



Sponsored Accounts | Physician Guide

OntarioMD/AFHTO QIDSS EPA Partnership Initiative

Version 1.0

Creating & Managing Sponsored Accounts

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Introduction

This guide will assist physicians seeking to sponsor Quality Improvement Decision Support Specialists’ (QIDSS), working on behalf of the Association of Family Health Teams of Ontario (AFHTO), access to the OntarioMD portal. The sponsorship process demonstrated herein is intended for the creation of a QIDSS-specific sponsored account which will:

- Provide QIDSS access to the OntarioMD portal
- Enable QIDSS users to view and complete an EMR Progress Assessment (EPA)

Sponsored Accounts

Physicians and Nurse Practitioner (NP) Leads who are registered users of the OntarioMD portal may sponsor other staff members to use OntarioMD products and services available on OntarioMD.ca, on their behalf. Sponsored accounts are linked with the user account of their sponsor.

EMR Progress Assessment (EPA)

The OntarioMD EMR Progress Assessment (EPA) is an online, evidence-based tool which enables clinicians to consider their current and desired level of EMR maturity across ten clinical areas. Access to the EPA is only available to registered users of the OntarioMD portal (www.ontariomd.ca). Upon logging into the OntarioMD portal, users can access the EPA and commence the assessment.

EMR maturity is assessed across six levels:

EMR MATURITY MODEL		
Level	Criteria	Capabilities
5	INTEGRATE	Use of portals, hubs, attachment to provincial e-health platforms sharing data from the EMR.
4	POPULATION DATA USE	Dashboarding of whole populations, acting upon the whole, performing population analysis at the practice level.
3	LOOK AHEAD / PREDICT	Reminders and alerts are used at the point of care. Searches are done regularly and scheduled for review.
2	EARLY DATA USE	Acting upon the output of episodic searches, quick entry tools, forms, calculators, etc.
1	ENTER DATA	Documentation occurs electronically. Progress notes, forms, and other documents are entered into the EMR.
0	PAPER	Processes are primarily paper-based.

The EPA employs the EMR Maturity Model as the basis for self-assessment across three functional areas:

Practice Management	Information Management	Diagnosis & Treatment Support
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These areas reflect critical aspects of practice and are comprised of 10 key measures—clinical activities which are at the core of practice workflow and patient care.

EMR Maturity Model Framework



In addition to offering clinicians a tool with which to assess EMR maturity, the EPA also provides the basis for the initiation of quality improvement activities intended to improve aspects of practice management and clinical efficiency. The current state provided by the EPA is useful in identifying areas of improvement (i.e., current level of EMR maturity) and charting a destination (i.e., desired level of EMR maturity).

EMR Practice Enhancement Program

The OntarioMD EMR Practice Enhancement Program (EPEP) is a complimentary provincial initiative which supports physicians seeking to optimize their EMR use and advance their EMR maturity. EPEP employs Practice Enhancement Consultants (PECs), expert EMR users who collaborate with physicians, clinical, and administrative staff to create an optimization plan which reflects unique practice priorities and goals, including:

- Improving EMR workflow efficiency
- Optimizing existing EMR functionality and mastering new processes
- Identifying and addressing data quality and standardization issues

For more information about the program, visit the [EPEP page of the OntarioMD portal](#). You can also contact OntarioMD to schedule a meeting with a Practice Enhancement Consultant.

EMR Practice Enhancement Program – Contact Information	
epep@ontariomd.com	1.866.339.1233

Quality Improvement Decision Support Specialist (QIDSS) Sponsorship

Sponsorship for Quality Improvement Decision Support Specialists (QIDSS) is part of the OntarioMD/AFHTO partnership initiative. The goal of this initiative is to allow QIDSS to complete the EPA in order to better understand EMR maturity within Ontario's Family Health Teams (FHTs).

Participating QIDSS will complete an EPA for each constituent practice group within a FHT. The responses from these EPAs will reflect the QIDSS interpretation of the average level of EMR maturity within each practice group. EMR Progress Assessments completed by participating QIDSS will not contain any information other than the perceived maturity of the practice group in question. No personal or identifying information regarding the physicians or staff working within the practices groups is collected.

Any research findings shared with the public (i.e., conference papers, presentations, symposia, etc.) will be communicated as aggregate data.

Support

Should you require technical assistance at any step in the sponsorship process, please contact:

OntarioMD Support	
Hours of Operation	Monday to Friday – 9am to 5pm
Telephone	1.866.744.8668
Email	support@ontariomd.com

For any questions regarding the OntarioMD-QIDSS partnership initiative, the EMR Progress Assessment, and/or the EMR Practice Enhancement Program please contact:

Program Support	
Contact	Jason Aprile
Telephone	1.866.339.1233 x.5391
Email	jason.aprile@ontariomd.com

Creating Sponsored Accounts

Login to OntarioMD Portal

The screenshot shows the OntarioMD login page. On the left, a 'Sign In' form is highlighted with a red border. It contains fields for 'USERNAME' (Username) and 'PASSWORD' (Password), a 'Remember Password' checkbox, and a blue 'SIGN IN' button. Below the form are links for 'Forgot your Username or Password?' and 'DON'T HAVE AN ACCOUNT?' with a purple 'SIGN UP' button. The main content area features a navigation menu with 'About Us', 'Products and Services', 'EMR Adoption Program', and 'Resource Library'. A search bar is located in the top right. Below the navigation is a large banner for the 'EMR: EVERY STEP CONFERENCE' in Toronto, ON, on September 22, 2016, with a 'Register Today' button. To the right of the banner are two smaller promotional boxes: 'HOSPITAL REPORT MANAGER' and 'PEER LEADER PROGRAM', both with 'More info >' links.

- URL: www.ontariomd.ca
- Sign in using your OntarioMD username and password
- If you cannot recall your credentials, click on “Forgot your Username or Password” to retrieve them

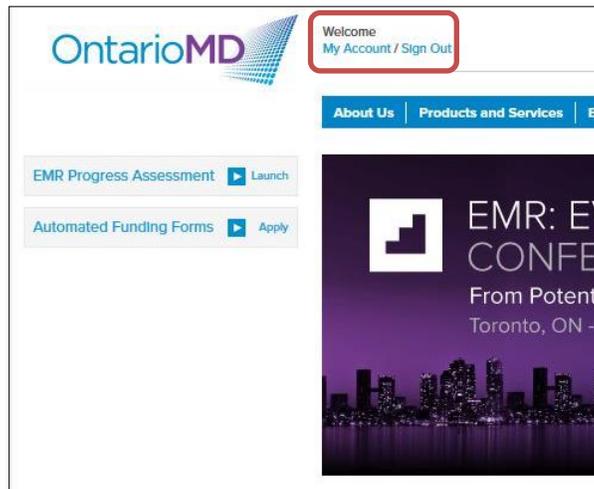
The screenshot shows the 'Forgot your Username or Password' form. It features the OntarioMD logo at the top. Below the logo is the title 'Forgot your Username or Password' and an 'Email Address' input field. Below the field are 'Submit' and 'Cancel' buttons. At the bottom, contact information for OntarioMD Support is provided, including phone numbers (1416 623 1248 and 1866 339 1233) and an email address (support@ontariomd.com). A note at the bottom states: 'Please include your OMA number in all email requests'.

The screenshot shows an error message on the 'Forgot your Username or Password' form. The error message states: 'Unable to retrieve user information for Indiana.Jones@gmail.com. If your account information does not include your email address, or you believe there may be a system error please contact OntarioMD Support at 1-866-339-1233, and we will validate your credentials manually.' The 'Email Address' field contains 'Indiana.Jones@gmail.com'. Below the field are 'Submit' and 'Cancel' buttons. At the bottom, contact information for OntarioMD Support is provided, including phone numbers (1416 623 1248 and 1866 339 1233) and an email address (support@ontariomd.com). A note at the bottom states: 'Please include your OMA number in all email requests'.

- Enter your email address to receive a link to create a new password
- **NOTE: This feature will only work when you enter the same email address you provided upon your initial registration. If the email address you enter does not match the one on file, you will receive an error message – as pictured above.**
- If you receive an error message, please contact [OntarioMD Support](#) to speak to a representative who will assist you in retrieving your username and/or creating a new password

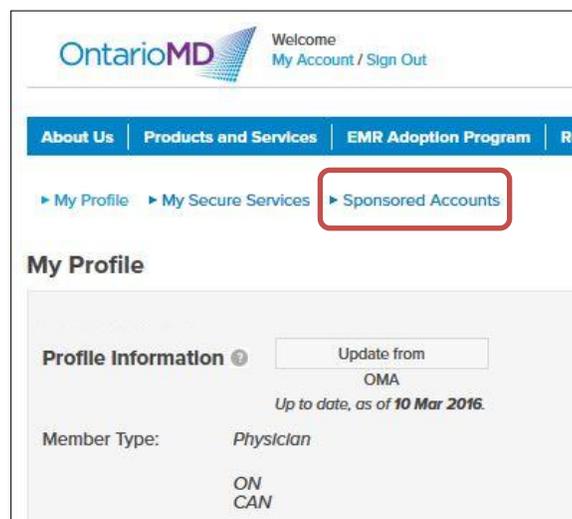
Access My Account Features

Access My Account



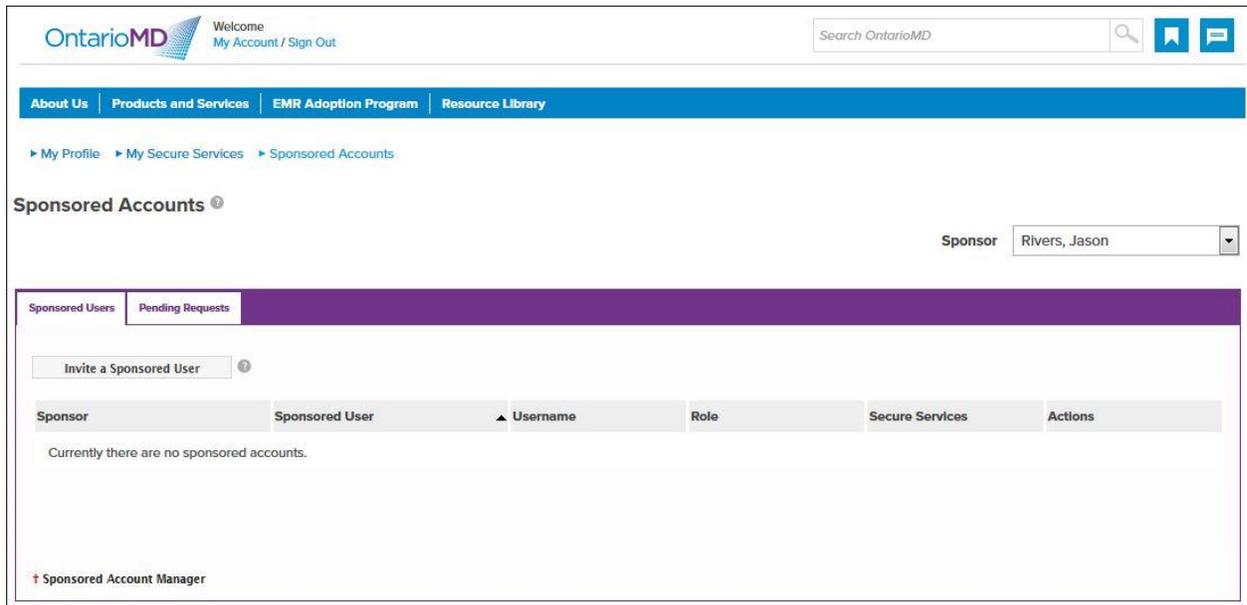
- Click on “My Account” – in the upper left quadrant of the page to access the My Profile page

Access Sponsored Accounts



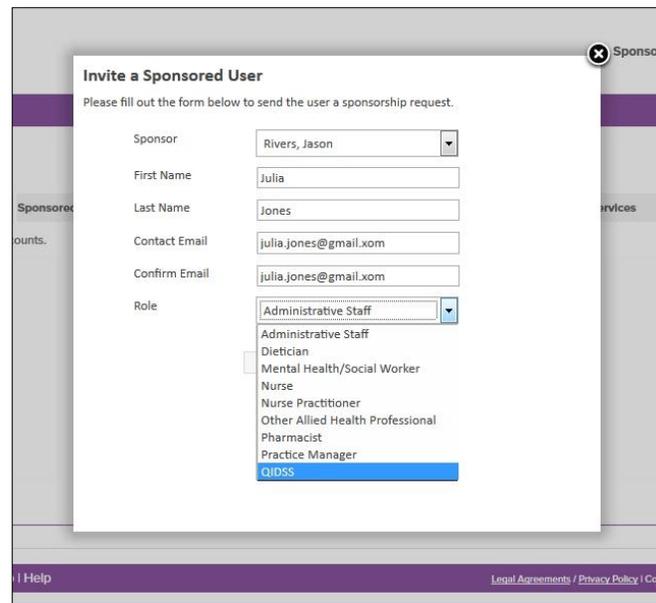
- Click on “Sponsored Accounts” – in the upper portion of the page to access the Sponsored Accounts page

Invite a Sponsored User



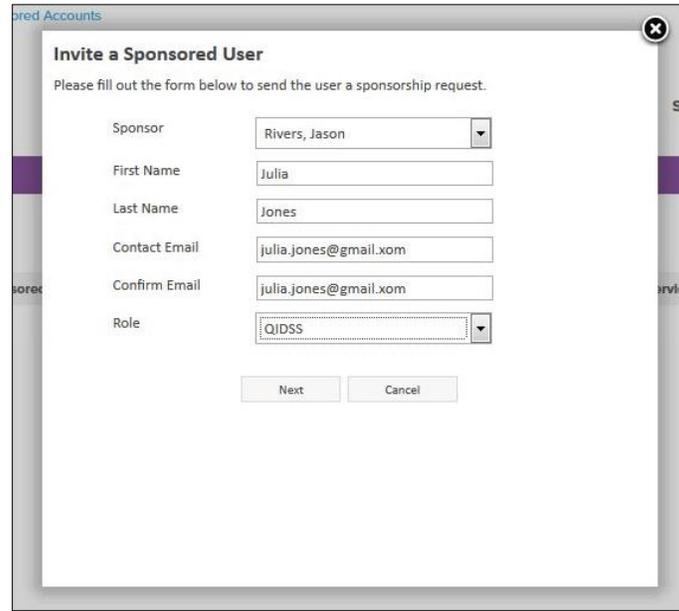
- **NOTE: The Sponsored Accounts page is where you will invite and manage all sponsored users**
- Click on “Invite a Sponsored User” to begin

Enter Sponsored User Information



- Complete the required fields and ensure the “QIDSS” role is selected

Confirm Sponsored User Information



Invite a Sponsored User

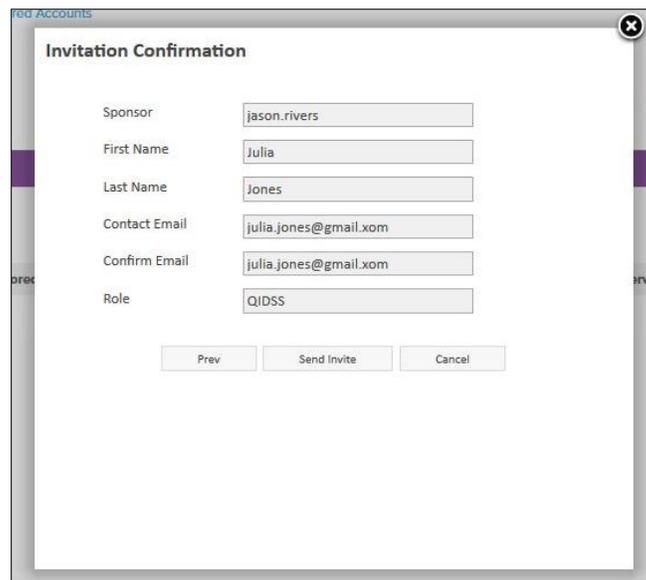
Please fill out the form below to send the user a sponsorship request.

Sponsor	Rivers, Jason
First Name	Julia
Last Name	Jones
Contact Email	julia.jones@gmail.xom
Confirm Email	julia.jones@gmail.xom
Role	QIDSS

Next Cancel

- Complete the fields
 - Ensure you have entered the correct information
 - Ensure you have selected the “QIDSS” role
 - Click on “Next”
-

Send Invitation



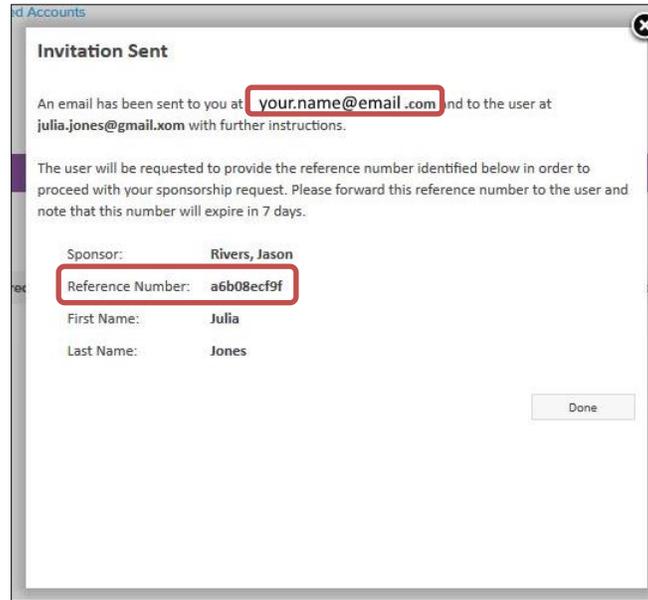
Invitation Confirmation

Sponsor	jason.rivers
First Name	Julia
Last Name	Jones
Contact Email	julia.jones@gmail.xom
Confirm Email	julia.jones@gmail.xom
Role	QIDSS

Prev Send Invite Cancel

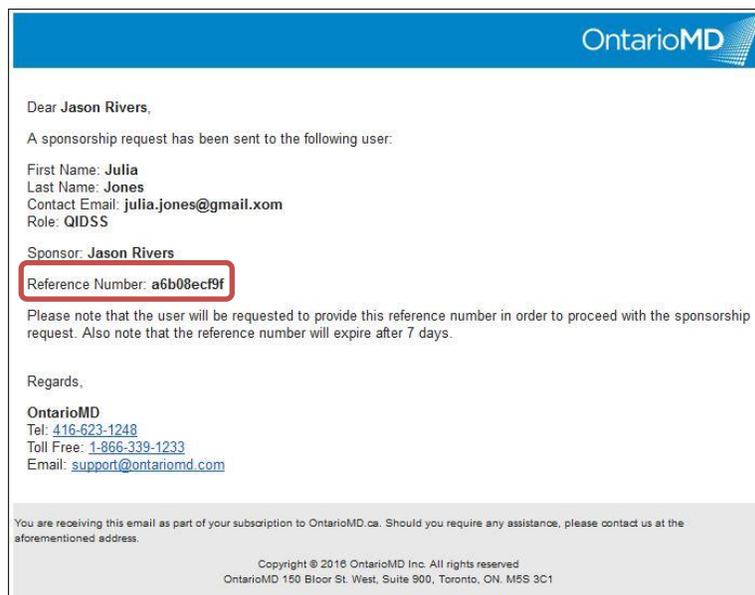
- Ensure you have entered the correct information
 - Click on “Send Invite”
-

Invitation Confirmation & Reference Number



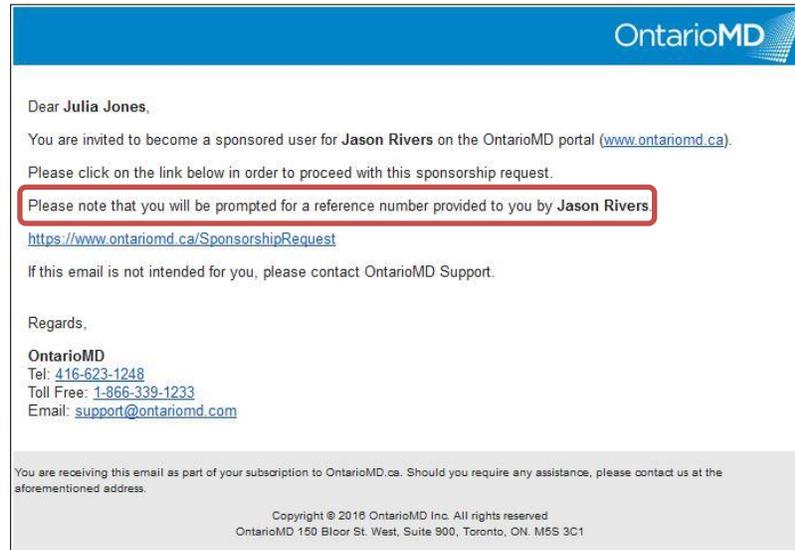
- The confirmation will indicate that a copy of the invitation has been sent to you at the email address you provided to OntarioMD at the time you registered for portal access
- **NOTE: You must share the provided reference number with the invited user in order for them to accept your invitation**

Physician Email Confirmation



- The email confirmation sent to the address on file for you will include information about the invited sponsored user—including the reference number

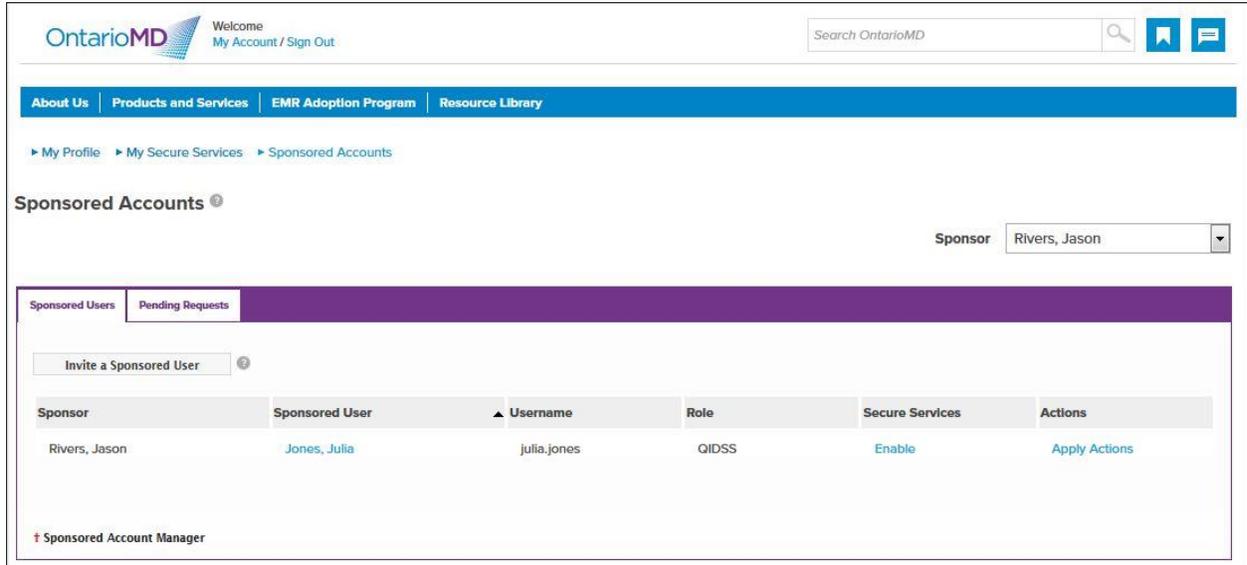
Sponsored User Email Invitation



- The sponsored user will receive an email with a link allowing them to accept the invitation
 - The sponsored user is advised that a reference number will be provided by the sponsoring physician
 - **NOTE: Sponsored account invitations are only valid for 24 hours –so it is important to ensure the reference number is shared promptly**
-

Managing Sponsored Accounts

Viewing Sponsored Users



OntarioMD Welcome My Account / Sign Out Search OntarioMD

About Us | Products and Services | EMR Adoption Program | Resource Library

My Profile | My Secure Services | Sponsored Accounts

Sponsored Accounts

Sponsor: Rivers, Jason

Sponsored Users | Pending Requests

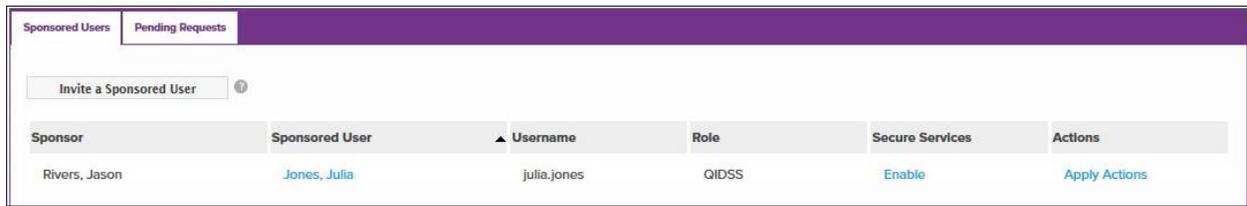
Invite a Sponsored User

Sponsor	Sponsored User	Username	Role	Secure Services	Actions
Rivers, Jason	Jones, Julia	julia.jones	QIDSS	Enable	Apply Actions

† Sponsored Account Manager

- The Sponsored Accounts page allows you to view and manage existing sponsored users, as well as track the status of pending requests

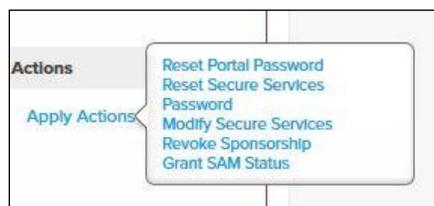
Sponsored Users Dashboard



- The sponsored users dashboard provides information about your sponsored users and allows you to manage their privileges
- **NOTE: QIDSS users do not require secure services to be enabled**
- To view the list of applicable actions click on “Apply Actions”



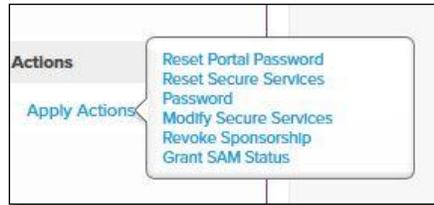
- The list of actions is extensive



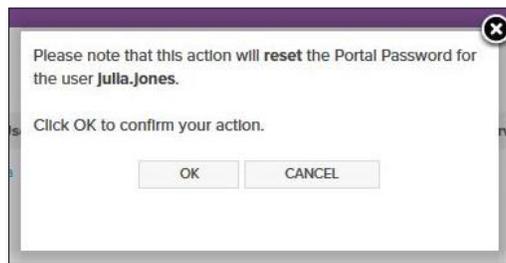
- For the purpose of the QIDSS initiative, only some of the actions are applicable and will be reviewed
- **NOTE: “Reset Secure Services Password”, “Modify Secure Services”, and “Grant SAM Status” are not applicable to QIDSS users and will not be demonstrated in this guide**
- Should you wish to learn more about these functions, please contact:

OntarioMD Support	
Hours of Operation	Monday to Friday – 9am to 5pm
Telephone	1.866.744.8668
Email	support@ontariomd.com

Sponsored User Dashboard > Apply Actions > Reset Portal Password



- Should one of your sponsored users forget their portal password, it can be reset from this dashboard
- Alternately, the sponsored user can contact OntarioMD Support to assist with this issue
- If you choose to assist the sponsored user, the process is as follows:
- Click on “Reset Portal Password”



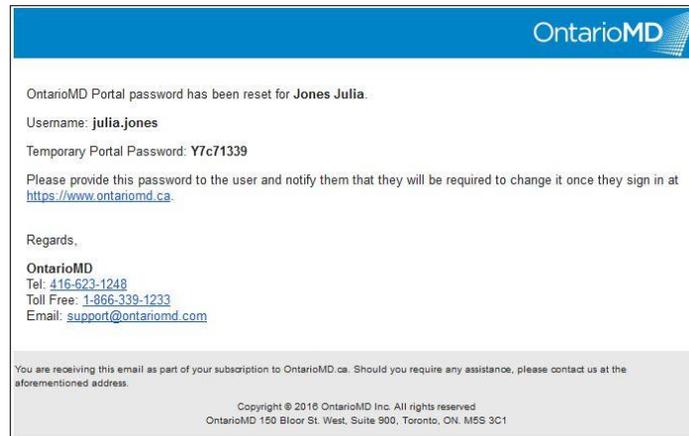
- Click on “OK” to complete the action



- The confirmation message includes a temporary password which must be shared with the sponsored user

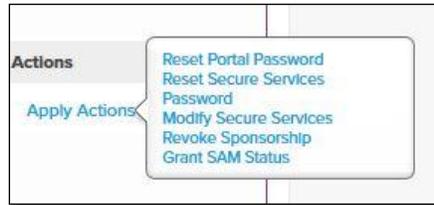


- A confirmation message will be displayed within the sponsored users dashboard

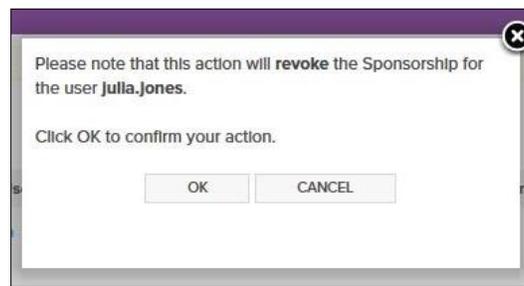


- An email will also be generated and sent to you confirming the password reset
 - You can share this with the sponsored user to provide them their temporary portal password
-

Sponsored User Dashboard > Apply Actions > Revoke Sponsorship



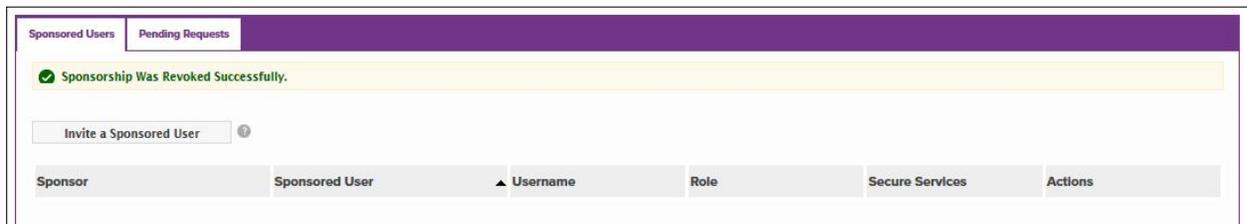
- Should you wish to revoke sponsorship:
- Click on “Revoke Sponsorship” for desired user
- **NOTE: Revoking sponsorship is a permanent action and cannot be undone. Once revoked, the user can be invited to create a new sponsored account, but cannot use the same username and email address associated with their previous sponsored account. Another username must be chosen and another email address must be provided.**



- Click on “OK” to confirm the action



- A confirmation message will be displayed within the Sponsored Users dashboard



- The sponsored user has been removed from the dashboard

Pending Requests Dashboard

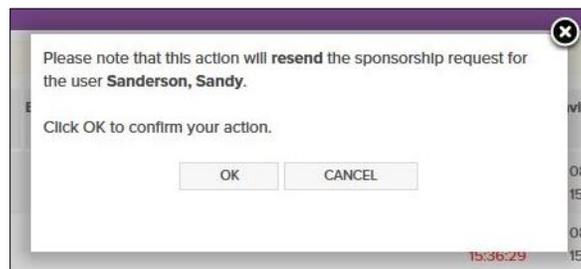
Sponsored Users		Pending Requests						
Sponsor	Sponsored User	Email	Role	Reference No.	Expiration Date	Invite Date	Invite By	Actions
Rivers, Jason	Laurence, Larry	larry.laurence@hotmail.com	QIDSS	4461517a05	08/23/16 15:39:47	08/22/16 15:39:47	Rivers, Jason	Apply Actions
Rivers, Jason	Sanderson, Sandy	sandy.sanderson@gmail.com	QIDSS	c5f8fb640f	08/23/16 15:37:37	08/22/16 15:37:37	Rivers, Jason	Apply Actions
Rivers, Jason	Davis, David	david.davis@gmail.com	QIDSS	a9c6404138	08/23/16 15:36:29	08/22/16 15:36:29	Rivers, Jason	Apply Actions

- Pending requests represent those sponsored account users for whom invitations have been sent, but have yet to be accepted (i.e., the user has not yet created a portal account)
- **NOTE: Sponsored account invitations expire after 24 hours**

Pending Requests > Apply Actions > Resend Invitation

Sponsored Users		Pending Requests						
Sponsor	Sponsored User	Email	Role	Reference No.	Expiration Date	Invite Date	Invite By	Actions
Rivers, Jason	Laurence, Larry	larry.laurence@hotmail.com	QIDSS	4461517a05	08/23/16 15:39:47	08/22/16 15:39:47	Rivers, Jason	Apply Actions Revoke Invitation Resend Invitation
Rivers, Jason	Sanderson, Sandy	sandy.sanderson@gmail.com	QIDSS	c5f8fb640f	08/23/16 15:37:37	08/22/16 15:37:37	Rivers, Jason	Apply Actions
Rivers, Jason	Davis, David	david.davis@gmail.com	QIDSS	a9c6404138	08/23/16 15:36:29	08/22/16 15:36:29	Rivers, Jason	Apply Actions

- You can resend a sponsored account invitation in cases where expiration has occurred
- Click on “Apply Actions”
- Click on “Resend Invitation”

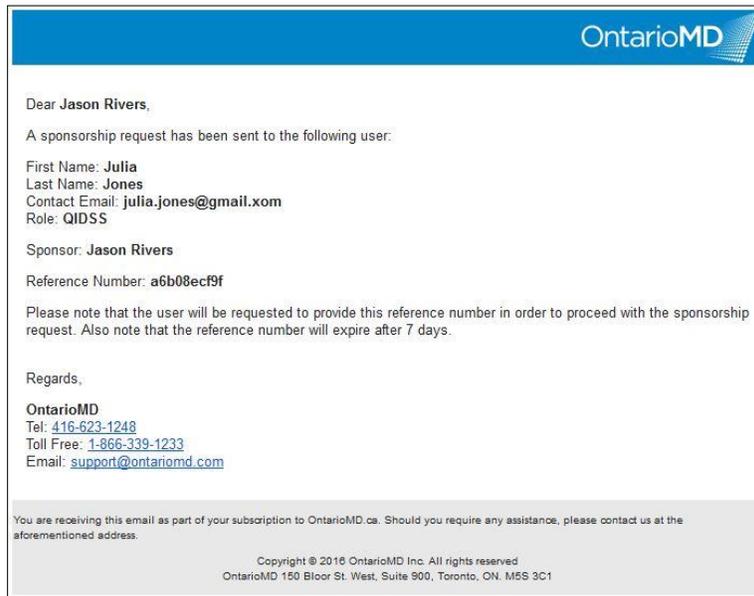


- Click on “OK” to confirm the action

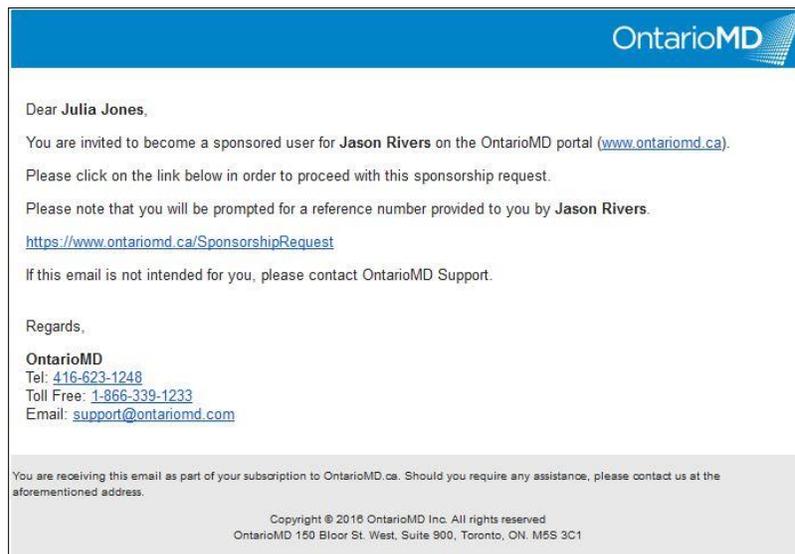


- A confirmation message will appear

- The physician sponsor will receive an email confirming the invitation



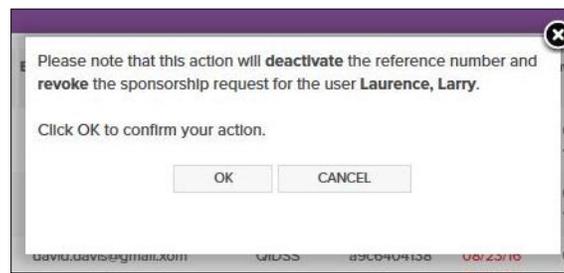
- The sponsored user will receive an email invitation



Pending Requests > Apply Actions > Revoke Invitation

Sponsored Users		Pending Requests						
Sponsor	Sponsored User	Email	Role	Reference No.	Expiration Date	Invite Date	Invite By	Actions
Rivers, Jason	Laurence, Larry	larry.laurence@hotmail.com	QIDSS	4461517a05	08/23/16 15:39:47	08/22/16 15:39:47	Rivers, Jason	Apply Actions Revoke Invitation Resend Invitation
Rivers, Jason	Sanderson, Sandy	sandy.sanderson@gmail.com	QIDSS	c5f8fb640f	08/23/16 15:37:37	08/22/16 15:37:37	Rivers, Jason	Apply Actions
Rivers, Jason	Davis, David	david.davis@gmail.com	QIDSS	a9c6404138	08/23/16 15:36:29	08/22/16 15:36:29	Rivers, Jason	Apply Actions

- You may also revoke a sponsored user invitation
- Click on “Apply Actions”
- Click on “Revoke Invitation”



- Click on “OK” to confirm the action

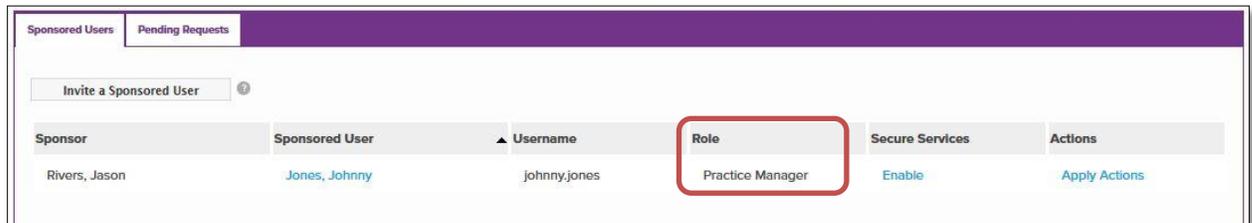


- A confirmation message will appear

Reassigning Roles for Existing Sponsored Users

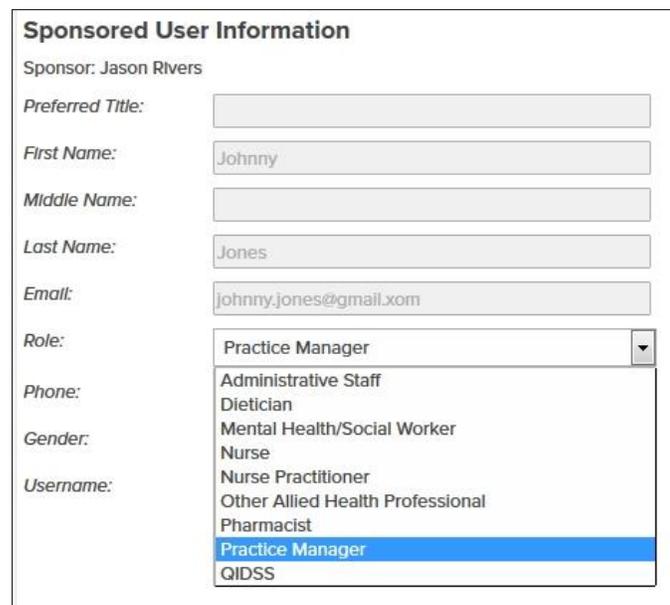
- In some cases, it may be necessary to assign a new role to an existing sponsored user
- For instance, a QIDSS may already be an OntarioMD sponsored user
- **NOTE: Only the original sponsor can assign a new role**
- If the original sponsor cannot be contacted, or will not assign a new role, a new sponsored user must be created
- See [Inviting a Sponsored User](#) to begin the new sponsored user invitation process

Reassigning Roles



Sponsor	Sponsored User	Username	Role	Secure Services	Actions
Rivers, Jason	Jones, Johnny	johnny.jones	Practice Manager	Enable	Apply Actions

- Johnny Jones is presently sponsored as a Practice Manager
- Johnny is also a QIDSS and is participating in the initiative—in order to ensure he has the correct access, he needs to have his user role reassigned to “QIDSS”
- To do this, click on the sponsored user’s name, in this case “Jones, Johnny”



Sponsored User Information
Sponsor: Jason Rivers

Preferred Title:

First Name:

Middle Name:

Last Name:

Email:

Role: ▼

Phone:

Gender:

Username:

- Administrative Staff
- Dietician
- Mental Health/Social Worker
- Nurse
- Nurse Practitioner
- Other Allied Health Professional
- Pharmacist
- Practice Manager**
- QIDSS

- The only field available for editing on this screen is the “Role”
- Click on  to reveal the list of sponsored user roles

Sponsored User Information

Sponsor: Jason Rivers

Preferred Title:

First Name:

Middle Name:

Last Name:

Email:

Role: ▼

Phone:

Gender:

Username:

- Administrative Staff
- Dietician
- Mental Health/Social Worker
- Nurse
- Nurse Practitioner
- Other Allied Health Professional
- Pharmacist
- Practice Manager
- QIDSS**

- Select the “QIDSS” role

Sponsored User Information

Sponsor: Jason Rivers

Preferred Title:

First Name:

Middle Name:

Last Name:

Email:

Role: ▼

Phone: Ext.

Gender:

Username:

- Once selected, click on “Save”

Sponsored Users | Pending Requests

Sponsor	Sponsored User	Username	Role	Secure Services	Actions
Rivers, Jason	Jones, Johnny	johnny.jones	QIDSS	Enable	Apply Actions

- The sponsored user role has been changed to QIDSS