below table view that displays additional detail about the patient lab results.

1. The result value and attributes important to interpreting the result (e.g., result value, reference range)
2. Additional attributes about the result (comments, nature of abnormality, etc.)
3. Order level attributes related to the result (reporting organization, test request status, etc.)

To display Details View:

1. Select the result (any row in the list)
2. Details View displays below Table View to provide additional information about the selected result

*Note:* Once Details View is open, select the 'X' in the upper right corner to close it

The screenshot displays the patient record for SMITH, DAN (DOB: 08 Apr 1984, HCN: 9600953476). The timeline shows lab results from 17 Sep 2021 to 01 Sep 2000. A table of results is shown, with the following data:

Time Interval	Result	Order ID	Reporting Organization
17 Sep 2020 20:00	25 Sep 2020 13:04	cONPharmacytest (The Sal...)	2019 Novel Co...
17 Sep 2020 20:00	25 Sep 2020 13:04	cONPharmacytest (The Sal...)	2019 Novel Coronavirus PCR SARS-related Coronavirus E Gen... Detected
17 Sep 2020 20:00	25 Sep 2020 13:04	cONPharmacytest (The Sal...)	2019 Novel Coronavirus PCR COVID-19 Virus PCR Interpretation COVID-19 virus DE...

143 results returned from system

The details view for the selected result shows:

- Test: COVID-19 V
- Result: COVID-19 virus DE...
- Specimen: Source
- Other: Other
- Reports/Images: No Other Attachments available
- Comments: Test Request Comments: Note: This real-time PCR assay has been validated at Public Health Ontario Laboratories and Laboratory for clinical use. It has not been cleared or approved by Health Canada. This test dependent RNA polymerase (RdRp) gene and Envelope gene (E). Detection of two gene targets is

Callout boxes in the image provide the following instructions:

- Use the inside scroll bar to view additional reports
- Select the row to display additional details for the result
- Select the 'X' to close Details View
- Use the outside scroll bar to display Details View

### Individual Portlet View – Table and Details View

The information displayed in Details View is split into two sections: result level and order level.

Result level details

Order level details

**Test: 2019 Novel Coronavirus RdRp gene [2019 Novel Coronavirus PCR]**

Result	Flag	Reference Range	Unit
Detected	—		—
Specimen	Source		
Other	Other		

Reports/Images  
No Other Attachments available  
Comments

**Test Request Comments:**  
 Note: This real-time PCR assay has been validated at Public Health Ontario Laboratories and the National Microbiology Laboratory for clinical use. It has not been cleared or approved by Health Canada. This test includes two targets: RNA dependent RNA polymerase (RdRp) gene and Envelope gene (E). Detection of two gene targets is required for laboratory confirmation of COVID-19 (2019 novel coronavirus disease) virus by real-time PCR. Results should be interpreted in the context of the clinical history and other pathological findings.  
 Test results are uninterpretable due to the failed amplification of the extraction control. Unable to report COVID-19 (2019 novel coronavirus disease) virus PCR result. Amplification failure may be due to inadequate specimen content, extraction failure, or PCR inhibition. Please resubmit another specimen for testing.  
 Copy of results sent to MOH.  
 Testing performed at Public Health Laboratory - Hamilton

Test Result Status  
**Final**

Test Request Status  
**Final**

Order ID  
cONPharmacytest (The Salvation Army Grace Hospital)

Collection Date/Time  
17 Sep 2020 20:00

Last Updated Date/Time  
25 Sep 2020 13:04

Ordering Physician  
**Ferid Rashid**

Reporting Organization  
The Salvation Army Grace Hospital

Performing Organization  
The Salvation Army Grace Hospital

### Lab and Pathology Results Portlet – Details View

Result level details are the same as in the condensed portlet described above.

The Lab and Pathology Results portlet has several indicators for easy navigation; for example, status messages, consent warning messages, invalid or abnormal indicators.

*Note:* A record that is struck out indicates a cancelled lab order

## Test Result Comments

The icon indicates that test result comments are available for this result. Hover over the icon to see any Test Result comments associated with the result.

*Note:* Only Test Result Comments are available in the hover (not Order or Test Request comments).


Lab and Pathology Results									
Collection Date/Time	Last Updated	Order ID	Ordered As	Test	Flag	Result	Attachments	Reference Range	
17 Sep 2020 20:00	25 Sep 2020 13:04	cONPharmacytest (The Sal...	2019 Novel Coronavirus PCR	2019 Novel Coronavirus RdRp ge...		Detected			
17 Sep 2020 20:00	25 Sep 2020 13:04	cONPharmacytest (The Sal...	2019 Novel Coronavirus PCR	SARS-related Coronavirus E Gen...		Detected			
17 Sep 2020 20:00	25 Sep 2020 13:04	cONPharmacytest (The Sal...	2019 Novel Coronavirus PCR	COVID-19 Virus PCR Interpretation		COVID-19 virus DE...			
31 Dec 2017 00:00	12 Feb 2018 15:43	CV_OBR7_Test05 (OLIS La...	Microalbumin	Albumin; Urine		168			
31 Dec 2017 00:00	12 Feb 2018 15:43	CV_OBR7_Test05 (OLIS La...	Microalbumin	Creatinine; Urine		7.3		2.5-20.0	
31 Dec 2017 00:00	12 Feb 2018 15:43	CV_OBR7_Test05 (OLIS La...	Microalbumin	Albumin/Creatinine Ratio; Urine	<b>H</b>	<b>23.0</b>		< 2.0	

### Test Result Comment

*Note:* These comments are available in all tabs of the portlet, not just the Flowsheet tab.

## Flags

When a result is abnormal, both the result value and flag value display in red and bold on the table view and details view. The available OLIS flags are:

Flag	Description
	Indicates an abnormal result within a test request or grouping
<b>L</b>	Below low normal
<b>H</b>	Above high normal
<b>LL</b>	Below lower panic limits
<b>HH</b>	Above upper panic limits
<b>A</b>	Abnormal (applies to non-numeric results)
<b>AA</b>	Very abnormal (applies to non-numeric units, analogous to panic limits for numeric units)

### Lab and Pathology Results Data Elements, Flags

*Note:* When the value is abnormal, the accompanying nature of abnormality information displays beneath the reference range value in Details View.

Test: Body Weight; Measured [Electrocardiogram] 		
Result	Flag	Reference Range
<b>295</b>	<b>HH</b>	175-230 An age-based population
Specimen		
Catheter Tip, Angio		

### Nature of Abnormality

## Text Truncation

Result values in this portlet are truncated after 16 characters and are followed by an ellipse (“...”), e.g., “positive but true...”

Note: Hovering over the truncated text value in the Lab and Pathology Results portlet does not show the full text of the result. To view the full text, select the link in Details View.

1. Select the result with the truncated value to display Details View
2. Select the result value that is hyperlinked within Details View

The screenshot shows a table with columns: Collection Date/Time, Last Updated, Order ID, Ordered As, Test, Flag, Result, Attachments, Reference Range, Units, Test Result Status, Specimen, and OLIS Full Report. The row for 'COVID-19 Virus PCR Interpretation' has a truncated result 'COVID-19 virus DE...'. A red callout box labeled '1. Select the row with the truncated value' points to this row. Below the table, the details view for this test is shown, with a red callout box labeled '2. Select the hyperlink within Details View' pointing to the truncated result text 'COVID-19 virus DE...'.

**Lab and Pathology Results Portlet with Truncated Result**

3. The full text of the truncated result appears in a pop-up

The pop-up window has a title bar 'Result Value' and a close button. The main content area displays the text 'Indeterminate result. Further testing is required.' in red font.

**Full Truncated Result View**

## Microbiology

When possible, microbiology data available in discrete values displays in Table View. However, there are cases when this is not possible, including data related to sensitivities. In such cases, access the OLIS Full Report directly ([OLIS Full Report](#)) to see the appropriate detail.

1. For the appropriate row, select the attachment icon within the OLIS Full Report column

Lab and Pathology Results

All Chemistry Hematology Blood Bank Pathology **Microbiology** Other Flowsheet

Group By: None

Collection Date/Time	Last Updated	Order ID	Ordered As	Test	Result	Status	Specimen	Source	OLIS Full Report
17 Sep 2020 20:00	25 Sep 2020 13:04	cONPharmacytest (The Sal...	2019 Novel Coronavirus PCR	2019 Novel Coronavirus RdRp ge...	Detecte...		Other	Other	
17 Sep 2020 20:00	25 Sep 2020 13:04	cONPharmacytest (The Sal...	2019 Novel Coronavirus PCR	SARS-related Coronavirus E Gen...	Detecte...		Other	Other	
17 Sep 2020 20:00	25 Sep 2020 13:04	cONPharmacytest (The Sal...	2019 Novel Coronavirus PCR	COVID-19 Virus PCR Interpretation	COVID...		Other		

### Microbiology Tab

## Pathology

Pathology data is received in a report format and is not easily separated into detailed data without losing context. Therefore, Table View does not show the full set of data available. To facilitate workflow, high level information such as site of origin (body part) and the type of test performed (e.g., surgical pathology) is displayed in Table View. To view the pathology test results in the proper format, open the [OLIS Full Report](#).

1. For the appropriate row, select the attachment icon within the OLIS Full Report column.

Lab and Pathology Results

All Chemistry Hematology Blood Bank **Pathology** Microbiology Other Flowsheet

Group By: None

Collection Date/Time	Last Updated	Order ID	Ordered As	Test	Specimen	Result	Attachments	Test Result Status	OLIS Full Report
15 Mar 2013 10:10	09 Jun 2015 11:37	CV04_004_03 (Toronto Ge...	Surgical Pathology	Site Of Origin				Final	
15 Mar 2013 10:10	09 Jun 2015 11:37	CV04_004_03 (Toronto Ge...	Surgical Pathology	Surgical Pathology					
15 Mar 2013 10:10	09 Jun 2015 11:37	CV04_004_03 (Toronto Ge...	Surgical Pathology	Surgical Pathology					
15 Mar 2013 10:10	09 Jun 2015 11:37	CV04_004_03 (Toronto Ge...	Surgical Pathology	Surgical Pathology					
15 Mar 2013 10:10	09 Jun 2015 11:37	CV04_004_03 (Toronto Ge...	Cytology Non-Cervico/Vaginal	Site Of Origin	Body fluid	A. Sputum		Final	
15 Mar 2013 10:10	09 Jun 2015 11:37	CV04_004_03 (Toronto Ge...	Papanicolaou Smear Conventional	Site Of Origin	Tissue	PAP SMEAR		Final	

### Pathology Tab

## OLIS Full Report View

The OLIS Full Report contains all relevant information regarding a single lab order (e.g., results, comments, administrative info, etc.) and is designed to mimic the paper form of the order result that a clinician traditionally receives via fax.

To view the complete details of any lab order:

1. Select the attachment icon in the OLIS Full Report column within the appropriate result row of Table View

Lab and Pathology Results

All Chemistry Hematology Blood Bank Pathology Microbiology Other Flowsheet

Group By: None

Collection Date/Time	Last Updated	Order ID	Ordered As	Test	Result	Attachments	Reference Range	Units	Test Result Status	Specimen	OLIS Full Report
31 Dec 2017 00:00	12 Feb 2018 15:43	CV_OBR7_Test05 (OLIS La...	Microalbumin	Albumin; Urine				mg/L	Final	Urine	
31 Dec 2017 00:00	12 Feb 2018 15:43	CV_OBR7_Test05 (OLIS La...	Microalbumin	Creatinine; Urine					Final	Urine	
31 Dec 2017 00:00	12 Feb 2018 15:43	CV_OBR7_Test05 (OLIS La...	Microalbumin	Albumin/Creatinine Rat...							
17 Sep 2020 20:00	25 Sep 2020 13:04	cONPharmacytest (The Sal...	2019 Novel Coronavirus PCR	2019 Novel Coronavirus					Final	Other	
17 Sep 2020 20:00	25 Sep 2020 13:04	cONPharmacytest (The Sal...	2019 Novel Coronavirus PCR	SARS-related Coronavirus					Final	Other	
17 Sep 2020 20:00	25 Sep 2020 13:04	cONPharmacytest (The Sal...	2019 Novel Coronavirus PCR	COVID-19 Virus PCR In					Final	Other	

### Table View, OLIS Full Report Column

- 2. The Document Viewer opens and displays the report for the full order. Any attached documents will appear as hyperlinks that can be selected to view

**SMITH, DAN**      **DOB:** 08 Apr 1984 (35y) Male      **HCN:** 9600953476      ConnectingOntario  
**ClinicalViewer**

☑ Site Of Origin  
Test:                      Last Updated:  
Site Of Origin              09 Jun 2015 11:37

OLIS Full Report

**Specimen Type**  
Tissue

**Site Modifier**  
Colon

**Collection Date/Time**  
15 Mar 2013 10:10:00 EDT - 15 Mar 2013 10:40:00 EDT

**Specimen Collected By**  
Toronto General Hospital (Lab 4204)

**Specimen Received Date/Time**  
15 Mar 2013 10:30:00 EDT

**Surgical Pathology (partial)**  
Example of a test request with a state of Partial (A). (Toronto General Hospital) (Lab 4204)  
[OBR-2] (Toronto General Hospital)  
Gross Description  
[Click to view attachment](#)  
Example of a test result of (Toronto General Hospital) (Lab 4204)

**Privacy Disclaimer:**  
*This information is confidential and may only be used by the patient or individual listed in the footer. If found, please return to the organization listed in the footer. Shred when no longer needed.*  
Generated from ConnectingOntario  
User Id: Jeff.Reynolds                      Organization: Sunnybrook Health Sciences Centre                      Date: 19 Jan 2020 14:02

Print Current Tab      Close

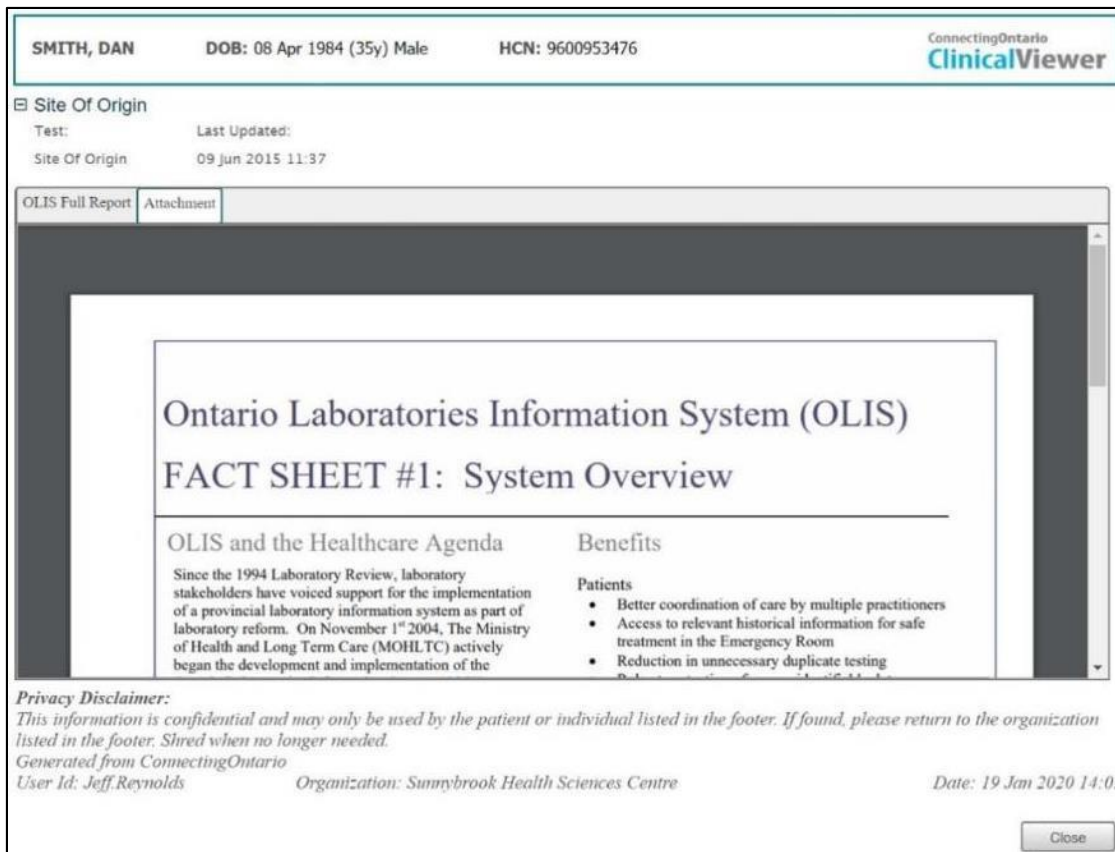
**Document Viewer, OLIS Full Report**

The report can also be printed from the Document Viewer ([Printing from Document Viewer](#)).

- 3. When an attachment hyperlink is selected, another tab opens in the Document Viewer and the attachment displays

*Note:* Selecting the same link more than once results in multiple tabs with the same attachment displaying. The only way to remove these duplicate attachment windows is to close and re-open the Document Viewer.





**Document Viewer, Viewing Attachment**

## Attachments

To view all of the attachments associated with a result, select the icon displayed in the Attachments column of Table View.

Collection Date/Time	Last Updated	Order ID	Ordered As	Test	Flag	Result	Attachments	Reference
15 Mar 2013 10:05	09 Jun 2015 08:59	CV04_001_033 (Toronto G...	Electrolytes	Chloride	LL	0.123456789012...		95 - 108
15 Mar 2013 10:05	09 Jun 2015 08:59	CV04_001_033 (Toronto G...	Protein Fractionation	Protein Pattern		[encapsulated dat...		
15 Mar 2013 10:05	09 Jun 2015 08:59	CV04_001_033 (Toronto G...	Specimen Comment	Specimen Result Comment: Che...		Value Type Format...		
15 Mar 2013 10:05	09 Jun 2015 08:59	CV04_001_033 (Toronto G...	Specimen Comment	Specimen Result Comment: Che...		Value Type String...		
15 Mar 2013 10:05	09 Jun 2015 08:59	CV04_001_033 (Toronto G...	Specimen Comment	Specimen Result Comment: Che...		Value Type Text D...		

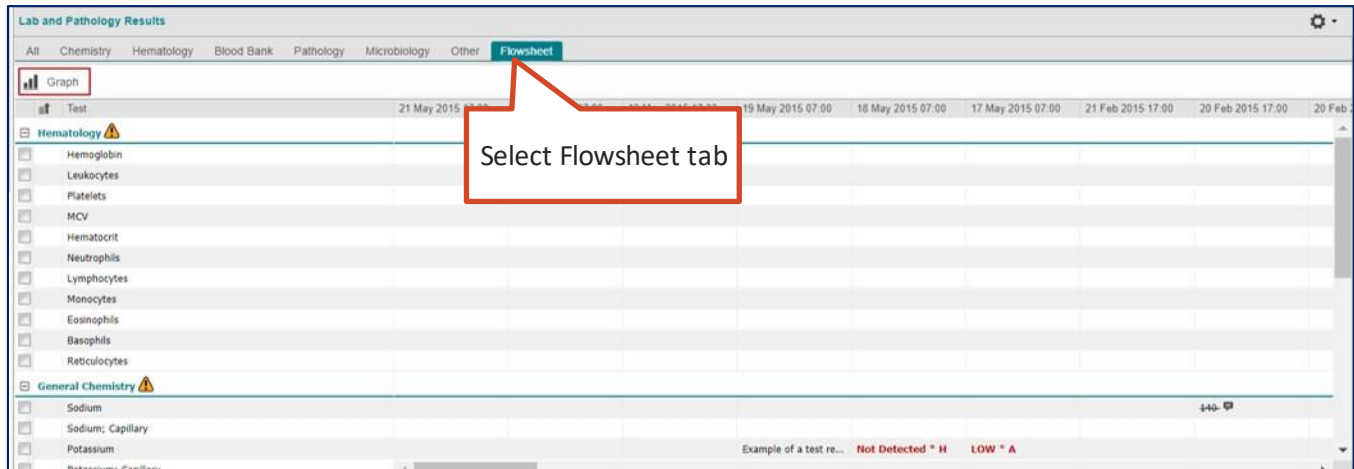
**Table View, Attachments Column**

Alternatively, Select the appropriate links in the OLIS Full Report ([OLIS Full Report View](#)). Attachments are not common for most modalities with the exception of pathology. As noted, attachments are associated with a particular result (generally in place of a discrete result value).

## Flowsheet View

Flowsheet View displays lab results in a tabular display over time for a pre-determined set of panels and test results.

To access Flowsheet View, select the Flowsheet tab. This tab can be accessed from all views except the condensed view.



### Flowsheet Tab Table View

*Note:* The results displayed in the trend view may not include all available data. Tests with multiple assay methods may have additional result values available for the same collection date/time; only one result value displays for these tests. To view all available results, use the “All” tab.

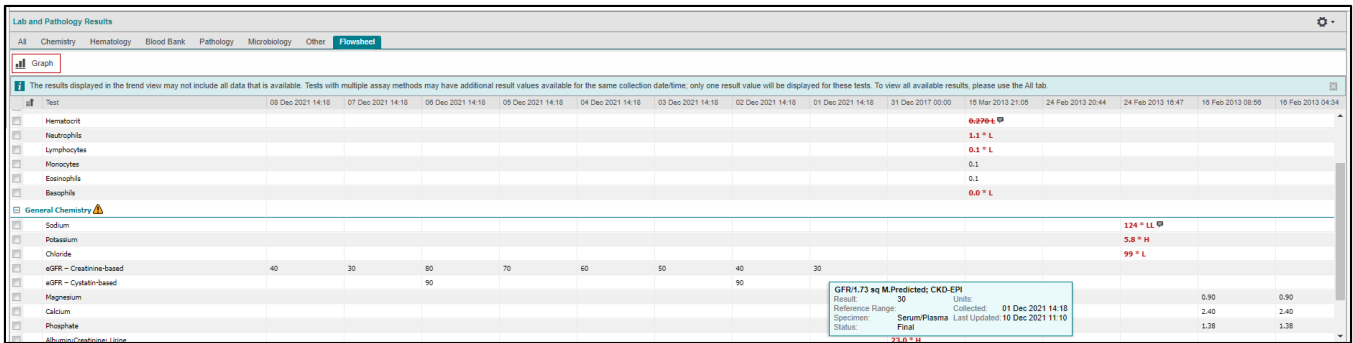
A sub-set of test results displays for the following panels:

- Hematology
- General Chemistry
- Lipid Profile
- Liver Panel/Pancreas Panel

The result value and any associated flag display directly in the Flowsheet Table View ([Flags](#)).

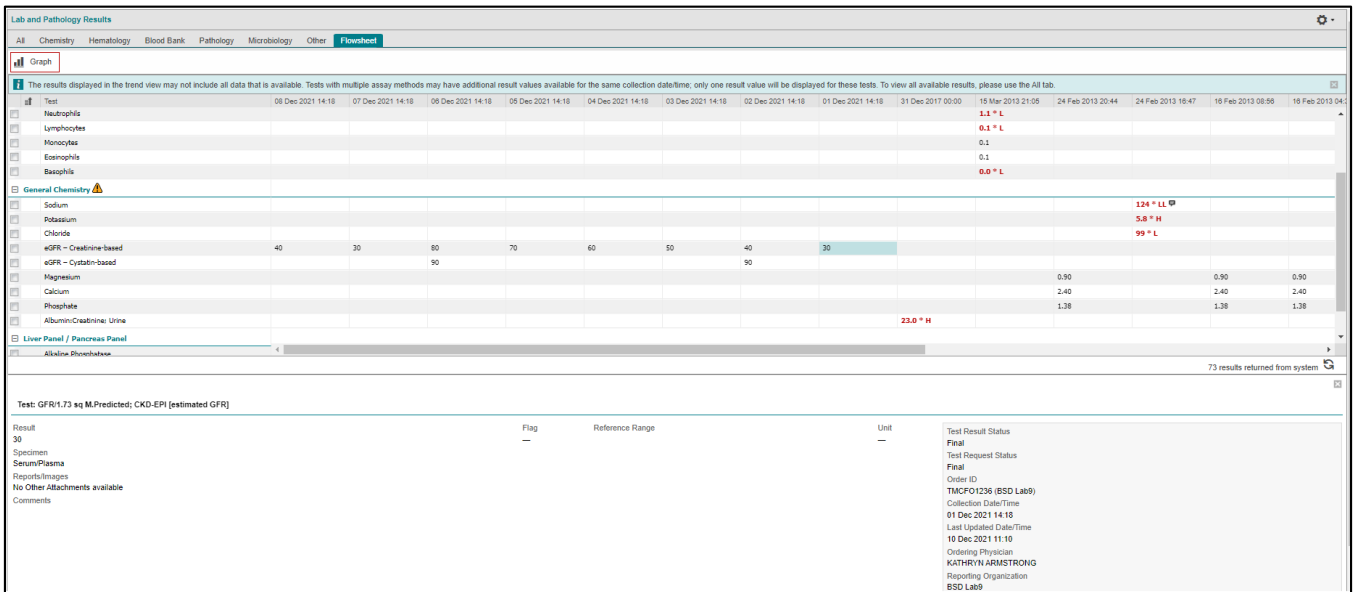
To access additional information on any lab result in the Flowsheet table:

1. Hover the mouse over the result value to see the Test Request Name (in **bold**), Result, Reference Range, Units, Specimen, specimen Collected date/time, Status and Last Updated date for the result



### Flowsheet Result Hover

2. Select the result value to display Details View for the result ([Details View](#))



### Flowsheet Details View

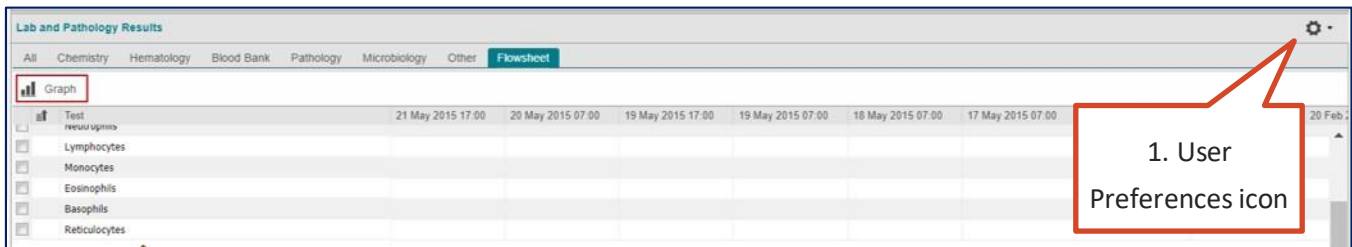
#### Notes:

1. If encapsulated information is associated with a result, the attachment is available from Details View only (i.e., attachment icons are not displayed in the Flowsheet view)
2. Flowsheets cannot be printed

## Flowsheet Preferences

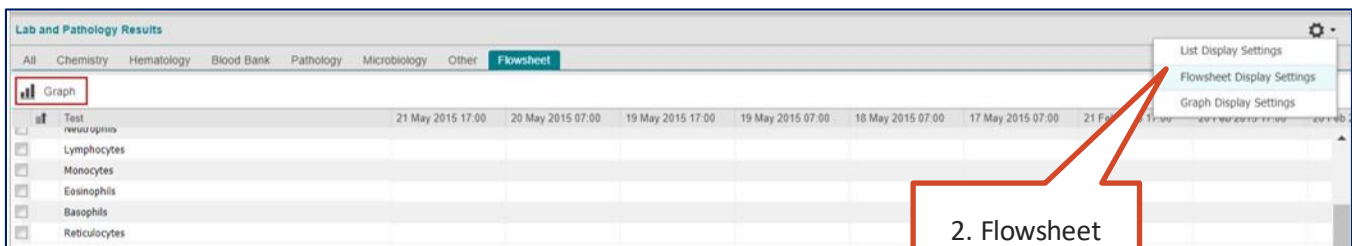
The dates in the flowsheet display in reverse chronological order (newest results first) by default. As a result, trends in test results are not displayed by default; trends are only available when the results are displayed in chronological order (oldest results first). You can choose to display the results in reverse chronological order or chronologically. If you choose chronological order, you also have the option to enable the trend display.

1. Select User Preferences on the right side of the Lab and Pathology Results portlet to view the drop-down menu



**User Preferences Icon**

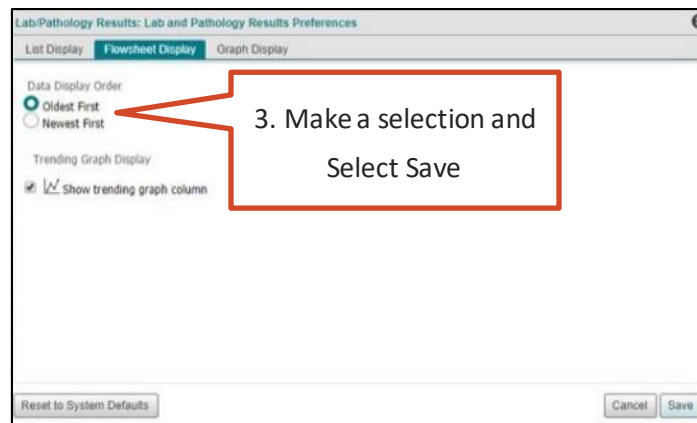
2. Select 'Flowsheet Display Settings' from the drop-down list



**Flowsheet Display Settings**

3. In the User Preferences dialog, select Oldest First to display the data in chronological order and Newest First to display information in reverse chronological order.

*Note:* You will only be able to display Trends if you set the Data Display Order to "Oldest First".



**Flowsheet User Preferences**

## Flowsheet Filtering

You can filter on the Test column in the Flowsheet tab:

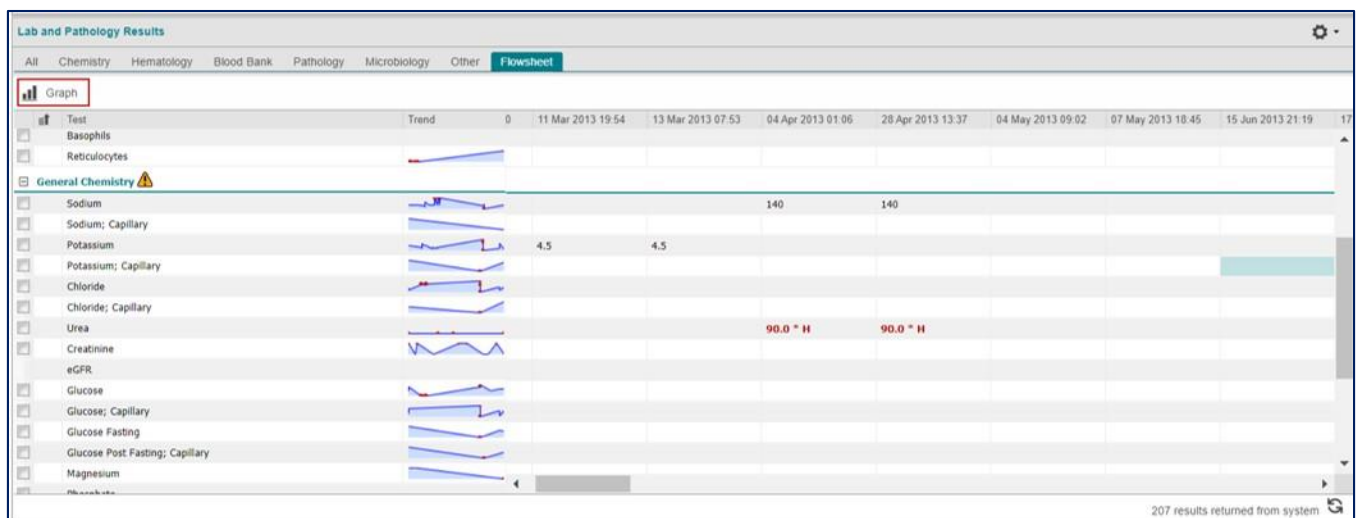
1. To apply a filter, refer to [Filtering \(Apply a Filter\)](#)
2. To remove a filter, refer to [Filtering \(Remove a Filter\)](#)

## Flowsheet Navigation

You can scroll both vertically and horizontally to see all presented information in the Flowsheet tab. You can also navigate rows using the keyboard arrow keys or the scroll wheel on the mouse.

## Trend

As mentioned above, if the flowsheet preferences are set to: 1) display oldest results first and 2) “Show Trending Graph Column” is enabled, result trends are displayed in a “Trend” column.

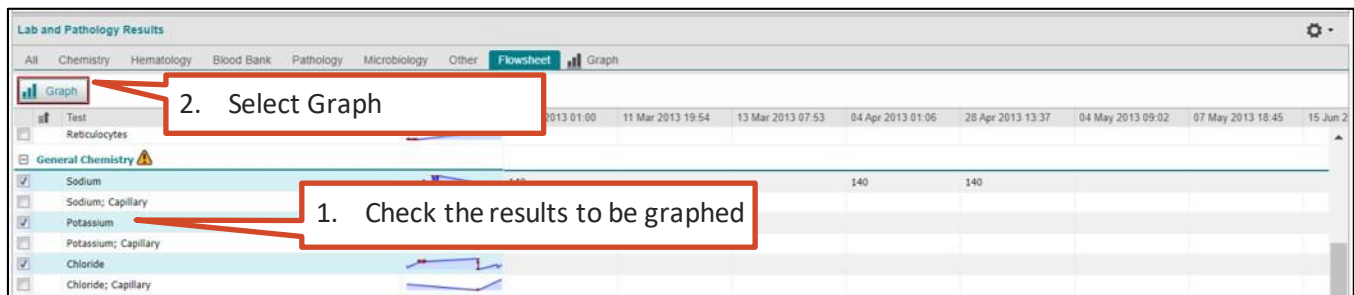


Trends in test results are displayed in a Trends column on the Flowsheet tab

## Graphs

It is possible to display a trend graph for results displayed in the Flowsheet tab. To do so, on the Flowsheet tab:

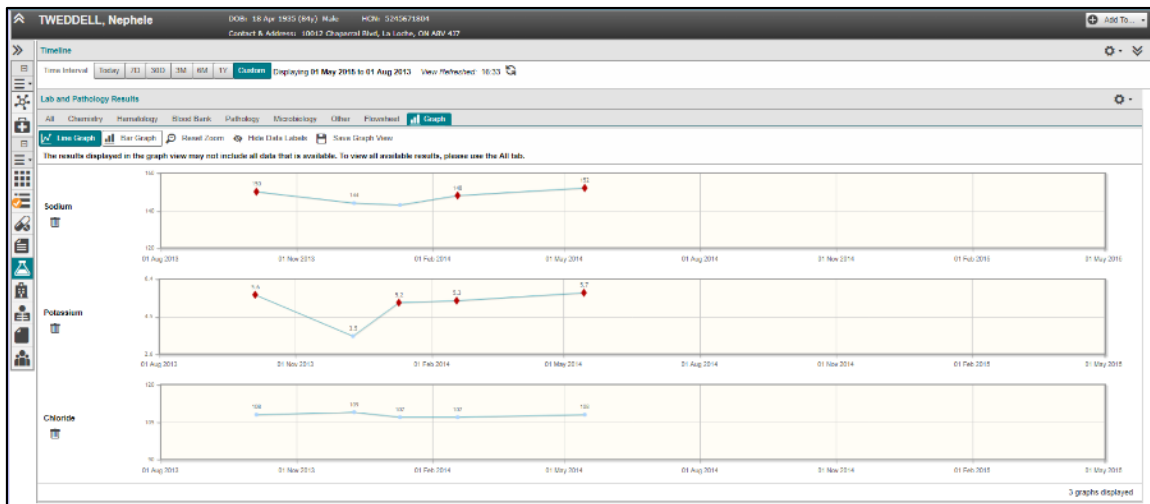
1. Select the checkbox beside one or more results that you wish to graph
2. Select Graph



### Viewing a Trend Graph

You can only display numeric values as a graph (not dates or alphabetic values)

Each selected test type displays in a separate graph on the Graph tab:



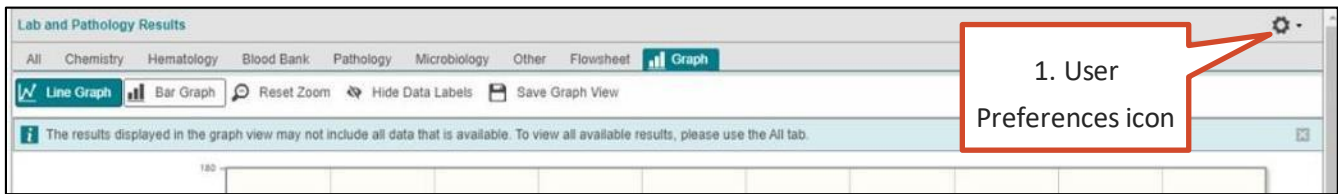
### Trend Graph – Line Graph

- On the graphs, blue dots represent normal results, red dots represent abnormal ones

## Graph Preferences

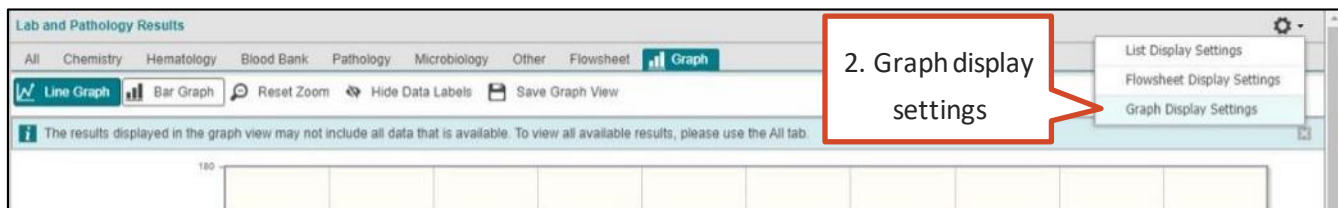
Data is graphed using lines (as opposed to bars) and data labels are displayed by default. These settings can be changed in the User Preferences as follows:

1. Select User Preferences on the right side of the Lab and Pathology Results portlet to view the drop-down menu



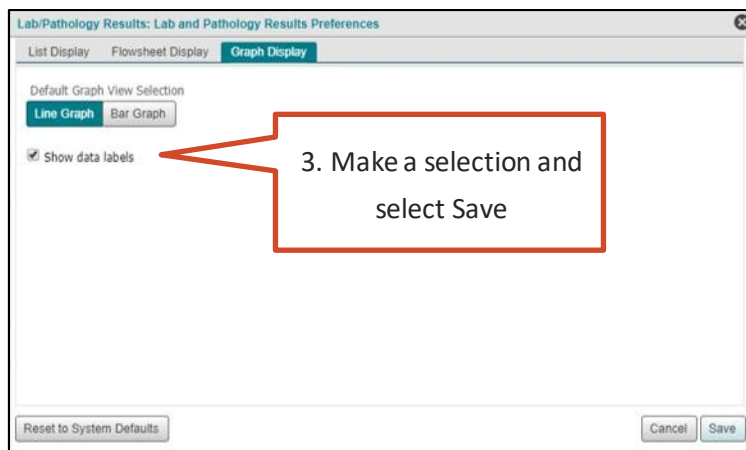
### User Preferences Icon

2. Select 'Graph Display Settings' from the drop-down list



### Flowsheet Display Settings

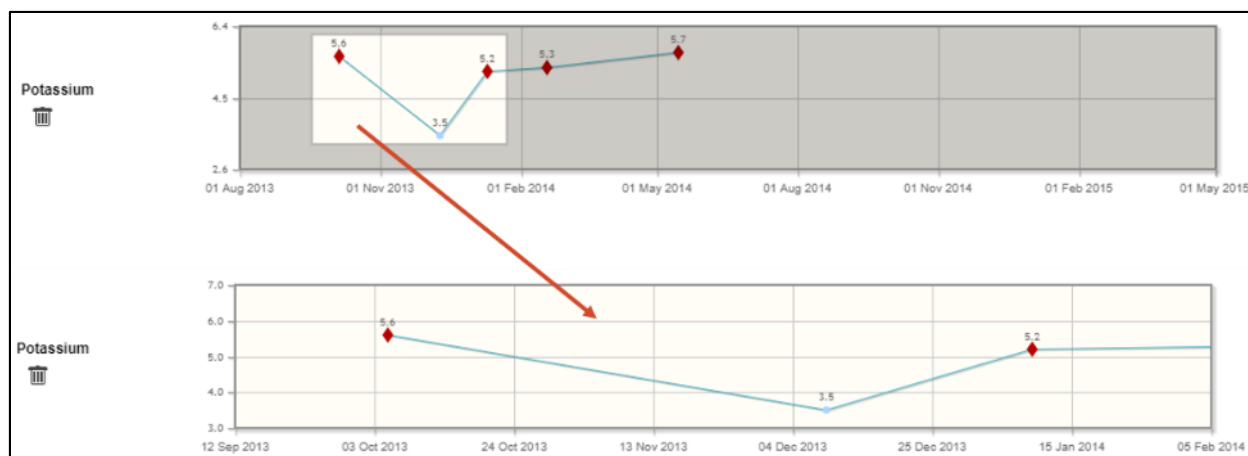
3. In the User Preferences dialog, select Line Graph or Bar Graph according to your preference
  4. You can also choose whether to display data labels
- Note:* Changes made within this dialog will update the [Graph Toolbar](#) to remain in sync with your choices



### Graph Display User Preferences

## Zooming In

- You can zoom in on a particular section of the graph by drawing a rectangle around it. Reset to the default view by Selecting **Reset Zoom**

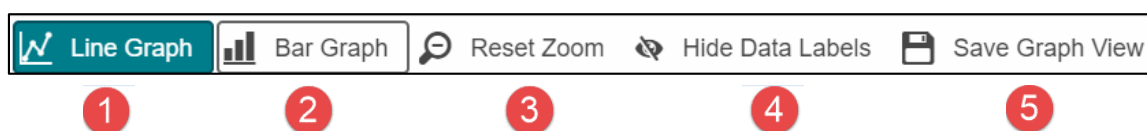


### Zooming in on a Graph

## Graph Toolbar

The **Graph Toolbar**, displayed at the top of a trend graph, provides options to control the display of the graph. When viewing a graph, there are 5 buttons available:

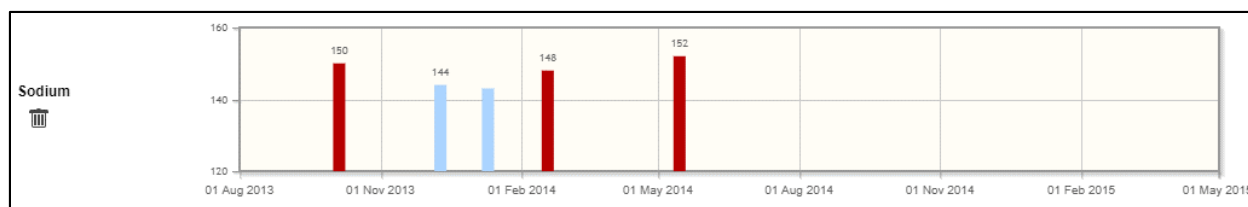
1. Line Graph
2. Bar Graph
3. Reset Zoom
4. Show (or Hide) Data Labels
5. Save Graph View



### Graph Toolbar

1. **Line Graph Button:**
  - Displays a graph in the default format (line graph)
2. **Bar Graph Button:**
  - Selecting **Bar Graph** to change the display to a bar graph:





### Trend Graph – Line Graph

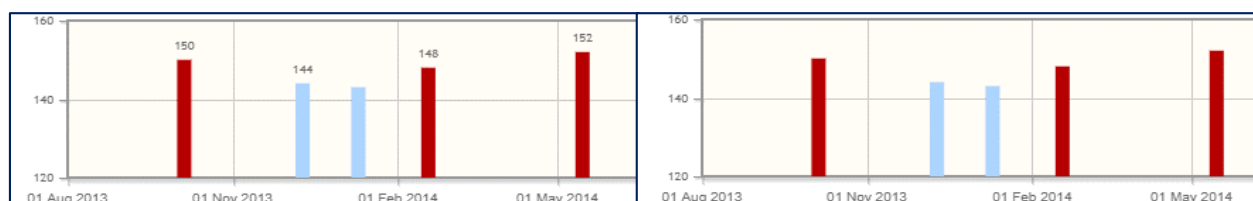
*Note:* Changes made to Line versus Bar graph will also update the [Graph User Preferences](#) to keep them in synch.

#### 3. Reset Zoom Button:

- Resets a graph to the default view after a zoom has been applied

#### 4. Show/Hide Data Labels:

- Selecting Show Data Labels displays the value above each data point
- Selecting Hide Data Labels removes the display of the values above each data point

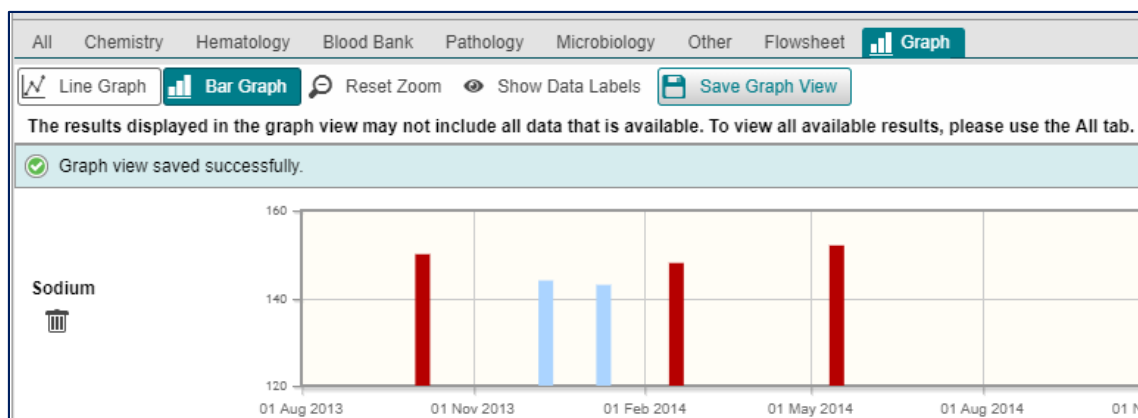


### Graph with Data Labels (left) and without (right)

*Note:* Changes made to Data Label visibility will also update the [Graph User Preferences](#) to keep them in sync.

#### 5. Save Graph Button:

- Select **Save Graph** to save the selected test type(s) to be graphed in the future



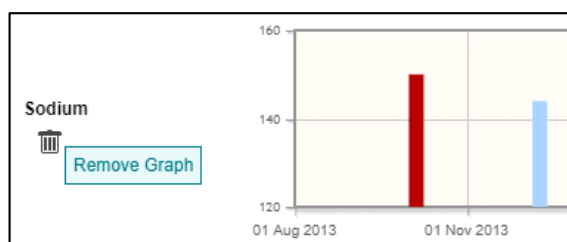
### Graph View Saved Successfully

When graphs are saved, the Graph tab remains available for future sessions. Selecting it displays a graph of the saved test types for the currently selected patient and timeline.

*Note:* Graphs are saved on a per-user, per-view basis. Thus it is possible to have different saved Graph Views in the Lab and Pathology Results portlet within two different custom views, e.g. Individual Portlet View and user-created custom view.

### Removing a Graph

Remove a graph by selecting Remove Graph. To remove a graph from the Saved Graph View, save the graph after removing it.



### Removing a Graph

## Preferences

Standard personalization and user preference features are available within the Lab and Pathology Results portlet for each modality (tab).

*Note:* Due to the complex interaction between variables (e.g., source, units, results, etc.) of the lab and pathology information in the portlet, OLIS does not recommend applying or allow personalization of this portlet that might misrepresent the data (e.g., hiding columns).

You can set preferences for Table View using one of two methods:

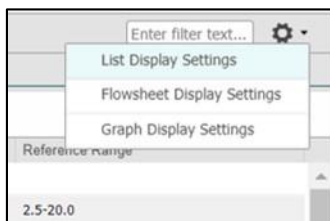
A. Temporarily adjust preferences directly on the table:

- Adjust the width of any column ([Column Width](#))
- Hide any non-locked columns from the display. This varies based on modality ([Hide or Show Columns](#))
- Sort the list by any column in ascending or descending order ([Sorting](#))
- Filter the list by Test column ([Filtering](#)). Filtering is not available for any other column in the Flowsheet tab.


*Note:* These preferences are not saved after navigating away from the portlet.

B. To permanently personalize the list, select User Preferences  and select List Display Settings

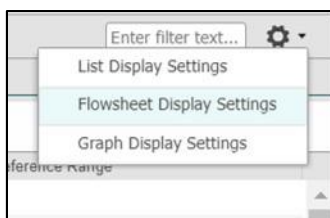
- Change which columns are displayed (non-locked columns only; this varies by modality) ([Hide or Display Columns](#))
- Change the order in which the columns are displayed ([Change the Order of Displayed Columns](#))
- Select which column should be used as the default sort ([Change the Default Sort Column and Sort Order](#))
- Reset to system defaults ([Reset Preferences to System Defaults](#))




**User Preference Button, List Display Settings**

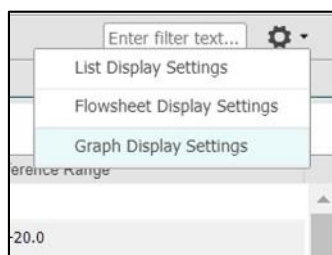
C. To permanently personalize the Flowsheet display, select User Preferences  and select Flowsheet Display Settings

- Change the data display order i.e. chronological or reverse chronological ([Flowsheet Preferences](#))
- Enable the display of the Trend column ([Flowsheet Preferences](#))



## User Preference Button, Flowsheet Display Settings

- D. To permanently personalize the Graph display, select User Preferences  and select Graph Display Settings
- Toggle the default graph view selection between Line and Bar ([Graph Display Settings](#))
  - Toggle the display of data labels ([Graph Display Settings](#))



## User Preference Button, Graph Display Settings

### Sorting

There are 2 types of sorting for this portlet. The first is the OLIS-defined sort, and the second is the user-defined sort.

#### 1. Default Sort (OLIS-Defined Sort)

Default sort is also referred to as the OLIS-defined sort and is important to keep in mind while viewing results. In order to maintain the sequence in which labs have intended to display their result, the test result data is sorted by default in the following sort order:

Order	Sort Key (Default Mode for OLIS)	Notes
1	Collection date and time, in descending order	Ensures that all tests are sorted by the latest specimen collection date first.
2	OLIS test request sort key	Defined by the laboratory that reported the result. Ensures that the test is sorted in the manner in which the laboratory believes is clinically important.
3	OLIS test result sort key	Defined by the laboratory that reported the result. Ensures that the test is sorted in the manner in which the laboratory believes is clinically important.

## Lab and Pathology Results, Default Sort

### 2. User-Defined Sort

Applying the User-defined sort, you can choose to sort by any column. You can sort on any visible column in the Summary View – Condensed Portlet, Summary List View or Individual Portlet View. However, you can only sort on one column at a time.

To apply sorting, refer to [Sorting](#).

*Note:* Sorting any column in ascending or descending order re-orders the results according to the fields' data type (either alphabetical, numerical, or date) in an ascending/descending direction. Some columns allow sorting based on a limited set of values.

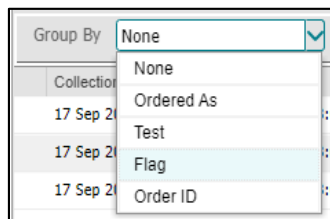
Within the Lab and Pathology Results portlet, you can sort information using the “Group By” option. Refer to [Grouping](#) for details.

*Note:* Use caution when applying a User-defined Sort. The column header has an up or down triangle indicating that the column has a sort applied. When an ascending/descending sort is applied, the only way to “unsort” is to refresh the ClinicalViewer, change to a different view or reset your preferences to the system defaults.



### Grouping

You can choose to group the display of lab results using a drop-down menu in the portlet. The following options are available:

1. None (default display) – lab results are not grouped by any attribute
2. Ordered As (Test Request name) – lab results are grouped together in the order sets, panels or batteries they were ordered
3. Test – lab results are grouped together based on test result name
4. Flag – lab results are grouped together based on flag
5. Order ID – lab results are grouped together based on the lab order ID and the lab name.



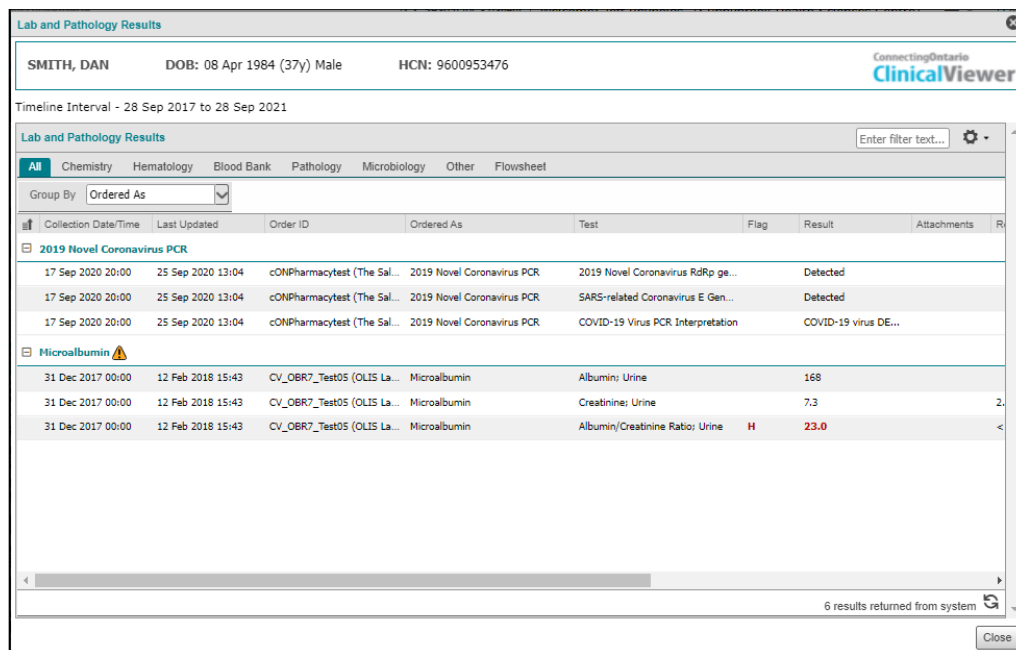
**Grouping Options**

- If there are abnormal/critical results within the group, a yellow triangle alert  icon appears beside the group header with a tooltip indicating: “Abnormal/critical results present”
- All groups are expanded by default. Use the expand/collapse all  controls to expand and collapse all groups simultaneously.
- Column-level sorting works while the portlet is grouped, the sorting applies to the results *within* each group. In other words, results are re-ordered within each group.
- Filtering works while the portlet is grouped, you can filter for any column that has filter enabled.
- Grouping persists when you filter and sort the portlet.
- Grouping does not persist when you switch between views, patients or time intervals. Grouping also does not persist between sessions.


## A. Group by Ordered As

Grouping by Ordered As displays the test results by the test request name that they were ordered as at a high level. This option is useful to identify what was ordered. For example, group order as Phosphate.

Each group header displays the Test Request name, a warning indicator if any results are abnormal, Test Request status, specimen and collection date/time. Note that only tests from the same order are grouped together using this option. As a result, you may see multiple Phosphate groups (for example) as they were ordered separately.



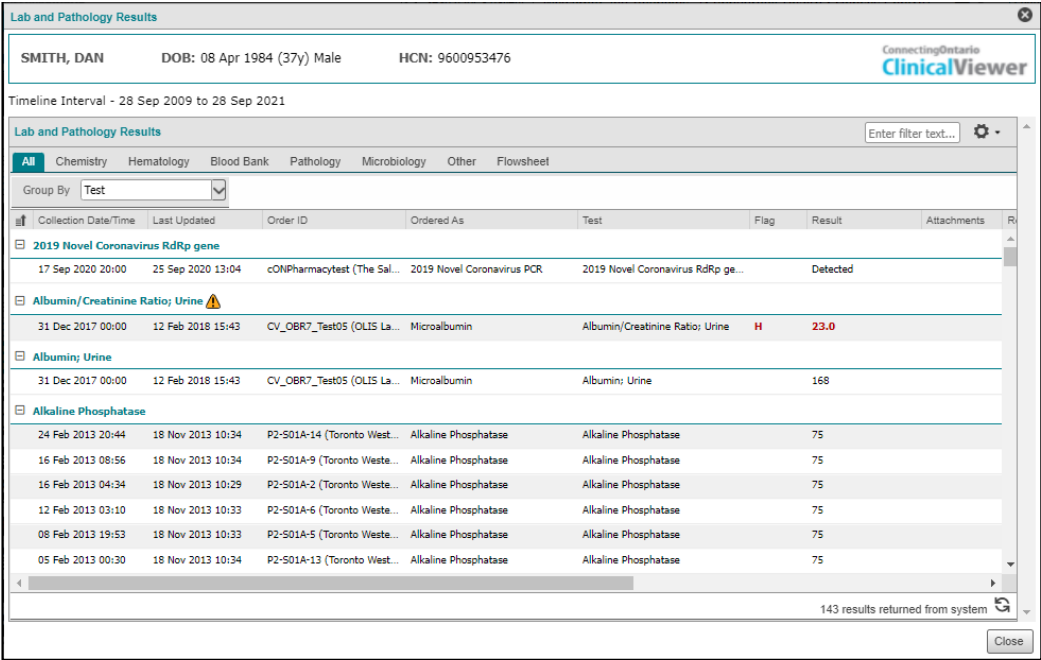
The screenshot shows a table of lab results grouped by 'Ordered As'. The table has columns for Collection Date/Time, Last Updated, Order ID, Ordered As, Test, Flag, Result, and Attachments. The results are grouped into two main categories: '2019 Novel Coronavirus PCR' and 'Microalbumin'. The 'Microalbumin' group has a warning icon and a result of 23.0 with a red 'H' flag.

Collection Date/Time	Last Updated	Order ID	Ordered As	Test	Flag	Result	Attachments
<b>2019 Novel Coronavirus PCR</b>							
17 Sep 2020 20:00	25 Sep 2020 13:04	cONPharmacytest (The Sal...	2019 Novel Coronavirus PCR	2019 Novel Coronavirus RdRp ge...		Detected	
17 Sep 2020 20:00	25 Sep 2020 13:04	cONPharmacytest (The Sal...	2019 Novel Coronavirus PCR	SARS-related Coronavirus E. Gen...		Detected	
17 Sep 2020 20:00	25 Sep 2020 13:04	cONPharmacytest (The Sal...	2019 Novel Coronavirus PCR	COVID-19 Virus PCR Interpretation		COVID-19 virus DE...	
<b>Microalbumin</b> 							
31 Dec 2017 00:00	12 Feb 2018 15:43	CV_OBR7_Test05 (OLIS La...	Microalbumin	Albumin: Urine		168	
31 Dec 2017 00:00	12 Feb 2018 15:43	CV_OBR7_Test05 (OLIS La...	Microalbumin	Creatinine: Urine		7.3	2.
31 Dec 2017 00:00	12 Feb 2018 15:43	CV_OBR7_Test05 (OLIS La...	Microalbumin	Albumin/Creatinine Ratio: Urine	H	23.0	<

### Group by Ordered As

## B. Group by Test

Grouping by Test displays the test results by name, in alphabetical order. The group header displays the Test Result name, which is an alternative to trending since it shows similar tests grouped together and sorted by date.



Group by Test Name

## C. Group by Flag

Grouping by Flag brings all group tests with the same flag name together. The results with no flags are grouped together in a group of “Non Flagged Results”. Groups are displayed alphabetically by flag name. This is helpful for reviewing all critical high (HH) tests at a glance.

The group header displays the Flag Name.

Lab and Pathology Results

SMITH, DAN      DOB: 08 Apr 1984 (37y) Male      HCN: 9600953476

ConnectingOntario  
ClinicalViewer

Timeline Interval - 28 Sep 2009 to 28 Sep 2021

Lab and Pathology Results

Group By: Flag

Collection Date/Time	Last Updated	Order ID	Ordered As	Test	Flag	Result	Attachments
<b>Non Flagged Results</b>							
<b>A</b>							
15 Mar 2013 10:05	09 Jun 2015 08:59	CV04_001_033 (Toronto G...	Urinalysis Chemical	Erythrocytes	A	SMALL	
<b>AA</b>							
15 Mar 2013 10:05	09 Jun 2015 08:59	CV04_001_033 (Toronto G...	Urinalysis Chemical	Colour	AA	RED	
<b>H</b>							
31 Dec 2017 00:00	12 Feb 2018 15:43	CV_OBR7_Test05 (OLIS La...	Microalbumin	Albumin/Creatinine Ratio: Urine	H	23.0	
15 Mar 2013 21:05	09 Jun 2015 10:18	CV04_002_03 (Toronto Ge...	WBC Manual Differential	Myelocytes: Blood	H	<0.1	
15 Mar 2013 21:05	09 Jun 2015 10:18	CV04_002_03 (Toronto Ge...	WBC Manual Differential	Promyelocytes: Blood	H	<0.1	
15 Mar 2013 10:05	09 Jun 2015 08:59	CV04_001_033 (Toronto G...	Urinalysis Microscopic	Erythrocytes	H	20-30	
15 Mar 2013 10:05	09 Jun 2015 08:59	CV04_001_033 (Toronto G...	Urinalysis Microscopic	Bacteria	H	Indeterminate res...	
15 Mar 2013 10:05	09 Jun 2015 08:59	CV04_001_033 (Toronto G...	Prostatic Specific Antigen	Prostate Specific Antigen [PSA]	H	> 1500	
15 Mar 2013 10:05	09 Jun 2015 08:59	CV04_001_033 (Toronto G...	Urinalysis Chemical	Protein	H	= OR >3.0	

143 results returned from system

### Group by Flag

## D. Group by Order ID

Group by Order ID brings all group tests that have the same Order ID and were done in the same lab together. Groups are displayed in reverse chronological order with the most recent Order ID first. If there are two Order IDs with identical dates and times then they are sorted alphabetically.

Lab and Pathology Results

SMITH, DAN      DOB: 08 Apr 1984 (37y) Male      HCN: 9600953476

ConnectingOntario  
ClinicalViewer

Timeline Interval - 28 Sep 2009 to 28 Sep 2021

Lab and Pathology Results

Group By: Order ID

Collection Date/Time	Last Updated	Order ID	Ordered As	Test	Flag	Result	Attachments
<b>cONPharmacytest (The Salvation Army Grace Hospital)</b>							
17 Sep 2020 20:00	25 Sep 2020 13:04	cONPharmacytest (The Sal...	2019 Novel Coronavirus PCR	2019 Novel Coronavirus RdRp ge...		Detected	
17 Sep 2020 20:00	25 Sep 2020 13:04	cONPharmacytest (The Sal...	2019 Novel Coronavirus PCR	SARS-related Coronavirus E Gen...		Detected	
17 Sep 2020 20:00	25 Sep 2020 13:04	cONPharmacytest (The Sal...	2019 Novel Coronavirus PCR	COVID-19 Virus PCR Interpretation		COVID-19 virus DE...	
<b>CV_OBR7_Test05 (OLIS Lab3)</b>							
31 Dec 2017 00:00	12 Feb 2018 15:43	CV_OBR7_Test05 (OLIS La...	Microalbumin	Albumin: Urine		168	
31 Dec 2017 00:00	12 Feb 2018 15:43	CV_OBR7_Test05 (OLIS La...	Microalbumin	Creatinine: Urine		7.3	
31 Dec 2017 00:00	12 Feb 2018 15:43	CV_OBR7_Test05 (OLIS La...	Microalbumin	Albumin/Creatinine Ratio: Urine	H	23.0	
<b>CV04_002_03 (Toronto General Hospital)</b>							
15 Mar 2013 21:05	09 Jun 2015 10:18	CV04_002_03 (Toronto Ge...	WBC Manual Differential	Body Height: Measured		180	
15 Mar 2013 21:05	09 Jun 2015 10:18	CV04_002_03 (Toronto Ge...	WBC Manual Differential	Lymphocytes: Blood	L	0.1	
15 Mar 2013 21:05	09 Jun 2015 10:18	CV04_002_03 (Toronto Ge...	WBC Manual Differential	Monocytes: Blood		0.1	
15 Mar 2013 21:05	09 Jun 2015 10:18	CV04_002_03 (Toronto Ge...	WBC Manual Differential	Eosinophils: Blood		0.1	

143 results returned from system

### Group by Order ID



*Note:* To return to the default view, you must select the 'None' Group By option.

## Filtering

The portlet allows filtering in all of the columns that are visible in the Summary View, Summary List View, and Individual Portlet View.

You can apply filters to one or multiple columns at the same time (e.g., Test and Specimen columns). For most columns, applying a filter requires you to type in free text keywords. The portlet list applies the filter immediately as the text is entered.

To apply a filter, refer to [Filtering \(Apply a Filter\)](#).

To remove a filter, refer to [Filtering \(Remove a Filter\)](#).


*Note:* Filtering by the "Test" and "Ordered As" columns can result in a dramatic change in the table view displayed. You must pay close attention when filtering is applied to ensure the correct interpretation of the information. Filtering based on these fields can remove important contextual information, such as other tests that were ordered together, etc.

## Error Messages

If there is a system issue, an error message displays with an error number and a short descriptive message.

### System Error Messages

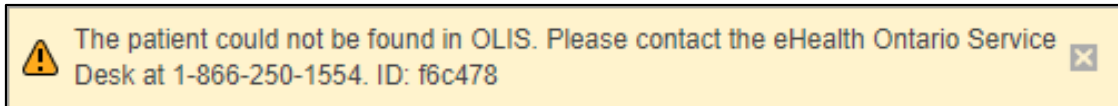
**Message:** "There was an error accessing the component service. Data may be available but an error has occurred. Please contact the eHealth Ontario Service Desk at 1-866-250-1554."



**Reasons:**

- SOAP Errors
- Unsupported message type
- Unable to extract content
- Data or identifiers are not valid
- Health card reported lost or stolen, or the version code is incorrect
- Unauthorized users
- Host processing error

**Message:** “The patient could not be found in OLIS. Please contact the eHealth Ontario Service Desk at 1-866-250-1554.”



**Reason:** The health card number, gender or date of birth submitted for the patient (as stored in the Client Registry) does not match the health card number that OLIS has recorded for the patient.

**Message:** “Warning: Some or all of the requested laboratory information was not returned due to a patient consent directive”.

**Reason:** The patient has a consent directive blocking his/her records.

**Message:** “Not all data is displayed. The maximum results have been reached. Please select a shorter time frame.”

**Reason:** There are more results available for the patient over the requested time frame than can effectively be processed by the web browser.

### Lab and Pathology Results, System Error Messages

## Printing

The OLIS Full Report contains all of the relevant information regarding a single lab order (e.g., results, comments, administrative info, etc.). This is designed to mimic the paper form of the order result a clinician typically receives via fax.

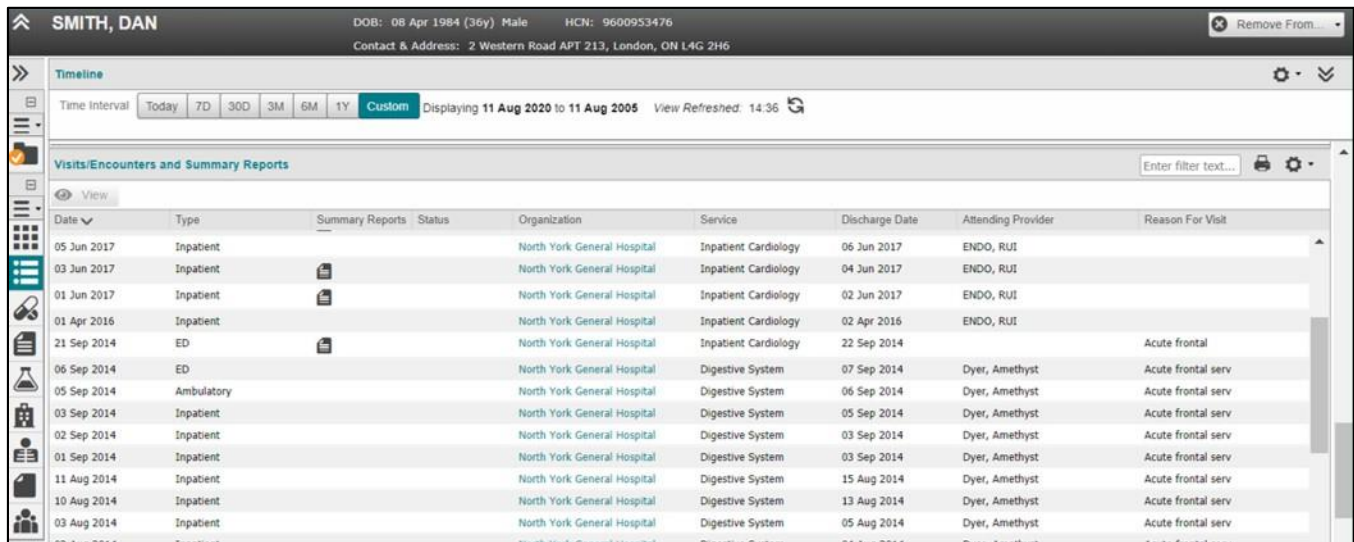
Printing in the Lab and Pathology Results portlet uses the Document Viewer and follows OLIS standards. Printing is allowed only from the Document Viewer, where the OLIS Full Report and attachments are displayed. The printout contains two headers: OLIS and ConnectingOntario (DOB and gender fields), footer (Privacy Disclaimer) and body (the report content).

For more details, refer to [Printing from Document Viewer](#).

*Note:* Printing of the Lab and Pathology Results table view is not available.

# Visits/Encounters and Summary Reports Portlet

The Visits/Encounters and Summary Reports portlet displays a list of all encounters (visits/episodes) for the selected patient from all data sources (locations) within the time period selected on the timeline. Any visit/encounter that **started**, **finished**, or is **ongoing** during the selected timeline range displays.



## Visits/Encounters and Summary Reports Portlet

### Information Available in Each View

The available information columns in each view are detailed below. By default, the full-size portlet (as displayed above) shows all available columns. A checkmark ✓ indicates which ones are displayed by default. Available columns that can be added temporarily or permanently are indicated by an A:

Column	Summary View – Condensed Portlet	Summary List and Individual Portlet View	Description
Date	✓	✓	<p>Visit date if an ambulatory visit.</p> <p>Encounter start date if inpatient, emergency department (ED) or recurring visits.</p> <p><i>* Default sort using this column</i></p>
Type	✓	✓	<p>■ Inpatient*</p> <p>■ Ambulatory*</p>

Column	Summary View – Condensed Portlet	Summary List and Individual Portlet View	Description
			<ul style="list-style-type: none"> <li>■ ED (Emergency Department)*</li> <li>■ Pre-admit</li> <li>■ Recurring Outpatient</li> <li>■ Unknown / Other</li> </ul> <p>* An icon appears on the timeline for these visit types</p>
Summary Reports	✓	✓	<p>An attachment icon appears when documents are available for viewing.</p> <p>Select View with the row selected or select the attachment icon to open the Document Viewer with the document of interest displayed (<a href="#">Viewing Documents</a>).</p>
Status	A	✓	Displays <b>Amended (A)</b> if any of the documents available under summary reports have been amended. Otherwise, this column is left blank.
Organization	✓	✓	The facility or organization where the patient was actually seen. Select the link to see additional information.
Service	A	✓	The service department or clinic where the visit/encounter took place (e.g., Cardiology, Fracture Clinic).
Discharge Date	A	✓	<p>Date of discharge for the visit/encounter. If an Inpatient or ED visit does not have a discharge date, it is considered to be ongoing.</p> <p><i>Note:</i> Ambulatory visits never have a discharge date.</p>
Attending Provider	A	✓	Attending provider for the visit/encounter.

Column	Summary View – Condensed Portlet	Summary List and Individual Portlet View	Description
Reason for Visit	A	✓	Reason for visit or the diagnosis for the visit.
Visit/ Encounter ID	A	✓	Visit or encounter number.  <i>Note:</i> This is a system number that can be used for cross-referencing with the Documents/Notes portlet.

### Visits/Encounters and Summary Reports Data Elements

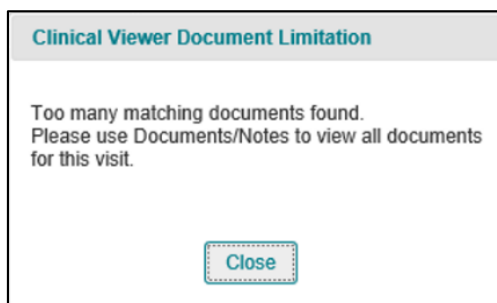
## Summary Reports

Depending on the type of visit, you can view certain documents associated with each visit from this portlet using the Document Viewer (as listed in the table below). Any documents not available directly from the Visits/Encounters portlet are available in the Documents/Notes portlet.

Visit Type	Document Type to Display
ED	Triage Note, ED Visit Report
Inpatient	Admission Assessment, Discharge Summary, Medication Reconciliation Report
Ambulatory	Display all report types associated to the visit (no filtering)
Pre-Admit	Display all report types associated to the visit (no filtering)
Recurring Outpatient	Display all report types associated to the visit (no filtering)
Unknown /Other	Display all available reports (no filtering)

### Types of Reports Displayed per Visit Type

*Note:* If there are more than 20 documents, this message displays:




### Too many matching documents


## Preferences

By default, the full-size Visits/Encounters and Summary Reports portlet shows all available columns. You can set preferences for the portlet list using two methods.

- A. Temporarily adjust preferences directly on the list.
  - Adjust the width of any column ([Column Width](#))
  - Hide any of the columns from the display ([Hide or Show Columns](#))
  - Sort the list by any column in ascending or descending order ([Sorting](#))
  - Filter the list by the date column ([Filtering](#))

*Note:* Above preferences are not saved after navigating away from the portlet.

- B. To permanently personalize the list, select User Preferences 
  - Change which columns are displayed ([Hide or Display Columns](#))
  - Change the order in which the columns are displayed ([Change the Order of Displayed Columns](#))
  - Select the column to be used as the default sort ([Change the Default Sort Column and Sort Order](#))
  - Reset to system defaults ([Reset Preferences to System Defaults](#))

*Note:* To print the list of encounters, select Print  ([Printing from List Views](#))

# Diagnostic Imaging Portlet

The Diagnostic Imaging (DI) portlet includes reports for all modalities found in the Diagnostic Imaging department. The categories are based on the regional Diagnostic Imaging categorization of procedures. This portlet provides access to DI data pulled directly from Ontario Health's Diagnostic Imaging Common Service (DI CS). Reports and images are accessible from any of the three provincial DI repositories:

- NEODIN
- SWODIN
- HDIRS

Procedure Date/Time	Report	Image	Procedure Description	Additional Information	Report Status	Organization	Accession Number
23 Mar 2018 08:30			LASER SURF-RINGUINAL UTF16		Final	St Michaels Hospital	ACC UTF16.20180323173900
13 Jul 2017 15:25			INTRAVASCU-LLQ; INTRAVASCU-LLQ; INTRA...	(Intravascular Ultrasound, Left lower quadra...	Amended (A)	St Michaels Hospital	ACC IM R2.P1.20171220-0022
23 May 2017 15:51			INTRAVASCU-LLQ; INTRAVASCU-LLQ	(Intravascular Ultrasound, Left lower quadra...	Amended (A)	St Michaels Hospital	ACC IM R2.P1.20171220-0021
05 Apr 2017 02:17			DIGITAL RA-RADIUSULNAL; DIGITAL RA-RA...	(Left, Digital Radiography, Radius and ulna)	Preliminary	St Michaels Hospital	ACC IM R2.P1.20171220-0020
16 Feb 2017 00:42			INTRAOCULA-SIGMOID; INTRAOCULA-SIGM...	(Intraocular Lens Data, Sigmoid colon)	Preliminary	St Michaels Hospital	ACC IM R2.P1.20171220-0019
26 Dec 2016 23:08			RADIO FLUO-SCJOINTR; RADIO FLUO-SCJOI...	(Sternoclavicular joint, Radio Fluoroscopy, Ri...	Final	St Michaels Hospital	ACC IM R2.P1.20171220-0018
06 Nov 2016 17:34			RADIOGRAPH-INTMAMMARYAR; RADIOGRA...	(Internal mammary artery, Radiographic ima...	Final	St Michaels Hospital	ACC IM R2.P1.20171220-0017
15 Sep 2016 17:00			HEMODYNAMI-CEREBHEMISPHERELE; HEMO...	(Left, Hemodynamic Waveform, Cerebral he...	Final	St Michaels Hospital	ACC IM R2.P1.20171220-0016
24 Jul 2016 11:25			MAGNETIC R-LLQ; MAGNETIC R-LLQ	(Left lower quadrant of abdomen, Magnetic ...	Final	St Michaels Hospital	ACC IM R2.P1.20171220-0015
05 Jun 2016 10:51			INTRAVASCU-BILEDUCT; INTRAVASCU-BILE...	(Intravascular Optical Coherence Tomograph...	Final	St Michaels Hospital	ACC IM R2.P1.20171220-0014
12 Apr 2016 04:17			RESPIRATOR-ILIACVL; RESPIRATOR-ILIACVL	(Iliac vein, Left, Respiratory Waveform)	Final	St Michaels Hospital	ACC IM R2.P1.20171220-0013
20 Feb 2016 08:42			RADIO FLUO-LIVER; RADIO FLUO-LIVER	(Liver, Radio Fluoroscopy)	Final	St Michaels Hospital	ACC IM R2.P1.20171220-0012

Diagnostic Imaging Portlet

## Consent for the Diagnostic Imaging Portlet

A warning message on a yellow notification bar indicates when data in DI CS is blocked due to a consent directive. It is not currently possible to override consent blocks in the DI portlet nor retrieve blocked DI data stored in DI CS. Refer to the Privacy and Security Information tip sheet for further information about consent.

Procedure Date/Time	Report	Image	Procedure Description	Additional Information	Report Status	Organization
No results available for the selected time interval.						

Diagnostic Imaging Portlet: Consent Directive Warning

## Information Available in Each View

The available information columns in each view are detailed below. The columns available in the small and large portlets are the same, and are fixed (columns cannot be added or deleted to either view).

Column	Description
Procedure Date / Time	The date and time the procedure took place (e.g., the time the patient had their x-ray)  <i>* Default sort using this column</i>
Report	Selecting the attachment icon in this column, or double clicking anywhere on the row will open the Document Viewer, allowing users to view the report(s) associated with that accession
Image	Selecting the image icon in this column will launch the Image Viewer for the images associated with that accession
Procedure Description	Contains the description of the procedure(s) associated with that accession
Additional Information	Contains information regarding the modality, anatomic region and laterality of the procedures performed as part of this accession  <i>Note: this information displays in an arbitrary order and may not be available, or only partially available for some accessions</i>
Report Status	Indicates the status of the document or note (e.g., Amended or final). The Amended (A) status is highlighted in <b>bold red</b>  Only the most recent status of a document is displayed in the portlet  For a report with a status of 'Withdrawn', row detail displays but no attachment is available. If attachment is required, contact the originating organization
Organization	The organization where the procedure(s) were performed
Accession Number	Accession number for the DI procedure(s)

### Diagnostic Imaging Data Elements




## Preferences

By default, the Diagnostic Imaging portlet shows all available columns. You can set preferences for the portlet list (with the exception of changing the columns to be displayed) using two methods.

- A. Adjust preferences directly on the temporary list
  - Adjust the width of any column ([Column Width](#))
  - Sort the list by any column in ascending or descending order ([Sorting](#))
  - Filter the list by any column, with the exception of the Attachments column ([Filtering](#))




*Note:* Above preferences are not saved after navigating away from the portlet.

- B. To permanently personalize the list, select User Preferences button 
  - Change the order in which the columns are displayed ([Change the Order of Displayed Columns](#))
  - Select which column should be used as the default sort ([Change the Default Sort Column and Sort Order](#))
  - Reset to system defaults ([Reset Preferences to System Defaults](#))




*Note:* To print the list of DI Reports, select Print  ([Printing from List Views](#))

## Viewing Information about Diagnostic Imaging Reports and Images

In the Patient Care Views navigation bar:

- Select  **Summary View** to view the condensed **Diagnostic Imaging** portlet
- Select  **Diagnostic Imaging** or  **Summary List View** to view the full-sized portlet

To view additional information about a study:

1. Print the contents of the DI portlet using Print 
2. By default, the portlet is sorted in descending order by procedure date/time. Each row item is one accession number
3. Select Report  to view the report in the Document Viewer
4. Select Image  to view the related diagnostic imaging study in the Image Viewer
5. Hover over the Procedure Description to view the procedure names for each report or study associated with the accession. Each line of the bulleted tooltip is associated with one report or image
6. Additional information such as the modality, anatomic region, and laterality display when provided by the source system. The bulleted tooltip shows one row per image and/or document
7. Reports having a status of Amended are highlighted in red typeface

8. One or more procedures may be associated with an accession number


Procedure Date/Time	Report	Image	Procedure Description	Additional Information	Report Status	Organization	Accession
23 Mar 2018 08:30			LASER SURF-RINGUINAL UTF16		Final	St Michaels Hospital	ACC UTF16.20180323173900
13 Jul 2017 15:25			INTRAVASCU-LLQ; INTRAVASCU-LLQ; INTRA...	(Intravascular Ultrasound, Left lower quadra...	Amended (A)	St Michaels Hospital	ACC IM R2.P1.20171220-0022
23 May 2017 15:51			INTRAVASCU-LLQ; INTRAVASCU-LLQ	(Intravascular Ultrasound, Left lower quadra...	Amended (A)	St Michaels Hospital	ACC IM R2.P1.20171220-0022
05 Apr 2017 02:17			DIGITAL RA-RADIUSULNAL; DIGITAL RA-RA...	(Left, Digital Radiography, Radius and ulna)	Preliminary	St Michaels Hospital	ACC IM R2.P1.20171220-0020
16 Feb 2017 00:42			ULA-SIGMOID; INTRAOacula-SIGM...	(Intraocular Lens Data, Sigmoid colon)	Preliminary	St Michaels Hospital	ACC IM R2.P1.20171220-0019
26 Dec 2016 23:08			RADIO FLUO-SCJOINTR; RADIO FLUO-SCJOI...	(Sternoclavicular joint, Radio Fluoroscopy, Ri...	Final	St Michaels Hospital	ACC IM R2.P1.20171220-0018
06 Nov 2016 17:34			RADIOGRAPH-INTMAMMARYAR; RADIOGRA...	(Internal mammary artery, Radiographic ima...	Final	St Michaels Hospital	ACC IM R2.P1.20171220-0017

Procedure Description	Additional Information	Report Status	Organization	Accession Number
LASER SURF-RINGUINAL UTF16		Final	St Michaels Hospital	ACC UTF16.20180323173900
INTRAVASCU-LLQ; INTRAVASCU-LLQ; INTRA...	(Intravascular Ultrasound, Left lower quadra...	Amended (A)	St Michaels Hospital	ACC IM R2.P1.20171220-0022
INTRAVASCU-LLQ; INTRAVASCU-LLQ	(Intravascular Ultrasound, Left lower quadra...	Amended (A)	St Michaels Hospital	ACC IM R2.P1.20171220-0022
DIGITAL RA-RADIUSULNAL; DIGITAL RA-RA...	(Left, Digital Radiography, Radius and ulna)	Preliminary	St Michaels Hospital	ACC IM R2.P1.20171220-0020
INTRAOacula-SIGMOID; INTRAOacula-SIGM...	(Intraocular Lens Data, Sigmoid colon)	Preliminary	St Michaels Hospital	ACC IM R2.P1.20171220-0019
RADIO FLUO-SCJOINTR; RADIO FLUO-SCJOI...	(Sternoclavicular joint, Radio Fluoroscopy, Ri...	Final	St Michaels Hospital	ACC IM R2.P1.20171220-0018
RADIOGRAPH-INTMAMMARYAR; RADIOGRA...	(Internal mammary artery, Radiographic ima...	Final	St Michaels Hospital	ACC IM R2.P1.20171220-0017
HEMODYNAMI-CEREBHEMISPHEREL; HEMO...		Final	St Michaels Hospital	ACC IM R2.P1.20171220-0016
MAGNETIC R-LLQ; MAGNETIC R-LLQ		Final	St Michaels Hospital	ACC IM R2.P1.20171220-0015
INTRAVASCU-BILEDUCT; INTRAVASCU-BILE...	(Intravascular Optical Coherence Tomograph...	Final	St Michaels Hospital	ACC IM R2.P1.20171220-0014
RESPIRATOR-ILIACVL; RESPIRATOR-ILIACVL	(Iliac vein, Left, Respiratory Waveform)	Final	St Michaels Hospital	ACC IM R2.P1.20171220-0013

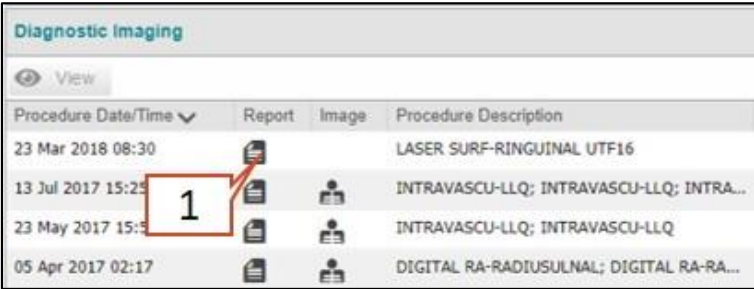
**Diagnostic Imaging Reports: Supported Operations**

**Viewing Reports in the Report Viewer**

To view reports:

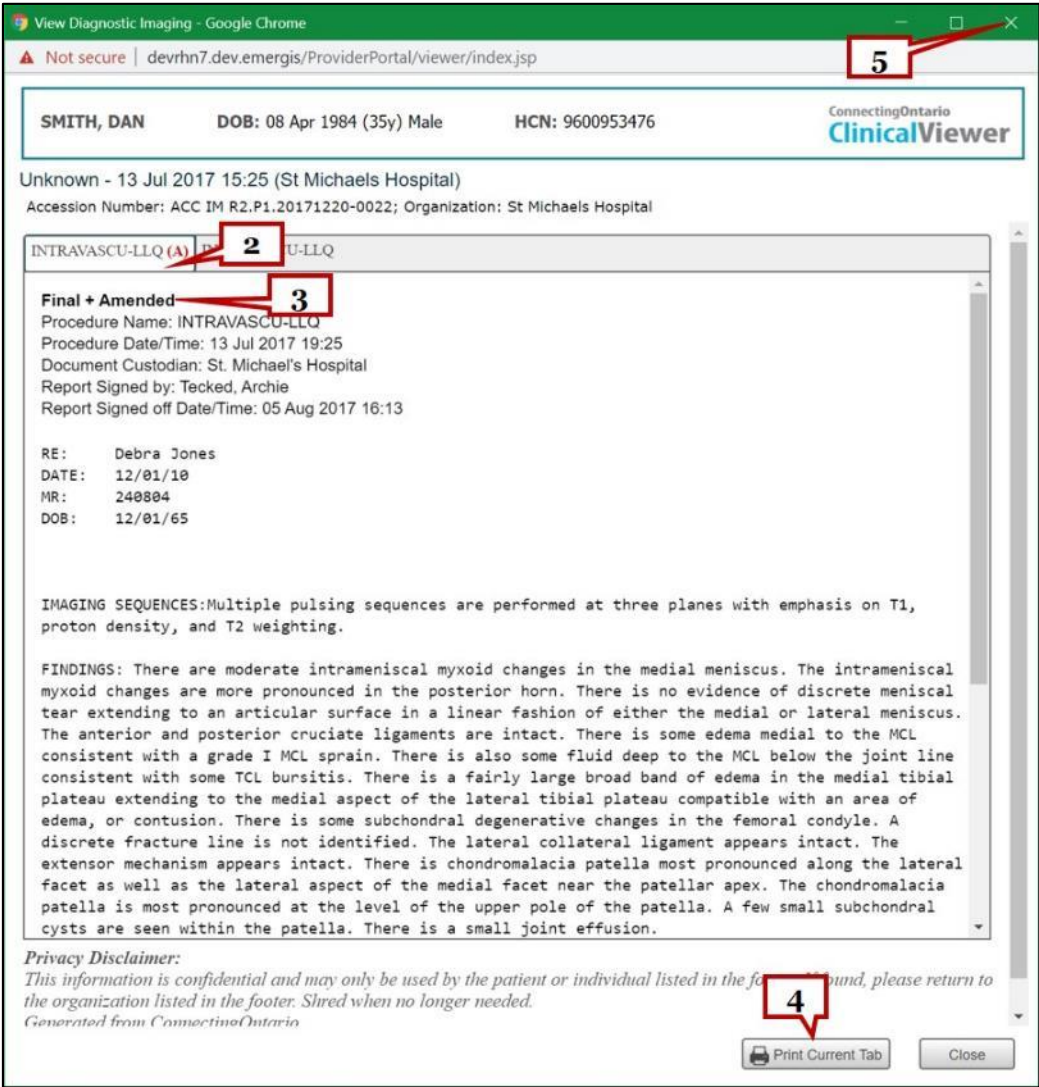
1. Select Report  in the appropriate row. The Document Viewer appears in a separate window, and contains a tab for each report
2. Each report is visible on its own tab
3. Amended reports are displayed with a red reporting status label and the Amended label
4. Print the report using the Print Current Tab button

5. Close the window using the Close button or the X at the top right of the window



Procedure Date/Time	Report	Image	Procedure Description
23 Mar 2018 08:30			LASER SURF-RINGUINAL UTF16
13 Jul 2017 15:25	<b>1</b>		INTRAVASCU-LLQ; INTRAVASCU-LLQ; INTRA...
23 May 2017 15:5			INTRAVASCU-LLQ; INTRAVASCU-LLQ
05 Apr 2017 02:17			DIGITAL RA-RADIUSULNAL; DIGITAL RA-RA...

**Viewing Diagnostic Imaging Reports: Supported Operations**



View Diagnostic Imaging - Google Chrome

Not secure | devrhn7.dev.emergis/ProviderPortal/viewer/index.jsp **5**

SMITH, DAN    DOB: 08 Apr 1984 (35y) Male    HCN: 9600953476    ConnectingOntario ClinicalViewer

Unknown - 13 Jul 2017 15:25 (St Michaels Hospital)  
Accession Number: ACC IM R2.P1.20171220-0022; Organization: St Michaels Hospital

INTRAVASCU-LLQ (A) **2** U-LLQ

**Final + Amended** **3**

Procedure Name: INTRAVASCU-LLQ  
Procedure Date/Time: 13 Jul 2017 19:25  
Document Custodian: St. Michael's Hospital  
Report Signed by: Tecked, Archie  
Report Signed off Date/Time: 05 Aug 2017 16:13

RE: Debra Jones  
DATE: 12/01/10  
MR: 240804  
DOB: 12/01/65

IMAGING SEQUENCES: Multiple pulsing sequences are performed at three planes with emphasis on T1, proton density, and T2 weighting.

FINDINGS: There are moderate intrameniscal myxoid changes in the medial meniscus. The intrameniscal myxoid changes are more pronounced in the posterior horn. There is no evidence of discrete meniscal tear extending to an articular surface in a linear fashion of either the medial or lateral meniscus. The anterior and posterior cruciate ligaments are intact. There is some edema medial to the MCL consistent with a grade I MCL sprain. There is also some fluid deep to the MCL below the joint line consistent with some TCL bursitis. There is a fairly large broad band of edema in the medial tibial plateau extending to the medial aspect of the lateral tibial plateau compatible with an area of edema, or contusion. There is some subchondral degenerative changes in the femoral condyle. A discrete fracture line is not identified. The lateral collateral ligament appears intact. The extensor mechanism appears intact. There is chondromalacia patella most pronounced along the lateral facet as well as the lateral aspect of the medial facet near the patellar apex. The chondromalacia patella is most pronounced at the level of the upper pole of the patella. A few small subchondral cysts are seen within the patella. There is a small joint effusion.



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Generated from ConnectingOntario









**4** Print Current Tab    Close

**Viewing Diagnostic Imaging Reports: Supported Operations**

## Viewing Images in the Image Viewer

To view diagnostic images:

1. Select Image  in the appropriate row. The Image Viewer is launched in a separate window and automatically logs you in. It displays the image or images along with the associated radiology report.  
*Note:* the Image Viewer will contain images from one accession only
2. Learn about the Image Viewer by selecting Help
3. If multiple studies are included in the accession, selecting the Study Information button lets you choose another study to view
4. Print the associated radiology report using the Print Report button  
*Note:* Reports from the Image Viewer will not contain a patient header or footer
5. Select the X to close the report or image panel
6. Display the image toolbar by Selecting the right arrow 

Diagnostic Imaging			
View			
Procedure Date/Time	Report	Image	Procedure Description
23 Mar 2018 08:30			LASER SURF-RINGUINAL UTF16
13 Jul 2017 15:25			INTRAVASCU-LLQ; INTRAVASCU-LLQ; INTRA...
23 May 2017 15:51			INTRAVASCU-LLQ; INTRAVASCU-LLQ
05 Apr 2017 02:17			DIGITAL RA-RADIUSULNAL; DIGITAL RA-RA...



**Riona, BUSBY**  
ID: H0602614 | Female | Dob: Jan 9, 1965

**Calcaneus Bilateral 2 Views**  
Jan 25, 2018 11:26 AM (274.001)

**Print Report** 4

**Institution** PRHC  
**Referring Physician** -1  
**Patient Name** ADULT TEST  
**Patient ID** K000205PRHC  
**Date of Birth** Jan 1, 1965  
**Sex** Female  
**Accession** 274.001  
**Study Date** Jan 25, 2018 11:26 AM  
**Report Date** Jan 25, 2018 11:26 AM  
**Status** Complete - Unverified

**Diagnosis**  
Exam Date: 25/Jan/2018  
Exam Name: Calcaneus Bilateral 2 Views  
COPIES TO: PROVIDER, T TEST; TEST, DR. SCOOPY-DOO  
ORDERING DR: T T. PROVIDER, SUFFIX1, SUFFIX2  
Patient Name: TEST\_ADULT UNIT# K000205 HC# 4444444444  
DOB: 1/Jan/1965 Sex: F  
Patient Address: 1 TEST STREET  
PETERBOROUGH ON K91 3V7

1: T1008 Ankle AP R 6  
2: T1074 Ankle OBL R 5  
3: T1008 Ankle LAT R

Viewing Images in the Image Viewer

## Printing

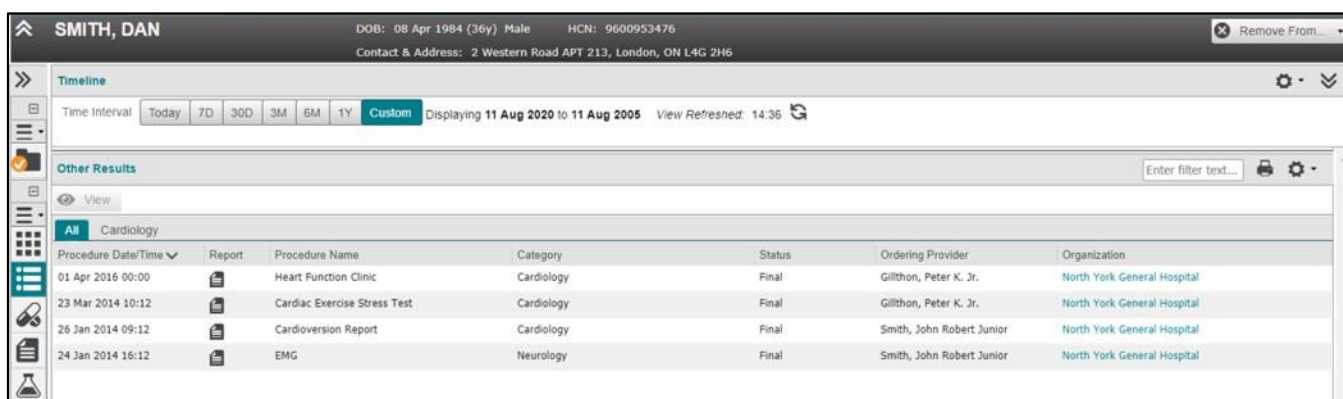
To print the Diagnostic Imaging portlet list, select Print  ([Printing from List Views](#)).





## Other Results Portlet

The Other Results portlet includes results not available in other portlets, including select Diagnostic Imaging reports that are not available from the Diagnostic Imaging Common Service (DI CS). The Other Results portlet holds any procedure categorized by program and in some instances discipline, depending on how the organization has mapped the document.

This portlet has two tabs:

1. **All** tab - displays all reports/results
2. **Cardiology** tab – displays any results categorized as ‘Cardiology’



Procedure Date/Time	Report	Procedure Name	Category	Status	Ordering Provider	Organization
01 Apr 2016 00:00		Heart Function Clinic	Cardiology	Final	Gilthon, Peter K. Jr.	North York General Hospital
23 Mar 2014 10:12		Cardiac Exercise Stress Test	Cardiology	Final	Gilthon, Peter K. Jr.	North York General Hospital
26 Jan 2014 09:12		Cardioversion Report	Cardiology	Final	Smith, John Robert Junior	North York General Hospital
24 Jan 2014 16:12		EMG	Neurology	Final	Smith, John Robert Junior	North York General Hospital

Other Results Portlet

## Information Available in Each View

The available information columns in each view are detailed below. By default, the full-size portlet (as displayed above) shows all available columns. A checkmark ✓ indicates which ones are displayed by default. Available columns that can be added temporarily or permanently are indicated by an A.

Column	Summary View – Condensed Portlet	Summary List and Individual Portlet View	Description
Procedure Date / Time	✓	✓	The date and time the procedure took place (e.g. the time the patient had their EKG)  <i>* Default sort using this column</i>
Attachments (no label)	✓	✓	Attachment icon appears when documents are available for viewing  Select View with the row selected or select the attachment icon to open the Document Viewer with the document of interest displayed ( <a href="#">Viewing Documents</a> )
Procedure Name	✓	✓	Name of the procedure that was performed
Category	A	✓	Procedure category (e.g., "Cardiology", "Neurophysiology", etc.)
Status	A	✓	Indicates the status of the document or note (e.g., preliminary, final, etc.). The amended status appears in <b>bold red</b>  Only the most recent status of a document display in the portlet  For a report with a status of 'Withdrawn', row detail displays but no attachment is available. If attachment is required, contact the originating Organization
Ordering Provider	A	✓	Provider who ordered the test, not the person who dictated the report
Organization	A	✓	The facility or organization where the document or note was created. Select the link to see additional information

Column	Summary View – Condensed Portlet	Summary List and Individual Portlet View	Description
Encounter Date/Time	A	A	Corresponds to the admission date/time of the hospital visit for which this document was created  This column is hidden by default. See <a href="#">Hide or Show Columns</a>

---


### Other Results Data Elements


## Preferences

By default, the full-size Other Results portlet shows all available columns except Encounter Date/Time. You can set preferences for the portlet list using two methods.

- Temporarily adjust preferences directly on the list
  - Adjust the width of any column ([Column Width](#))
  - Hide any of the columns from the display ([Hide or Show Columns](#))
  - Sort the list by any column in ascending or descending order ([Sorting](#))
  - Filter the list by any column, with the exception of the Attachments column ([Filtering](#))

*Note:* Above preferences are not saved after navigating away from the portlet

- To personalize the list (permanent changes) Select User Preferences 
  - Change which columns are displayed ([Hide or Display Columns](#))
  - Change the order in which the columns are displayed ([Change the Order of Displayed Columns](#))
  - Select which column should be used as the default sort ([Change the Default Sort Column and Sort Order](#))
  - Reset to system defaults ([Reset Preferences to System Defaults](#))

*Note:* To print the list of Other Results, select Print  ([Printing from List Views](#))

## Community

The Community portlet displays a list of community referrals and other information from LHIN Home and Community Care Services, for the selected patient within the time period selected on the timeline. Any referral that **started**, **finished**, or is **ongoing** during the selected timeline range displays.

### Community Portlet

## Information Available in Each View

The available information columns in each view are detailed below. By default, the full-size portlet (as displayed above) shows all available columns. A checkmark ✓ indicates which ones are displayed by default. Available columns which can be added temporarily or permanently are indicated by an A.

Column	Summary View – Condensed Portlet	Summary List and Individual Portlet View	Description
Referral Start Date	✓	✓	Referral date to LHIN Home and Community Care Services
Referral Type	✓	✓	Type of referral (e.g., Long Term Placement, Short Stay Respite, Rehab, etc.)
Reason for Referral	✓	✓	Reason for the referral
Service Details	✓	✓	Attachment icon appears when documents are available for viewing



Column	Summary View – Condensed Portlet	Summary List and Individual Portlet View	Description
			Select View with the row chosen or select the attachment icon to open the Document Viewer with the document of interest displayed ( <a href="#">Viewing Documents</a> )
Status	A	✓	Displays <b>Amended (A)</b> if any of the documents available under service details have been amended. Otherwise, this column is left blank
Organization	A	✓	The facility or organization associated with the referral
Referral Close Date	A	✓	End date for the referral <i>Note:</i> The presence of a referral close date can indicate that the referral is no longer active

### Community Data Elements

## Service Details

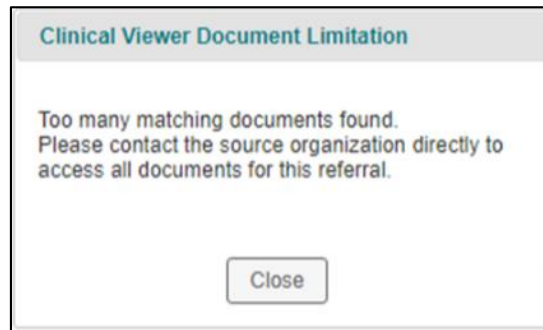
The Community portlet displays information from LHIN Home and Community Care Services including documents such as:

- Medical Equipment
- Service Details
- LTC Placement Details
- Client Risk
- LTCH Service Details
- Medical Supplies
- Client Safety Issues

Double click a referral entry to view the details contained in the referral form.

*Note:* Referral assessment documents are not displayed in the Community portlet; this document type is found in the Documents/Notes portlet.

If there are more than 20 documents, the following message displays:




### Too many matching documents


## Preferences

By default, the Community portlet shows all available columns in the list and component views. You can set preferences for the portlet list using one of two methods.












- A. Temporarily adjust preferences directly on the list
  - Adjust the width of any column ([Column Width](#))
  - Hide any of the columns from the display ([Hide or Show Columns](#))
  - Sort the list by any column in ascending or descending order ([Sorting](#))
  - Filter the list by the date column ([Filtering](#))







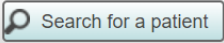






*Note:* Above preferences are not saved after navigating away from the portlet











- B. To permanently personalize the list, select User Preferences 
  - Change which columns are displayed and the order they are in ([Modify Columns](#))
  - Select which column should be used as the default sort ([Change the Default Sort Column and Sort Order](#))
  - Reset to system defaults ([Reset Preferences to System Defaults](#))









*Note:* To print the Community portlet list, select Print  ([Printing from List Views](#))

# Icons

Icon	Name	Description
	Add To...	Select to open a window to choose a list e.g. My Patients List, to which to add the current patient
	Remove From...	Select to open a window to choose a list e.g. My Patients List, from which to remove the current patient
	Alert/Warning	Indicates critical data that should be reviewed
	Attachment	Select to open attachment in the Document Viewer
	Calendar	Open the calendar window to select a date
	Comment	There is a comment attached to the item, or the full text is available. To view the comment, hover the pointer over the icon
	Delete	Remove the patient from My Patients List
	Drop-down	Select to open a menu
	Expand row	Expand the data to show all the rows, or all details
	Collapse row	Collapse the data to hide the rows, showing only the main or heading row
	Expand All/Collapse All	Expand or collapse all rows on the component. Select this icon to toggle between showing and hiding the rows

Icon	Name	Description
	Information	Show additional information or notes
	Loading	Lab Portlet - Retrieving new data...
	Result Comments	Lab Portlet – test result comments available
	Print	Select to open the print preview window to view and/or print the chosen list view
	Print	Select to open the print preview window to view and/or print attachments from the Document Viewer
	Refresh	Redisplay the list with current data
	Search for a patient	Select to open Patient Search and Selection dialog
	Show/Hide	Show more or less data on the patient banner
	Sort Order	Data is sorted on this column in ascending ( ▲ ) or descending ( ▼ ) order
	Previous/Next	Timeline - show the previous or next time range on the timeline
	End and Beginning Point Sliders	Timeline - beginning and ending termination point on the timeline
	Today	Timeline - indicator for today's date and time on the timeline
	Collapse	Timeline – minimizes the timeline

Icon	Name	Description
	Expand	Timeline – expands a minimized timeline to its full size
	Inpatient Visit	Timeline – a teal line marks an inpatient visit on the timeline. Select to adjust the timeline to become two weeks before and two weeks after selected the visit
	Ambulatory Visit	Timeline – marks an ambulatory (outpatient) visit on the timeline. Select to adjust the timeline to become two weeks before and two weeks after selected the visit
	Emergency Department Visit	Timeline – marks an ED visit on the timeline. Select to adjust the timeline to become two weeks before and two weeks after selected the visit
	User Preferences (Options)	Select to open Configure My Grid dialog and set user preferences
	View	Select to view patient record in Patient Care tab
	View	Select to view record details
	Visits/Encounters	Icon for the Visits/Encounters and Summary Reports portlet
	Documents/Notes	Icon for the Documents/Notes portlet
	Lab and Pathology Results	Icon for the Lab and Pathology Results portlet

Icon	Name	Description
	DI Reports	Icon for the Diagnostic Imaging portlet, Icon for Diagnostic Images
	Other Results	Icon for the Other Results portlet
	Community	Icon for the Community portlet
	Edit Mode	Navigation bar – Select to enter Edit Mode for creating & editing custom views
	View Mode	Navigation bar – Select to enter View Mode (from Edit Mode)
	Collapse Patient Data Views	Navigation bar – Select to view only icons
	Expand Patient Data Views	Navigation bar – Select to view icons and text description
	Options Menu	Available in components when creating or editing a three column custom view

# Troubleshooting

## 1. Data is loading slowly – what can I do?

The greater the timeline range selected, the longer it takes to load data. Try to reduce your timeline by:

- changing the interval (e.g., from 1 year to 4-6 months)
- moving the sliders inwards
- Selecting directly on an encounter

## 2. How do I know what data is available in the ConnectingOntario ClinicalViewer?

Refer to the [Data Summary](#) (available through the Links menu and in the ClinicalViewer header)

## 3. Why can't I print my list of Lab Results?

Printing of Lab lists is not supported by OLIS - only full reports can be printed. (Full reports are available in the Individual Portlet view or the Summary List View)

## 4. I want to override the consent directives, but the button has disappeared.

- Use the Refresh button on the Timeline to refresh the ClinicalViewer data
- Leave patient context and return (go to My Workspace and select the patient again OR search for the patient again)

*Notes:*

- Once consent has been overridden, the override reason cannot be changed for a minimum of 4 hours (OLIS and DHDR data) and potentially up to 24 hours (acCCR data)
- As per policy, you cannot override a consent directive concerning data available in the Diagnostic Imaging portlet

## 5. Can I find a record of my patient's allergies in the ClinicalViewer?

Not in the current release. This may be available in the future

## 6. Why isn't there an attachment available for a document row?

If a result is withdrawn, the attachment is not available

# Contacting Support

You can contact the eHealth Ontario Service Desk for assistance at 1-866-250-1554. If you are calling about a particular error message you received, be sure to have the error message available so that you can supply the error ID.



**Sample error message**



# Frequently Asked Questions

## Patient Lists

**Question: Can you clarify what defines a Recent Patient?**

**Answer:** My Recent Patients List is system generated. The system automatically creates a history of any patients that were viewed in the ClinicalViewer by the user.

**Question: How do I add a patient to My List?**

**Answer:** Use the "Add to" button from My Recent Patients List.

**Question: If my patient is not in My Patients List, how do I add the patient to the My Patients List?**

**Answer:** You will need to search for the patient and add the patient from Patient Care tab or return to the My Patients List and add the patient there.

**Question: There are hundreds of patients on my list; is there an option to search for patients within my list?**

**Answer:** You can use the filter and sort options within the list to find a patient on the list.

**Question: In 'My Recent Patients List' can I 'show/hide' the patients that I have viewed? Just for the purpose of protecting patient privacy. Is 'hide' a default?**

**Answer:** My Recent Patient List follows the usage of the user and has no show /hide functionality.

## Patient Search

**Question: When searching by MRN, are both organization and MRN required?**

**Answer:** Yes

**Question: Do you enter the version code for the HCN?**

**Answer:** No

**Question: What LHIN Home and Community Care Services identifier is being by the ClinicalViewer: BRN or the CHRIS Client ID?**

**Answer:** CHRIS Client ID is being collected, not the BRN, as not all LHIN Home and Community Care Services clients have a BRN.

**Question: Does the system know that I am at Sunnybrook Hospital and does it default the organization to the search?**

**Answer:** The patient search function just puts the patient into context regardless of what you search by. Once the search is complete, that user has access to all patient information including information contributed from other organizations.

**Question: What happens if I spell the patient's name wrong in the Advanced Search?**


**Answer:** The patient record may not show up.

**Question: I used to be able to search for patients, but I can no longer find that option?**


**Answer:** Starting with ConnectingOntario Release 10.6, organizations may optionally disable the ability for users to search for patients within the ClinicalViewer. In this case, you must search for a patient within your HIS or other integrated clinical application and launch the ClinicalViewer with that patient in context.

## Timeline

**Question: Do ambulatory visits include LHIN Home and Community Care services visits?**

**Answer:** No, the ambulatory visits that appear on the Timeline include only hospital outpatient visits. They are represented by this icon: 

**Question: How do you know there is an inpatient visit? What triggers this?**

**Answer:** The data received for the encounter determine what is displayed on the Timeline. Inpatient visits are represented by this icon: 

## Other Results Portlet

**Question: Can I see Cardiology reports?**

**Answer:** This is dependent on what an organization sends. Generally, if the report is in an electronic format then it can be captured in ConnectingOntario.

**Question: Is the ClinicalViewer available on mobile devices and tablets?**

**Answer:** The ClinicalViewer can be used on a tablet as long as it can access a web interface (HTML), but this is not officially supported. Mobile interfaces have not yet been developed and the ClinicalViewer is not currently supported on mobile devices.

## Lab and Pathology Portlet

**Question: What is “Ordered As”?**

**Answer:** The user sees the lab data as organized by panel/test request grouping as ordered by the physician.

**Question: What is the difference between Test and Ordered As?**

**Answer:** Those are columns in the OLIS portlet. Test corresponds to the name of the test results whereas Ordered As is the name used to request the test or group of tests. The test request is the parent of the result.

**Question: How can I manipulate the OLIS view to make it work for me?**

**Answer:** As with any portlet, you can utilize the Preferences icon to re-organize the column order, select which columns to display and set a default sort order for the list display. Unique to the OLIS portlet, you can set the data display order and turn on the trending graph column for the flowsheet display. Also unique to the OLIS portlet, you can set a default graph type (bar or line) and enable data labels for the graph display.

You can also reset the system default from the Preferences dialog.

**Question: Is the Lab linked to Visit or Patient?**

**Answer:** The Labs portlet is linked to each patient.

## Consent

**Question: During an emergency situation, I put the name Donald Duck in the SDM fields and overrode consent to view the patient record. What happens now?**

**Answer:** This dialog simply documents the reason and the SDM; the ClinicalViewer cannot stop the overriding of consent. However, this action is logged and OLIS would take issue with this.

**Question: Certain patients, e.g., children, may have more than one SDM, but the ClinicalViewer only allows for one entry. What if there is a conflict with some SDM's saying yes and some saying no?**

**Answer:** This is only secondary documentation – the override should be fully documented as per your organization's policies for documentation of consent.

**Question: If a patient has a consent directive (any type of blocked data) in the Community portlet, can the Community information be displayed in the Visits and Encounters portlet?**

**Answer:** No, community referrals are only displayed in the Community portlet. This aligns with the decision made to have the Community data separate. In addition, the Community information would be blocked no matter what portlet it is displayed in. If a consent directive is applied to Community information, the only way to view it is to complete a consent override.

## Navigation

**Question: Is there a way to search for a specific word or type of report widely in the system, e.g., ECG or ECO and find it?**

**Answer:** The ability to search or filter across all components is not available at this time. For now, you can essentially search within each portlet using the portlet-wide filtering capabilities. There is a filter text box on the

header of each portlet into which you can enter a string or strings (space delimited). This will filter the portlet to show only those rows in which the strings you have entered appear in any visible column.

**Question: Can I set up timelines for different types of portlets?**

**Answer:** No, the timeline drives all the portlets.

**Question: What date does the system use to know when the data was created? How do I know which date is being used when I am searching in the Timeline?**

**Answer:** The applicable date varies by portal as follows:

- Medications – Dispensed Date
- Documents/Notes – Document Date/Time
- Lab and Pathology Results – Collection Date/Time
- Visits/Encounters and Summary Reports – Date(s) the visit took place
- Diagnostic Imaging – Procedure Date/Time
- Other Results – Procedure Date/Time
- Community – Referral Start Date

**Question: Can I filter from the Summary view as well?**

**Answer:** As long as the column is displayed in the Summary view, yes.

**Question: How far back can I search for data?**

**Answer:** There is no restriction on how far back you can search. You can use the Custom time setting to search for any date or use the Timeline arrows to go back by time periods. Data from a given organization is only available going forward from the date that the organization began contributing to ConnectingOntario.

**Question: What type of browser is compatible with the ClinicalViewer?**

**Answer:** Microsoft Edge version 95 or higher and Google Chrome version 95 or later.

**Question: How are consent directives set up? And what is the framework?**

**Answer:** Consent directives are set up by the patient with the Privacy Officer or Information Custodian. There are multiple levels of consent directives available. If a consent directive is active for a patient, this is tracked and honoured in the ClinicalViewer. There is a robust consent framework with different types of consent directives such as:

- **Global:** Restricting access to all PHI in the Acute and Community Clinical Data Repository (acCCR) for that patient (except demographic data in the Client and Consent registries)
- **Domain:** Restricting access to all PHI in an application or domain (according to the directives registered in the application or domain), i.e. from OLIS in the Labs portlet
- **Health Information Custodian Record:** Restricting or allowing access to all PHI from a specific organization/facility for a specific patient
- **Health Information Custodian Agent:** All Agents - Restricting or allowing all users from a specific organization/facility to access the patient's PHI in the acCCR
- **(Single) Agent:** Restricting or allowing a specific user (individual person) to access the patient's PHI in the acCCR

**Question: Can I use a wildcard character (e.g., \* ) filter in the patient search or any type of search?**

**Answer:** No, ConnectingOntario does not allow wild character filter to avoid phishing for patient information. This is a privacy restriction to protect PHI.

**Question: Can I change the font size for all the text displayed, i.e., grow or shrink the font?**

**Answer:** Yes, but this capability is browser dependent

**Question: Can I resize the ClinicalViewer using the Zoom level option in the PC, or what other alternatives exist?**

**Answer:** Yes, you can zoom the ClinicalViewer up to 175%

**Question: If filtering by date provides the options before, after or equal to, is there an in between date filtering option, e.g., filter patient visit/encounters from November 4, 2013 to December 4, 2013 in the calendar box?**

**Answer:** You can use a combination of the before and after filters to accomplish this. You can also set the timeline to the desired date range.

**Question: Is patient context passed when searching via HIS?**

**Answer:** Yes, patient context is passed when searching via HIS.

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