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.
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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’**

Follow the VMware Horizon login guide*

Click on the SHARE icon [or go to web address]

Enter your SHARE User ID - You must use lower case

Enter your temporary password

You will now be prompted to change your password**

You will then be taken to the Patient Search Screen

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**STEP 1:**

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

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**STEP 2-3**

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**STEP 4**

Click “update” to continue

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*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.)

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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.

‘PATIENT SEARCH’ TAB

STEP 1
Select the "edit" button in the Patient Search box

STEP 2
Select "MPI" as your "Search Type" and "HCN" as your "Patient ID"

STEP 3
Then select "Save" - this will take you back to the Patient Search Tab

Introduction to the SHARE Clinical Portal v1.0 (June 11, 2015)
**Search for a Patient**

**STEP 1**
Verify that the "Search Type" is set to "MPI" and the "Patient ID" is set to "HCN".

**STEP 2**
Enter the patient's HCN into the "Patient Identifier" box and click "Search".

**STEP 3**
If the HCN is valid* and the Patient has records in SHARE** then their name will display below.

**STEP 4**
Verify that you have the correct patient (check Name and Date of Birth).

**STEP 5**
Click on their name - this will take you directly to the "Facesheet" tab.

*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.

Introduction to the SHARE Clinical Portal v1.0 (June 11, 2015)
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:

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

Select "edit" and/or "Options" to change the number of default days/tasks to display.

Change the number of days and/or Tasks to display by using the drop-down menus.

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.

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).
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.
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.

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