

# INTRODUCTION TO THE SHARE CLINICAL PORTAL: PRIVATE HEALTH CARE ORGANIZATION – ADMINISTRATIVE ROLE

A Step-by-step guide to logging into SHARE for the first time and verifying your access. This tool can also be used as a reference guide to each of the tabs available to you in the SHARE Clinical Portal.



Province of Nova Scotia  
Department of Health  
and Wellness

**Version 1.0 (June 11, 2015)**

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# Introduction to the SHARE Clinical Portal

Now that you have completed the SHARE training and received your '**SHARE User ID**', follow these step-by-step instructions to:

Log on to SHARE for the first time

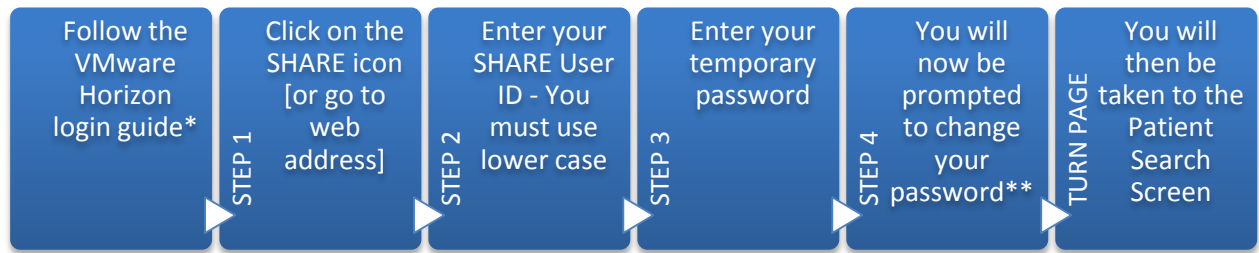
Search for and find a patient

Access the patient's information

**NOTE:** In order to verify that your SHARE access has been created successfully you will need to have one or two Health Card Numbers of patients with whom you have a care relationship who has recently had lab work completed.

This introduction will also describe the tabs you have access to in addition to the "Patient Search" and "Personal Worklist" tabs and provide some general items of note.

## LOGGING IN TO 'SHARE'



### STEP 1:

After you login through VMWare – this link will be on the External Desktop

Share Clinical Portal

# Shar@

SECURE HEALTH ACCESS RECORD

Welcome

## Welcome to the SHARE Clinical Portal.

Log In

Username:

Password:

[SHARE Online Training \(LMS\) Site](#)

For Workstation Requirements to run SHARE click [HERE](#).

**Notices** last refresh: 13:19

February 2015 Update: All NSES ECG waveforms are available in SHARE for DHAs 1-8, IWK and Capital DHA (in addition to already existing textual reports) on the Results tab. This includes the waveform images for Electrocardiograms, Stress Tests and Holter Monitors.

Please call the help desk (1-866-224-2555) if you receive this error: mckntauth.ocx - Unknown Publisher

Weekly downtime: SHARE is unavailable every Monday AM from 0200 to 0205 due to System Maintenance.

Change Your Password

You must change your password before proceeding.

New Password:

Confirm New Password:

**Password Tips**

1. Password must consist of only alphanumeric characters
2. Password must start with a letter
3. Minimum password length is 8 characters

Click "update" to continue

\*Follow the VMware Horizon Login instructions provided in the following document: **3.9 VMware Login Instructions (SHARE)**

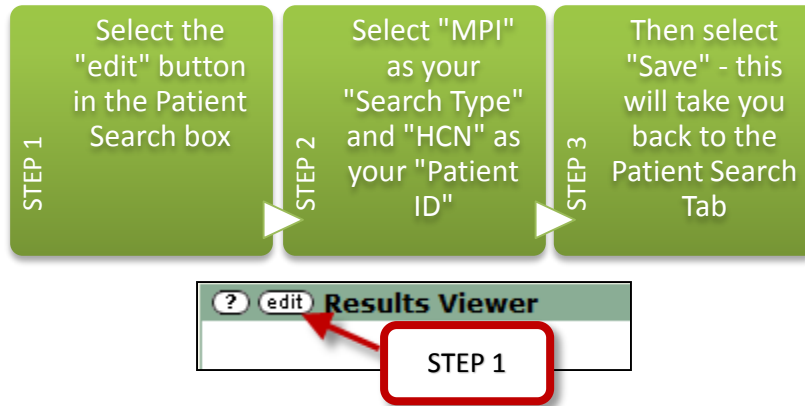
\*\*Your new password must be at LEAST 8 characters long and cannot use symbols (!\*\$@, etc.)

## 'PATIENT SEARCH' TAB

**NOTE:** Please make sure that you have the patient Health Card Number(s) ready at this point.

### ***Before you start...***

Change your default Search Settings to search the Master Patient Index (MPI) by Health Card Number (HCN) – this allows you to search all patients with records in SHARE using their HCN – the most reliable patient identifier.



Shar@  
SECURE HEALTH ACCESS RECORD

Lab Only :: April 21, 2015 | my portal | suspend | help | logout | Site Controls: <Select>

Patient Search | Search by Exact Name | Facesheet | Personal Worklist | Abbreviation Guide | Helpful Tips | Communication | My Page

Personalize Custom CM Patient Search Portlet JSR168 Module  
Module Support Name: CM Patient Search Module (Version: HPP 13.2 Code: 72008554)  
(Currently Saved User Preferences)

Patient Search Selection Parameters

Default Search Type:  MPI  Active  Recent Encounter

Default patient ID number to search by:  Medical Record Number  Encounter Number  Health Card Number  Other Number

Redirect Target: Results

Redirect Module: Results Viewer

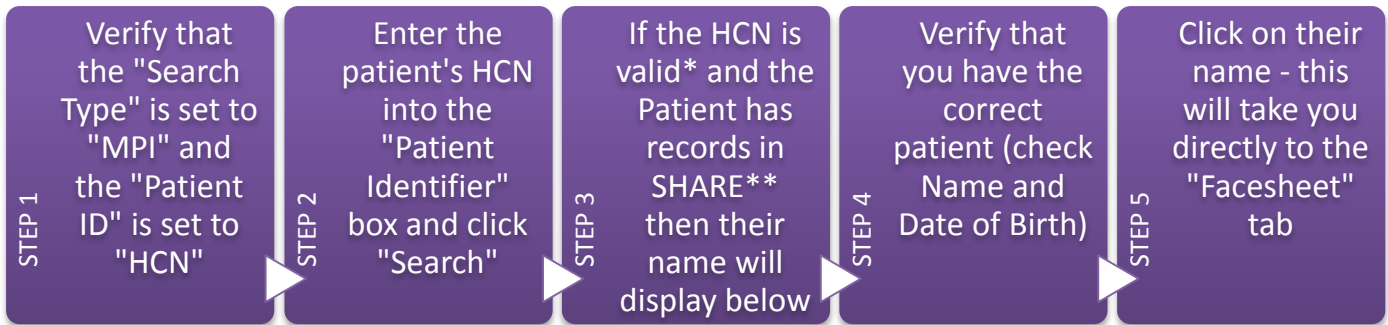
Save Reset Cancel

STEP 2 (points to MPI and Health Card Number)

STEP 3 (points to Save button)

powered by MCKESSON HORIZON

## Search for a Patient



**Share@**  
SECURE HEALTH ACCESS RECORD

Test Administrative staff 1 :: June 30, 2015 | my portal | suspend | help | logout | Site Controls: <Select>

Search by: **Exact Name** | Facesheet | Personal Worklist | Abbreviation Guide | Helpful Tips | Communication | My Page

DATE FORMAT: MM/DD/YYYY | last refresh: 10:16

**Definitions:**  
**Search Types:**  
**MPI:** (Master Patient Index), ALL patient registrations.  
**Active:** Patients currently registered/admitted (NOT discharged).  
**Recent Encounter:** Active and recently discharged patients (discharged within 4 days).  
**Search Options (4):**  
**Medical Record Number (MRN):** Include ALL leading zeros and uppercase letters.  
**Encounter (Account) Number:** Select Recent or Active search type. Include ALL leading zeros and capital letters.  
**Health Card Number (HCN):** NS numbers only. Use complete 10 digit number.  
**Other Number:** Secondary Insurance Numbers (i.e. CF, WCB, Out of Province #).

Custom Search by Number(4) | last refresh: 10:16

Search:  MPI  Active  Recent Encounter  
 Choose the patient ID number to search by:  Medical Record Number  Encounter Number  Health Card Number  Other Number

Enter the patient identifier and click 'Search':

Search Clear

**Searches may yield more than one patient because:**

- The patient has not yet been merged through various health systems
- The Nova Scotia Healthcard Number may map to an Out of Province Health Number

\*Please Select the correct patient from the list.

**Share@**  
SECURE HEALTH ACCESS RECORD

Lab Only :: April 21, 2015 | my portal | suspend | help | logout | Site Controls: <Select>

Search by: **Exact Name** | Facesheet | Personal Worklist | Abbreviation Guide | Helpful Tips | Communication | My Page

Medical Record Number (MRN): Include ALL leading zeros and uppercase letters.  
 Encounter (Account) Number: Select Recent or Active search type. Include ALL leading zeros and capital letters.  
 Health Card Number (HCN): NS numbers only. Use complete 10 digit number.  
 Other Number: Secondary Insurance Numbers (i.e. CF, WCB, Out of Province #).

Custom Search by Number(4) | last refresh: 8:17

Search:  MPI  Active  Recent Encounter  
 Choose the patient ID number to search by:  Medical Record Number  Encounter Number  Health Card Number  Other Number

Enter the patient identifier and click 'Search':

Search Clear

2 Patients | Add To Patient List

Visits	Patient Name	MRN	Facility	Sex	Birthdate	Age
	LAST NAME, FIRST	XXXXXXXXXXXX	Cape Breton Health (CBH)	F	MM/DD/YYYY	40 Y
		XXXXXXXXXXXX	IWK Health Centre (IWK)			
		XXXXXXXXXXXX	Capital District (Q)			
		XXXXXXXXXXXX	Aberdeen Regional (ARH)			
		XXXXXXXXXXXX	Colchester Region. (CRH)			

\*If the patient's name does not appear, verify that you have typed their HCN correctly.

\*\*Not all patients have records in SHARE. If their HCN has been entered correctly but nothing comes up it is possible that they have not had any lab results entered into SHARE. If you know that they have had lab work done recently which should be in SHARE but their name does not appear, attempt the second HCN. If that also does not work, call the Service Desk to verify that your access is correct.

## 'SEARCH BY EXACT NAME' TAB

### Overview

If you do not have access to the patient's Health Card number it is possible\* to search by their exact name and date of birth:



The screenshot shows the 'Search by Exact Name' interface. At the top, there are navigation links like 'my portal', 'suspend', 'help', and 'logout'. Below that, there are search filters for 'MPI', 'Active', and 'Recent Encounter'. The main search area has three input fields: 'Last Name', 'First Name', and 'Birthdate (MM/DD/YYYY)', each with a red box around it and an arrow pointing to a central 'STEP 1' label. To the right of these fields is a 'Sex' dropdown menu with 'Male' selected. Below the input fields is a 'Search' button with a red box around it and an arrow pointing to a 'STEP 2' label. The page also includes a 'DATE FORMAT' section with 'MM/DD/YYYY' and a 'Definitions' section with search criteria.

\*It is not recommended to use this search function as the SHARE Clinical Portal hosts data for patients throughout the province and the possibility that there will be multiple patients with the same name is very high. It is always recommended that you only search by Health Card Number.



## 'PERSONAL WORKLIST' TAB

**NOTE:** You will be able to assign tasks to Clinical users within your clinic.

Share@  
SECURE HEALTH ACCESS RECORD  
Task Administration: July 23, 2015 | my portal | suspend | help | logout | Site Control: <Select>

Patient Search by: Exact Name | Facesheet | **Personal Worklist** | Abbreviation Guide | Helpful Tips | Communication | My Page

Patients: No patients | Encounters: No encounters

Custom Demographics | No patient selected. Please select a patient.

DATE FORMAT: MM/DD/YYYY

**Personal Worklist**  
Owner: Administrative staff 1, Test | List: LONG TERM CARE FACILITY | Add All Patients | Add Current Patient

Search by Follow-up Date:  
Dates: | Days Forward: | From: | To:

View List Results

Patient Name	Follow-Up Date	Notes
<input type="checkbox"/> ADD, HAROLD		
<input type="checkbox"/> DOUBLE, DOUBLE		
<input type="checkbox"/> FIREFIGHTER, SALLY		
<input type="checkbox"/> FIREFIGHTER, SAMANTHA		
<input type="checkbox"/> NEWSHARE123, NUMBER		
<input type="checkbox"/> UPPFIFTEEN, ANNA PATRICIA		

Task List Portlet  
Subject [1 - 1 of 1]  
Send all screens for Alex  
View All | Add Task | Options

**edit** Task List Portlet

Subject [1 - 1 of 1]  
Send all screens for Alex

View All | Add Task | **Options**

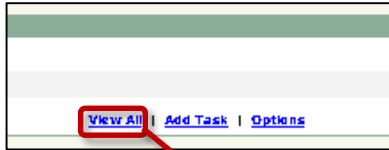
**Task List Portlet > Edit Options**

Main View: Display up to 3 tasks.

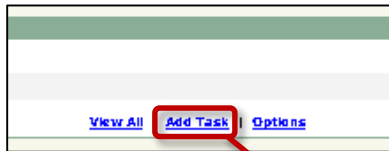
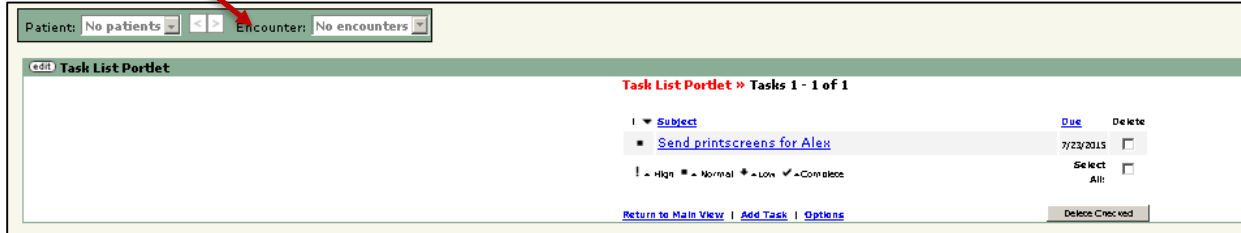
Full Task List: Display 10 tasks per page.

Update Cancel

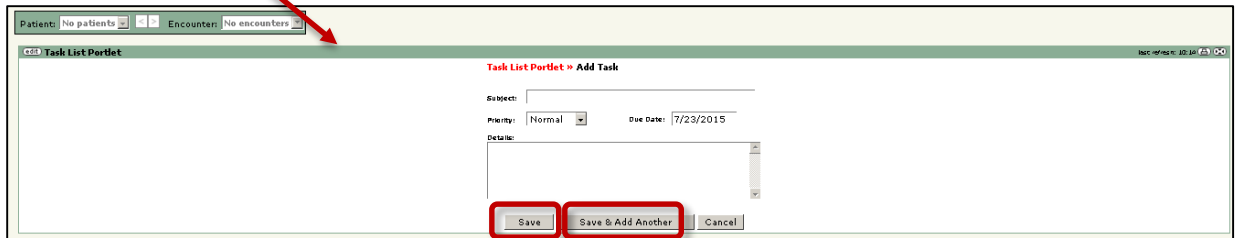
When you've finished select "Update" and this will bring you back to the "Personal Worklist" Tab (Selecting "Cancel" will also bring you back to the "Personal Worklist" tab)



Selecting the “View All” option at the bottom of the “Task Portlet” section of the Personal Worklist will open the page below which allows you to review and update all of the tasks assigned to you.



Selecting the “Add Task” button will open the page below. This will allow you to create tasks.



When you’ve finished select “Save” and this will bring you back to the “Personal Worklist” Tab (Selecting “Cancel” will also bring you back to the “Personal Worklist” Tab)

Selecting “Save & Add Another” will save your task and refresh this page to allow you to create another task

Do NOT navigate in the SHARE Portal with the browsers' "Back" and "Forward" buttons. You will be taken out of the portal.

## CONFIRM YOUR ACCOUNT SETUP

If you have been able to search for and find your patient, have been able to review the Personal Worklist tab let your Pharmacy Owner/Manager know so they can confirm your account setup with the Department of Health and Wellness.

The information provided after this point is for your reference.

## OTHER TABS

### Facesheet

This section hosts the demographic information for your patient from every visit recorded in SHARE – displaying the most recent visit initially or the current visit you are viewing. This section is helpful, for example, if you are having a hard time contacting your patient and want to verify that their phone number is correct in your records.

The screenshot shows the SHARE portal interface. At the top, there is a navigation bar with "my portal", "suspend", "help", and "logout" buttons. Below this, there are tabs for "Patient Search", "Results", "Facesheet", "Abbreviation Guide", "Helpful Tips", "Communication", and "My Page". The "Facesheet" tab is active. The main content area displays patient information in a table format. A red box highlights the "Encounter:" dropdown menu, with a callout box stating "Drop down this menu to select other encounters – to verify demographic information". Another red box highlights the "PHONE (H)" and "PHONE (W)" fields, with a callout box stating "Patient's phone number will display here".

NAME	LAST NAME, FIRST	ADM DATE/TIME	03/20/2015 11:43
ADDRESS #1	ADDRESS	SERVICE	
ADDRESS #2		PT TYPE	Emergency
CITY		DIS DATE/TIME	03/23/2015 00:00
PROV/POSTAL		LOS	4 D
COUNTY		DISCHG DISPOS	
PHONE (H)	(XXX) XXX-XXXX	MRN #	XXXXXXXXXXXX
PHONE (W)		ACCOUNT #	C89999999/99
OPT OUT	N/A	HC #	999999999
FIN CLASS		BIRTHDATE	MM/DD/YYYY
ACCIDENT		SEX	Female
ACCIDENT DT		ETHNIC ORIGIN	
ARRIVAL MODE		MARITAL STAT	unknown
ADMIT MD		CONSULT MD #1	
ATTEND MD		CONSULT MD #2	
PRI CARE MD		CONSULT MD #3	
REFER MD		CONSULT MD #4	
ER MD		CONSULT MD #5	
SHARED MD			

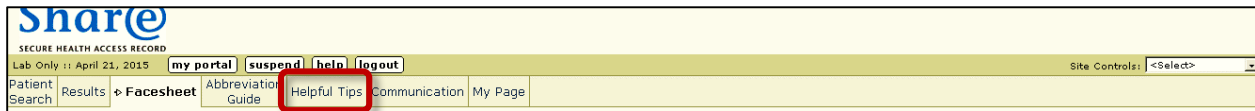
### Abbreviation Guide

The "Abbreviation Guide" tab lists all of the abbreviations in SHARE results and lists and what they stand for (e.g., site, hospital, health district codes).

The screenshot shows the SHARE portal interface with the "Abbreviation Guide" tab selected. The navigation bar at the top includes "my portal", "suspend", "help", and "logout" buttons. The "Abbreviation Guide" tab is highlighted in the main navigation area.

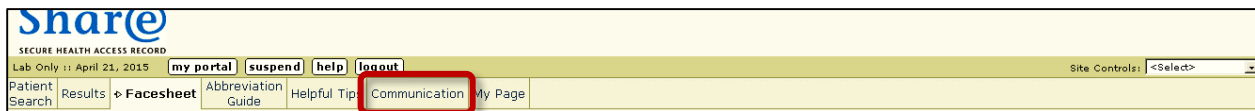
## Helpful Tips

This section holds the data scope, outlining how far back the results in SHARE will go – 2010 for Halifax and IWK, 2012 for all other areas of Nova Scotia.



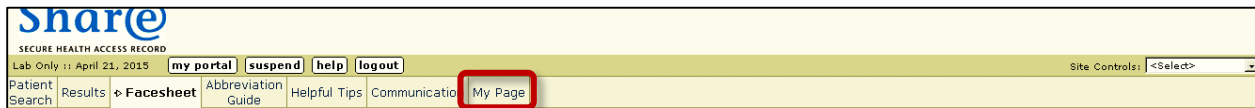
## Communication

In this section you will see updates and information from the SHARE technical and project teams regarding the SHARE Clinical Portal. This could include information about new features, updates on major issues or resolutions, etc.



## My Page

This is a customizable page to use as a resource for yourself in SHARE.

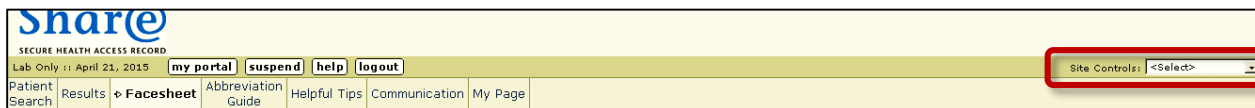


It includes a “Favourites” section to save useful links directly in SHARE to avoid closing out or minimizing SHARE while performing a search.

There is also a comments box in this tab – comments or suggestions entered here go directly to the technical team and can be made anonymous (select the “anonymous” box below the text box).

## Site Controls

This section allows to you navigate around the SHARE Portal and change certain settings including your Password.



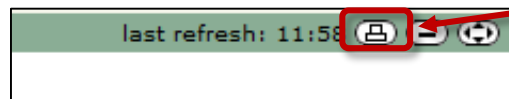
## PRINTING IN 'SHARE'

**NOTE:** Because information is continually being added to SHARE, anything you print is a snapshot of a “point-in-time”.

You are encouraged **not to print** from SHARE, but if you do you will see a “SHARE” watermark.

Anything you print is **NOT to be shared** – with patients or other clinicians – **or filed**; it is to be used for **reference only and shredded immediately after use**.

The Print option is at the top of every “box” or section in SHARE. To print a result or a section within SHARE for reference simply open that result (or scroll to the section you want) and scroll to the top\* of that section – the green bar with the title – and select the “print” icon.



A printer properties window will open. Verify that the correct printer is selected and print the section.

**Share**  
SECURE HEALTH ACCESS RECORD  
Lab Only :: April 21, 2015 | my portal | suspend | help | logout | Site Controls: <Select>

Patient Search | Results | Facesheet | Abbreviation guide | Helpful Tips | Communication | My Page

DATE FORMAT: MM/DD/YYYY | last refresh: 8:14

Definitions: | last refresh: 8:14

Search Types:  
MPI: (Master Patient Index), ALL patient registrations.  
Active: Patients currently registered/admitted (NOT discharged).  
Recent Encounter: Active and recently discharged patients (discharged within 4 days).

Search Options (4):  
Medical Record Number (MRN): Include ALL leading zeros and uppercase letters.  
Encounter (Account) Number: Select Recent or Active search type. Include ALL leading zeros and capital letters.  
Health Card Number (HCN): NS numbers only. Use complete 10 digit number.  
Other Number: Secondary Insurance Numbers (i.e. CF, WCB, Out of Province #).

Custom Search by Number(4) | last refresh: 8:14

Search:  MPI  Active  Recent Encounter  
Choose the patient ID number to search by:  Medical Record Number  Encounter Number  Health Card Number  Other Number

Enter the patient identifier and click 'Search':

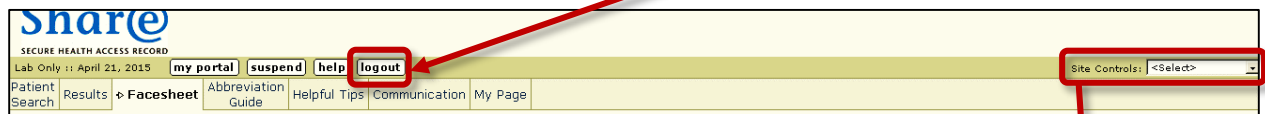
Search Clear

\*The print option will print everything in the section below the icon on the screen. Make sure that you select the correct print icon.

## END SESSION (LOG OUT and CLOSE 'SHARE')

To protect patient privacy and avoid unauthorized persons accessing the information available in SHARE you must log out whenever you are finished with SHARE.

To close your session in SHARE all you have to do is select the “log out” button at the top of your page.



**NOTE:** Do not select “suspend” or close your browser window to exit.

In order to avoid leaving your session logged in accidentally, you can go the “Site Controls” and select “My Preferences” to change the settings to automatically log-out if you have been inactive or away from your computer for 5 or 10 minutes.

## RESOURCES and TROUBLESHOOTING

If you are experiencing issues with SHARE or your access (i.e., forgot password, or have been locked out) contact the **Service Desk** at **1-866-224-2555**.

There are also resources available through SHARE directly on the “My Page” tab. Select “SHARE FAQs” document.