



# Sponsored Accounts | QIDSS Guide

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## OntarioMD/AFHTO QIDSS EPA Partnership Initiative

Version 1.0

Accepting Sponsored Account Invitation

Creating OntarioMD Portal Account

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## Introduction

This guide will assist Quality Improvement Decision Support Specialists (QIDSS) working on behalf of the Association of Family Health Teams of Ontario (AFHTO) to:

- Accept an OntarioMD sponsored account invitation
- Create an OntarioMD portal account
- Access 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](http://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:

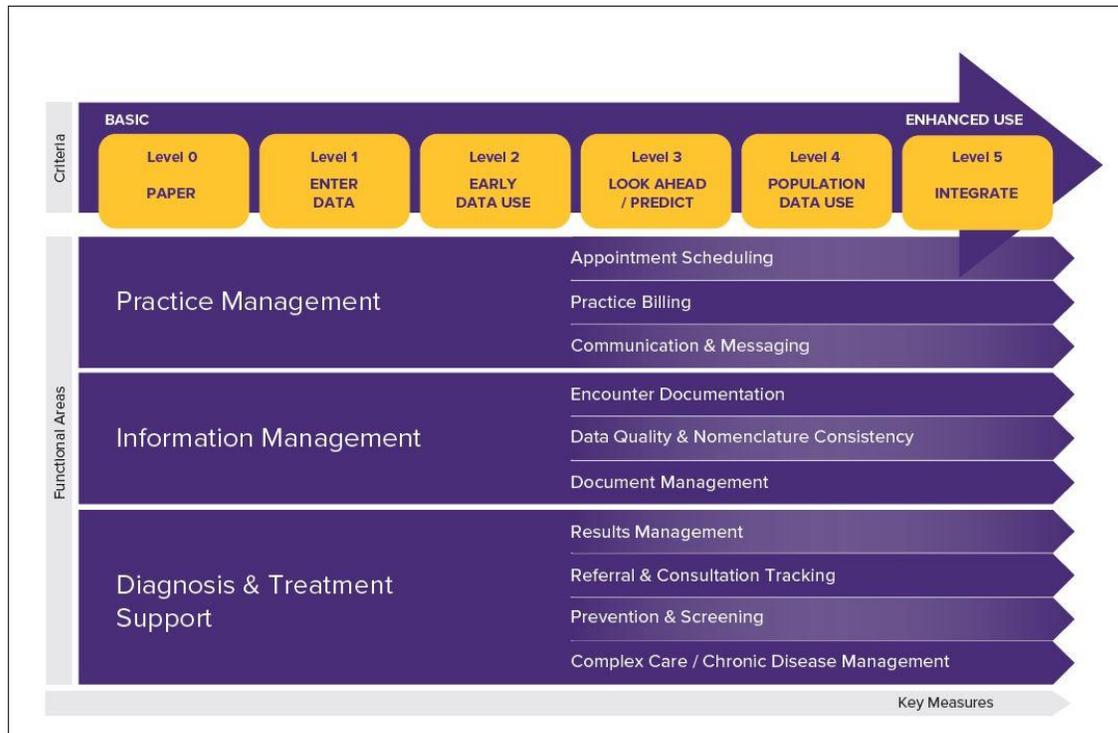
EMR MATURITY MODEL		
Level	Criteria	Capabilities
5	<b>INTEGRATE</b>	Use of portals, hubs, attachment to provincial e-health platforms sharing data from the EMR.
4	<b>POPULATION DATA USE</b>	Dashboarding of whole populations, acting upon the whole, performing population analysis at the practice level.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

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

<b>Practice Management</b>	<b>Information Management</b>	<b>Diagnosis &amp; Treatment Support</b>
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These areas reflect critical aspects of practice and are comprised of ten 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	
<a href="mailto:epep@ontariomd.com">epep@ontariomd.com</a>	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:

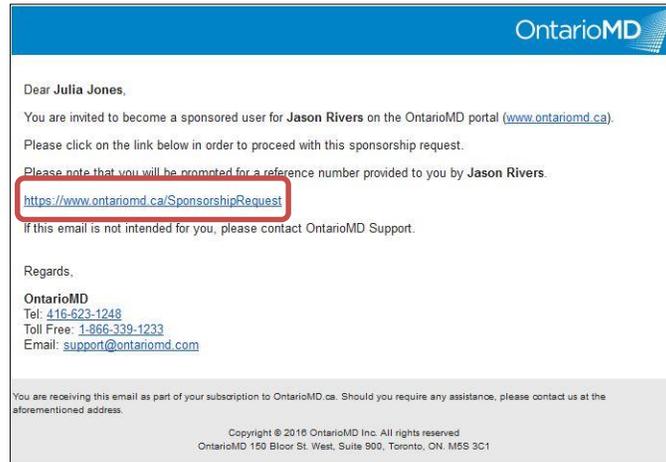
OntarioMD Support	
Hours of Operation	Monday to Friday – 9am to 5pm
Telephone	1.866.744.8668
Email	<a href="mailto:support@ontariomd.com">support@ontariomd.com</a>

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	<a href="mailto:jason.aprile@ontariomd.com">jason.aprile@ontariomd.com</a>

## Accepting Sponsored Account Invitation & Creating Portal Account

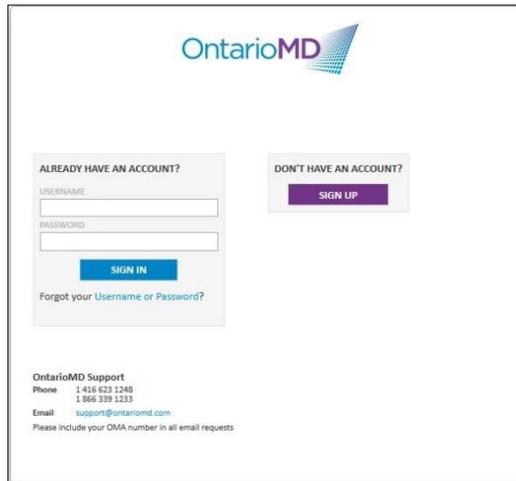
- Once your sponsor has completed the sponsorship process you will receive an email invitation



- The email indicates a reference number is necessary to continue
- Your sponsor has been informed of the need to provide this reference number in a timely fashion because sponsored account invitations are only valid for 24 hours from the time of issuance
- NOTE: If you have not received the reference number in the hours following the invitation, please contact your sponsor**
- Once you have received the reference number, click the link to accept the invitation

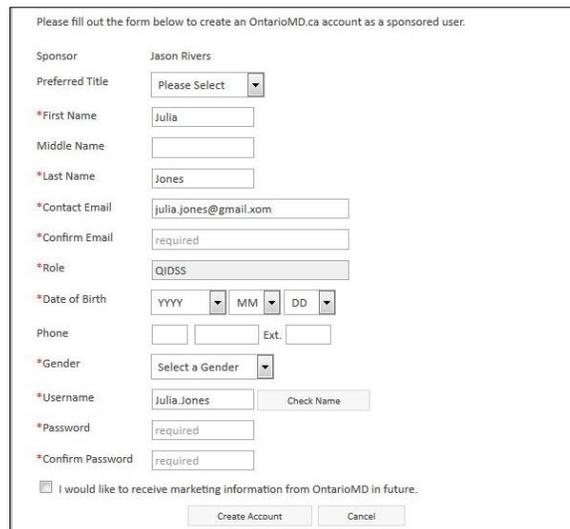
The image shows a web form titled "Please Provide Your Reference Number" from OntarioMD. It prompts the user to enter the reference number provided by Jason Rivers. The form includes a "Sponsor:" field with the value "Rivers, Jason" and a "Reference Number:" field with a "required" label. Below the form are "Cancel" and "Continue" buttons. At the bottom, there is contact information for OntarioMD Support, including phone numbers (1-416-623-1248 and 1-866-339-1233) and an email address (support@ontariomd.com). A note at the bottom asks the user to include their OMA number in all email requests.

- The link will direct you to page which requires the reference number
- Enter your reference number and click on "Continue"



The screenshot shows the OntarioMD login and sign-up interface. At the top center is the OntarioMD logo. Below it, there are two main sections: 'ALREADY HAVE AN ACCOUNT?' and 'DON'T HAVE AN ACCOUNT?'. The 'ALREADY HAVE AN ACCOUNT?' section contains input fields for 'USERNAME' and 'PASSWORD', a 'SIGN IN' button, and a link for 'Forgot your Username or Password?'. The 'DON'T HAVE AN ACCOUNT?' section contains a 'SIGN UP' button. At the bottom left, there is contact information for OntarioMD Support, including phone numbers (1 416 623 1248 and 1 866 339 1233) and an email address (support@ontariomd.com), with a note to include OMA numbers in email requests.

- If this is your first time logging into the OntarioMD portal click on “Sign Up” to create your account
- **NOTE: If you have previously used the portal, you may try to login in with your existing credentials**
- Clicking on “Sign Up” will produce the following screen:



The screenshot shows the account creation form for a sponsored user. The instruction at the top reads: 'Please fill out the form below to create an OntarioMD.ca account as a sponsored user.' The form fields are as follows: 'Sponsor' (Jason Rivers), 'Preferred Title' (Please Select dropdown), '\*First Name' (Julia), 'Middle Name' (empty), '\*Last Name' (Jones), '\*Contact Email' (julia.jones@gmail.com), '\*Confirm Email' (required), '\*Role' (QIDSS), '\*Date of Birth' (YYYY, MM, DD dropdowns), 'Phone' (empty), 'Ext.' (empty), '\*Gender' (Select a Gender dropdown), '\*Username' (Julia.Jones) with a 'Check Name' button, '\*Password' (required), and '\*Confirm Password' (required). At the bottom, there is a checkbox for 'I would like to receive marketing information from OntarioMD in future.' and two buttons: 'Create Account' and 'Cancel'.

- **NOTE: Some of the fields are pre-filled, based on the information provided by your sponsor**
- Complete the mandatory fields, ensuring you have created a valid username and password

Please fill out the form below to create an OntarioMD.ca account as a sponsored user.

Sponsor Jason Rivers

Preferred Title Please Select

\*First Name Julia

Middle Name

\*Last Name Jones

\*Contact Email julia.jones@gmail.com

\*Confirm Email julia.jones@gmail.com

\*Role QIDSS

\*Date of Birth 1984 May 10

Phone Ext.

\*Gender Female

The username Julia.Jones is available.

\*Username Julia.Jones Check Name

\*Password required

\*Confirm Password required

I would like to receive marketing information from OntarioMD in future.

Create Account Cancel

- Your username can take many forms – the firstname.lastname convention employed by Julia.Jones is the default suggestion
- Upon creation of a username, click on “Check Name” to verify whether that username is available
- If unavailable, amend your choice and click on “Check Name”
- Repeat this process until you succeed in finding an available name
- When complete, click on “Create Account”

**OntarioMD**

Congratulations!

You have successfully created an OntarioMD.ca account. Your username is **supersandy**.

You have now become a sponsored user for Jason Rivers.

Return to OntarioMD

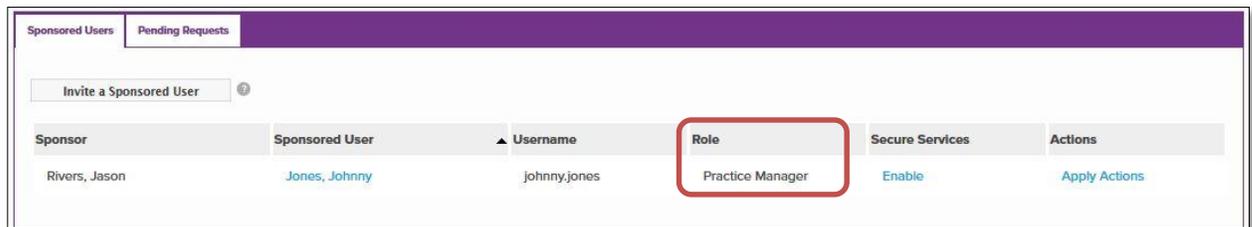
**OntarioMD Support**  
Phone 1 416 623 1248  
1 866 339 1223  
Email [support@ontariomd.com](mailto:support@ontariomd.com)  
Please include your OMA number in all email requests

- Once complete, you will receive confirmation of your successful account creation
- Click on “Return to OntarioMD” to be redirected to the OntarioMD portal ([www.ontariomd.ca](http://www.ontariomd.ca))

## Reassigning Roles for Existing Sponsored Users

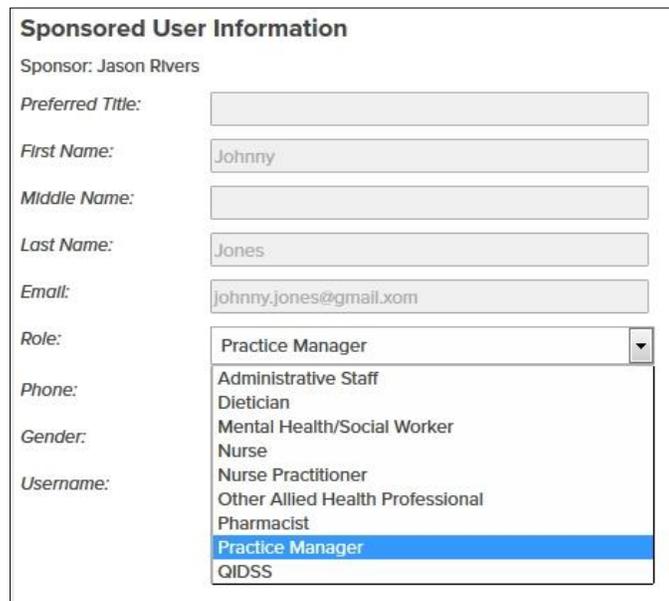
- If you already have an OntarioMD sponsored account, you need not create another
- **NOTE: If you have an OntarioMD portal account and cannot remember your username and/or password contact [OntarioMD Support](#)**
- An existing sponsored account role can be reassigned (i.e., from Practice Manager to QIDSS)
- **NOTE: Only your original sponsor can assign a new role**
- If your original sponsor cannot be contacted, or will not assign a new role, a new sponsored user must be created
- Although you cannot reassign your own role, the following instructions will prove helpful in assisting your original sponsor
- **NOTE: These instructions have been provided in the Physician Guide, but have been duplicated here to inform both parties of this feature**

## 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			
Invite a Sponsored User ?					
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

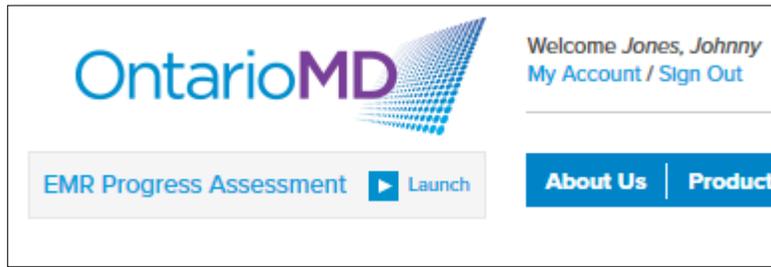
## Login to OntarioMD Portal

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

- Enter your email address to receive a link which enables you 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.
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## Accessing the EMR Progress Assessment (EPA)

- Access to the EPA is only available after logging into the OntarioMD portal.



## Completing the EMR Progress Assessment (EPA)

- Version 2.0 of the QIDSS EPA User Guide will be available in early in the autumn of 2016 and will include detailed instructions on initiating, completing, and submitting the Assessment
- In the meantime, please direct any questions regarding the OntarioMD-QIDSS partnership initiative, the EMR Progress Assessment, and/or the EMR Practice Enhancement Program to:

Program Support	
Contact	Jason Aprile
Telephone	1.866.339.1233 x.5391
Email	<a href="mailto:jason.aprile@ontariomd.com">jason.aprile@ontariomd.com</a>