



NL Electronic Health Record Client Registry User Guide V2.0

January 2013



Copyright Notice

This document is fully copyright protected by the Newfoundland and Labrador Centre for Health Information

Reproduction, in its original form, is permitted for background use for private study, educational instruction and research provided appropriate credit is given to the Centre for Health Information. Citation in editorial copy, for newsprint, radio and television is permitted. The material may not be reproduced for commercial use or profit, promotion, resale, or publication in whole or in part without written permission from the Centre for Health Information.

Newfoundland and Labrador Centre for Health Information
70 O'Leary Avenue
St. John's, NL A1B 2C7

Phone: 709-752-6000

Fax: 709-752-6066

www.nlchi.nl.ca

Document Revision History

Date	Version	Status	Description	Author
2011-03-29	0.1	1 st Draft	1 st draft of the Client Registry User Guide	E. Hamlyn, M Foote
2011-03-31	0.2	2nd Draft	Revisions to Client Registry User Guide: formatting, content, table and appendices	E. Hamlyn, M. Foote
2011-05-31	1.0	Final document	Approved Client Registry User Guide	E. Hamlyn, M. Foote
2013-01-23	2.0	Amendment approved	Revisions to algorithm thresholds and general updates. Web links for CR Education tools included in Education section. Updated appendices (R. Ennis)	E. Hamlyn

Page intentionally left blank

Table of Contents

1	NL EHR Client Registry	1
1.1	Introduction	1
1.2	Purpose of the Client Registry.....	1
1.3	Reference Coverage	1
1.4	Client Registry Governance Advisory Committee	2
2	Description of the Dataset.....	3
2.1	Description	3
2.2	Provincial EHR	3
2.3	Client Registry Source Systems and Data Exchange	3
2.4	Data Dictionary/Elements	6
3	Data Standards.....	7
3.1	Data Collection.....	7
4	Data Processing	8
4.1	Record Retention	8
5	Data Quality.....	9
5.1	Edit Process.....	9
5.2	Data Quality Reports	10
5.3	Historical Data Quality Issues.....	10
6	Education.....	11
6.1	Client Registry Education Session	11
	Appendix 1 Client Registry Viewer and Password Agreement	13
	Appendix 2 How to Use the Client Registry Viewer	17

List of Figures

Figure 1: Client Registry Data Exchange

Figure 2: Client Registry (Initiate) Viewer

List of Tables

Table 1: Client Registry Source Systems/ Data Exchange

Table 2: Probabilistic Algorithm Thresholds

Page intentionally left blank

1 NL EHR Client Registry

1.1 Introduction

This document has been prepared to inform users of the NL Electronic Health Record (NL EHR) Client Registry related to the collection, processing, use and disclosure of information contained within this key provincial health information system.

This document will be reviewed annually and revised as needed to ensure it remains current and useful. Feedback from readers is welcomed and encouraged. Suggestions for future updates can be sent to:

EHR Data Quality Specialist
Data Quality and Standards (DQS)
Newfoundland and Labrador Centre for Health Information
70 O'Leary Avenue
St. John's, NL A1B 2C7
Bus: (709) 752-6089
Fax: (709) 752-6066

1.2 Purpose of the Client Registry

The Client Registry is the foundational component of the Newfoundland and Labrador Electronic Health Record. It serves as the linking key for multiple information systems within the Electronic Health Record (EHR). The Client Registry enables the accurate identification of clients, patients and residents (clients) in NL and in the organizational source systems from which they receive care and services.

The Client Registry plays three important roles in the provincial EHR infrastructure:

1. Acts as a repository with the most up-to-date client demographic information;
2. Provides a reliable cross-reference of all client identifiers belonging to the same person; and,
3. Acts as the authoritative source of the unique identifier (EID) to be used by the interoperable electronic health record.

1.3 Reference Coverage

The Client Registry includes all individuals that present to a Regional Health Authority (RHA), have registered for an MCP number and/or present to a pharmacy connected to the Pharmacy Network.

The Client Registry began in 2001 and was previously known as the Unique Personal Identifier (UPI). Source systems connected between 2001-03 and included the Regional Health Authorities through their Meditech systems, the Client and Referral Management System (CRMS), the Department of Health and Community Services Medical Care Plan (MCP). Diagnostic Imaging - Picture Archiving and Communications System (DI-PACS) connected in 2008 and pharmacies connected to the Drug Information System in 2009.

Vital Statistics, a division of the Department of Government Services is not connected to the Client Registry; however, Vital Statistics provide 'date of registered death' and 'date of registered birth' reports to the Registry Integrity Unit (RIU) on a monthly basis.

1.4 Client Registry Governance Advisory Committee

The Provincial Health Information Management (HIM) Leadership Committee fulfills the role of the Client Registry Governance Advisory Committee. It ensures the data within the Client Registry is of the highest quality attainable and available for stakeholder use. This committee is responsible for setting provincial health information standards and facilitating implementation within the public health sector. The Provincial HIM Leadership Committee also advises the Centre on Client Registry operational and information management issues, including the collection, use and disclosure of personal health information. It is comprised of representatives from internal and external stakeholders.

2 Description of the Dataset

2.1 Description

The Client Registry contains demographic and administrative information that is collected at registration points throughout the health system, stored on local health information systems and shared with the Client Registry. It serves to identify individuals accessing the health system through a cross-referenced index of identifiers (e.g., MCP, unit number) assigned to clients by respective health systems. The Client Registry does not contain clinical information.

Please note the term 'client' is used throughout this document and can be used interchangeably for patient and resident.

2.2 Provincial EHR

The provincial Client Registry was originally implemented in 2001 as the foundational component of the NL EHR to support accurate client identification. The Client Registry is fundamental to the province's vision for an integrated EHR which aims to improve health through the provision of quality health information for all residents of the province. An EHR provides individuals with a secure, private, lifetime record of their health information and care within the healthcare system. An EHR will be available electronically to authorized health care providers anywhere, anytime in support of high quality care. The Registry Integrity Unit (RIU) is the day to day data manager of the Client Registry. The Client Registry is used by source systems to retrieve and validate the most complete and up-to-date client demographic and administrative information available (e.g., name, address, and identification numbers). The Client Registry does not contain clinical information but enables clinical information to be linked to the correct individual within the EHR.

2.3 Client Registry Source Systems and Data Exchange

The Client Registry currently exchanges data electronically with regional Meditech, systems, the provincial CRMS, MCP and multiple pharmacy vendor systems. Additional data is manually entered as available from Vital Statistics. Source systems have different access and privileges depending on operational need and system configuration.

The Client Registry uses the software application, Initiate™ to facilitate the matching of records from different source systems and create a single view from the multiple records that may exist.

2.3.1 Client Registry Data Exchange

A Meditech and Pharmacy Network customization enables a CR query prompt (active interface) to access the Client Registry in real time. Other source systems exchange a sub-set of information with the Client Registry in the background (passive interface).

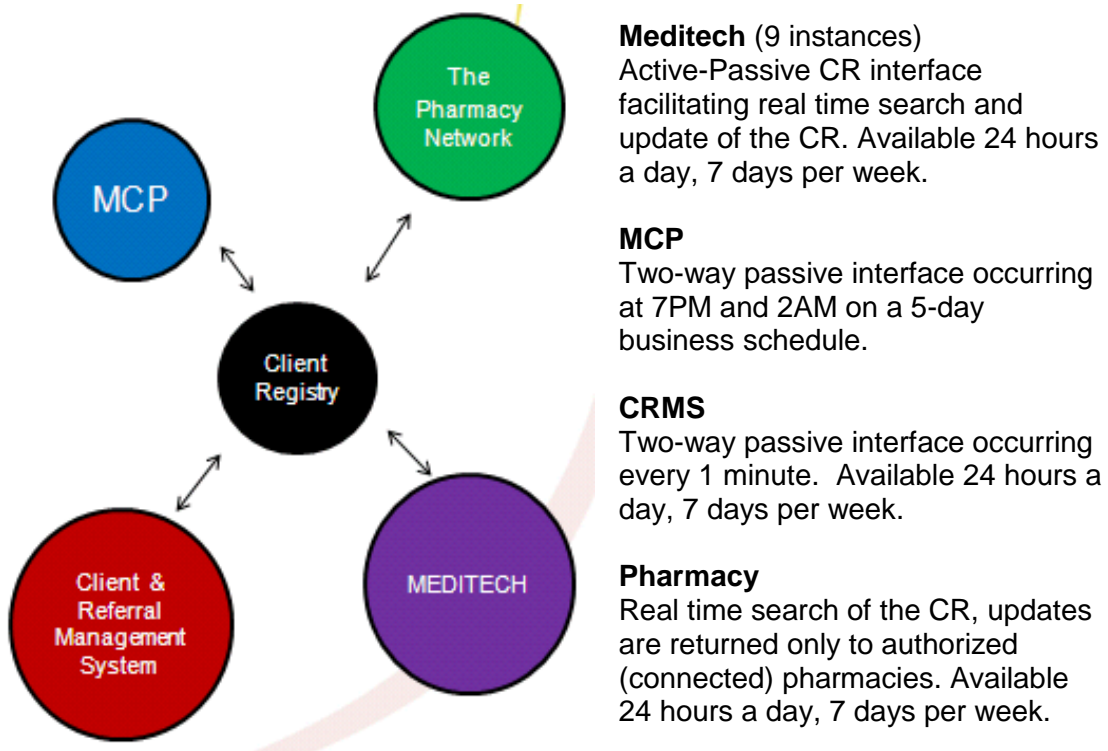


Figure 1: Client Registry Data Exchange

2.3.2 Authority to access Client Registry Viewer (Initiate Enterprise Viewer™)

The Client Registry Viewer identifies data attributes collected within the Client Registry and the content collected within authorized source systems. Source systems exchange with the default – NLCHI Enterprise View, which is driven by the “last update date” to ensure the most current data is exchanged.

RHA staff responsible for data quality work flow processes are encouraged to complete the application for Client Registry look up access found in Appendix 1. Completed applications must be approved by the applicant’s manager and monitored on an ongoing basis. The Centre’s approval is granted through EHR Operations and monitored on an annual basis. Training is provided by the RIU (Appendix 2).

Note: Access will enable RHA staff to view the “default- NLCHI enterprise” column containing the most up to date information. Staff cannot view identifiable information (e.g., unit numbers) from other source systems involved with the client.

The screenshot shows the 'Initiate Enterprise Viewer' interface. At the top, there is a navigation bar with 'PERSON' selected and tabs for 'Search Identity', 'Retrieve', 'Results', and 'Details'. Below this is the 'Identity Detail View' section, which includes buttons for 'Select All', 'Reset', 'Report', 'History', and 'Previous Page'. The main content is a table with five columns representing different data sources. A 'Test Data' tooltip is visible over the second column. The table contains the following data:

Field	Source 1	Source 2	Source 3	Source 4
Enterprise ID	1000004790	1000004790	1000004790	1000004790
Source:Source ID	HCCSJ:1317072	AHCIB:M321	CRMS:680930	Default - NLCHI Enterprise
Get Notes	[Pencil icon]	[Pencil icon]	[Pencil icon]	
Check Member Task		Test Data		
Check Entity Task				
Legal Name	DUMMY, CRASH TEST	DUMMY, CRASH TEST	DUMMY, CRASH TEST	DUMMY, CRASH TEST
MCP Number			NL_HCN:200003664329	NL_HCN:200003664329
Unit Number	HCCSJ_U:000908499999	AHCIB_U:M000169		HCCSJ_U:000908499999
CRMS Region			CRMS8901	CRMS8901
Birth Date	2000-12-31		2000-12-31	2000-12-31
Sex	M-Male	M-Male	M-Male	M-Male
Mother's Name	TESSY	TESSY		TESSY
Home Mailing Address	323B ROCKY ROAD ANYWHEREVILLE, NL A0A 9Z9 CA	323 ROCKY ROAD SELDOM COME BY, NL A1X 9E5 CA	88 ROCKY ROAD ANYWHEREVILLE ADAMS COVE, NL A0A 9Z9	88 ROCKY ROAD ANYWHEREVILLE ADAMS COVE, NL A0A 9Z9
Home Telephone	709 999 9998	709 999 9998	709 999 9998	709 999 9998
Other Telephone	(709)-777-9999 X25	(709)-777-9999 X25		(709)-777-9999 X25
Registrar ID	MARM	DAWA	HCS04078	HCS04078
Update Date	2006-06-19 10:30	2004-09-26 21:59	2011-05-09 10:46	2011-05-09 10:46

Figure 2: CR (Initiate) Viewer

2.4 Data Dictionary/Elements

The Centre worked closely with regional representatives to compile an inventory of existing source system data fields, and develop a master list of all data elements in use. The Client Registry Governance Advisory Committee will advise on future standards changes including the development and adoption of data elements within the Client Registry. The table below contains data elements exchanged between source systems and the Client Registry (Initiate system).

Initiate™ Data Element	Meditech (9)	MCP	CRMS	Pharmacy
Enterprise ID				
Source				
Source ID	URN	MCP #	System Client Key	Client Identifier
Name	Last Name	Last Name	Last Name	Last Name
	Given/First Name	Given/First Name	Given/First Name	Given/First Name
	Middle Name	Middle Name	Middle Name	
MCP Number	Health Care #	MCP #	MCP #	MCP#
Unit Number(s)	Unit Number(s)			
Birth Date	Birth Date	Date of Birth	Birth Date	Date of Birth
Birth Date Registered				
Gender	Gender	Gender	Gender	Gender
Mother's Name	Mother's Name			
Home Address	Street	Street	Address	Address
	Street	Street	Address	
	City	City	City	City
	Province		Province	Province
	Postal Code	Postal Code	Postal Code	Postal Code
	Country		Country	Country
Home Telephone	Home Phone	Phone Number	Home Phone	Phone Number
Other Telephone	Other Phone		Business Phone	Other Phone Work Phone Mobile Phone Fax Number
MCP Eligible Date		Date Eligible		
MCP Term. Date		Date Termination		
MCP Term. Reason		Code Term. Reason		
Other Name	Maiden/Other Names	Maiden Name	Maiden/Other Name	
ALT HCN	Insurances		HCN	
ALT HCN Description	Policy Number		HCN Description	
Death Date	Date of Death		Death Date	
Death Date Registered				
Registrar ID	Registrar ID	Update User	Registrar ID	Registrar ID
Update Date	Update Date	Update Date	Update Date	Update Date

Table 1: Client Registry Source Systems/ Data Exchange

3 Data Standards

3.1 Data Collection

Demographic and administrative data is collected at many points of registration within the NL public health system. Similar information is collected by the Department of Health and Community Services such as MCP, as residents of the province register for health insurance coverage.

Information received from one source into the Client Registry is used to update the records of those individuals in the other systems. Some source systems do not accept updated fields unless validated (i.e., MCP requires legal documentation before it performs a name change). Therefore, it is vital that only the most accurate information be collected and exchanged among these systems. Data standards have been developed and shared with regional points of registration to support the collection and exchange of accurate demographic and administrative data.

3.1.1 Provincial Standard for Registration

The Provincial HIM Leadership Committee developed a provincial standard for registration. This standard was developed to ensure standardized registration processes are used at all points of registration within the health system. It supports the collection and exchange of the most accurate demographic and administrative data and must be followed by all staff when entering data into their local information systems. Lack of adherence to standards causes incomplete and inaccurate information to be exchanged. This could lead to potentially harmful situations as services may be provided based on this erroneous information. For more information refer to section 6 Education.

3.1.2 Provincial Standard for Date/Time Documentation Format

The Provincial HIM Leadership Committee developed a provincial standard for date/time documentation format. The accurate recording and subsequent interpretation of dated entries is fundamental to the effective operation and delivery of service and is paramount to supporting client safety and continuity of care. To avoid confusion and achieve clarity, the date/time format used for electronic and written documentation needs to be consistent. For more information refer to section 6 Education.

4 Data Processing

The registration process is vital to a complete and accurate health record and plays a major role in identifying individuals using the health and community services system in NL. It is very important for staff to collect and validate information. Please see section 6 Education for the recommended client registration process.

The information collected and exchanged by various source systems run through a matching process that applies a probabilistic algorithm to incoming data. The algorithm assesses demographic and administrative attributes with different weights, for example MCP, date of birth and name have a higher weight scoring than address and phone number. Probabilistic algorithm results are set at three different levels: direct match, probabilistic match and non match.

Probabilistic Algorithm Three Thresholds	
1. Auto-link Threshold: A Direct Match automatically linked by computer	>15
2. Probabilistic Match: requires RIU manual review to resolve task/s	8.5-15
3. Non match: single source, not matched by computer	<8.5

Table 2: Probabilistic Algorithm Thresholds

4.1 Record Retention

Each RHA is the custodian of the personal health information within its source system as defined by Personal Health Information Act (PHIA). The Centre is the custodian of the personal health information within its data holdings including the Client Registry as defined by PHIA. All historical data items are retained indefinitely within the CR System.

5 Data Quality

Data quality is essential to providing quality information. The Client Registry provides accurate and timely data to its source systems. The expectations for high quality data increase as the scope and magnitude of the Client Registry expands. The RIU receives email generated alerts advising when a source system interaction with the Client Registry results in data changes. These changes include the deletion of key fields (e.g., date of death), updating or adding invalid or duplicate MCP numbers, record unmerges or merges and/or activities requiring the manual review/intervention by RIU staff.

5.1 Edit Process

The Registry Integrity Unit is responsible for the edit process. Some edits are automatic (e.g., AutoLink), while others are manual processes (e.g., ManuLink). There are six types of tasks generated for review by the RIU. They are named and defined as follows:

- **Potential Duplicate:** Identifies multiple records existing within the **same source** system that have a high potential of representing the same individual.
- **Potential Linkage:** Identifies records existing in **different source** systems that have a high potential of representing the same individual.
- **Potential Overlay:** Identifies records within the **same source** system that have high potential of an incorrect association between different individual's data i.e., two or more different persons sharing the same data attribute (e.g., Source ID).
- **Review Identifier:** Identifies records within the **same source** system that have a high potential that a client could be incorrectly sharing unique identifying information, [such as MCP number] by comparing records and tracking duplication of identifiers.
- **Merge:** As a part its records maintenance, stakeholder data providers may sometimes merge clients (two or more records are joined). The RIU will review all Merges coming into the Client Registry; this is a manual process.
- **Unmerge:** An unmerge is performed at the RHA level when a merge has been performed in error. The RHA staff separates previously merged record/s and restores the records to the original state. The RIU review all unmerges coming into the Client Registry; this step is a manual process.

5.2 Data Quality Reports

The RIU produces standardized reports for authorized users at Regional Health Authority sites, MCP and Vital Statistics on a regularly scheduled basis. These reports include unresolved tasks [see section 5.1] and are exchanged electronically by Managed File Transfer (MFT) to key stakeholders for resolution. The MFT require log in, encryption and is password protected. Ad hoc reports are generated on an as needed basis.

These data quality reports are designed to assist with local data maintenance and to provide information back to Client Registry source systems.

5.3 Historical Data Quality Issues

When the Client Registry was populated from source systems, data quality issues with demographic data were identified, addressed and are monitored on an ongoing basis. Examples include:

- Application of naming conventions and use of initials rather than full middle name.
- Missing/incomplete address information.
- Source system updating of deceased field rather than discharged field.
- Unknown date/s inputted as 19000101 (YYYYMMDD).
- Unknown postal code inputted as mini postal code 'NL'.

6 Education

6.1 Client Registry Education Session

Ongoing user training and education is essential to support optimal use of the Client Registry and the attainment of higher data quality. CR Education sessions will continue to be offered through the Data Quality and Standards Division at the Centre.

RHA staff are encouraged to download, print and post the communication tools found on the NLCHI Website. These documents were developed to support registration staff and are reviewed and updated regularly.

<http://www.nlchi.nl.ca/index.php/client-reg>

The Client Registry and You - Brochure

The Registration Process – Poster

The Client Registration Process

<http://www.nlchi.nl.ca/index.php/clinical-standards-and-information>

Provincial Standard for Registration

Provincial Standard for Date / Time Documentation Format

To request current version(s) of these documents, please contact:

EHR Data Quality Specialist

NL Centre for Health Information

Bus: (709) 752-6089

Email: elaine.hamlyn@nlchi.nl.ca

Page intentionally left blank

Appendix 1

Client Registry Viewer and Password Agreement

Page intentionally left blank



Client Registry Viewer & Password Agreement

BETWEEN:

The Newfoundland and Labrador Centre for Health Information, represented by the Chief Information Officer or designate (hereinafter referred to as the "Centre")

AND:

Applicant Name: _____ Position/Title: _____

Employer Name: _____

Employer Address: _____

City/Town: _____ Province: _____ Postal Code: _____

Business Telephone Number: _____

Applicant's email Address: _____

Applicant's User ID; provide ID and type _____

MEDITECH CRMS NLPDP
 MCP CYFS Other _____

Please state your intended use of Newfoundland and Labrador Client Registry:

This Agreement governs the use of the Newfoundland and Labrador Client Registry operated by the Centre.

This Agreement must be read together with the following:

1. the *Personal Health Information Act*, SNL 2008, c. P-7.01 and regulations;
2. the information policies and procedures established by your employer; and
3. the confidentiality standards as outlined by your respective professional association (as a regulated health care professional).

PART A: CONFIDENTIALITY AND ACCEPTABLE USE

Acceptable Use: You agree to not access, collect, use or disclose any personal health information maintained in the Client Registry for any purpose or in any way other than those authorized under the above-noted legislation, policies, and standards of practice.

You agree that you will not use the Client Registry for an illegal or improper purpose, or take steps that would have a negative impact on the security, integrity or functioning of the Client Registry.

Confidentiality: You agree to treat as confidential all information collected, used and disclosed in association with the Client Registry, whether verbal or written, and will not participate in or permit the unauthorized release, publication or disclosure of that information to any person, corporation or other entity under any circumstances except as authorized by law and the above-noted legislation, policies, and standards of practice.

You agree to treat as confidential all information relating in any way to the security and management of the Newfoundland and Labrador Client Registry and your employer's computer system.

PART B: PASSWORDS

Passwords: You agree to keep your Password absolutely confidential; it is for your use alone. You will not tell anyone else your Password. You must carefully read the documentation that accompanies your password, which includes acceptable uses and expectations of users.

If you have questions or concerns please contact the NLCHI Service Desk at 1-877-752-8008.

If Your Password Becomes Known: If you suspect that someone else knows your Password you must notify the Centre's Service Desk at 1-877-752-8006 or in person at 70 O'Leary Ave. St. John's as soon as possible (and in any case within 24 hours after learning or suspecting such loss or use) and follow the instructions given to you by the Centre.

Password Recovery: The Centre collects a limited amount of personal information that is used to verify the applicant's identity in the event that a password recovery is required. Please respond to at least one of the following three questions:

What is your mother's maiden name? _____

What is your city/town of birth? _____

What is your favourite colour? _____

Responsibility for Losses: You are responsible for any and all uses of the Client Registry associated with your Password.

PART C: OTHER

The Centre for Health Information may lay an allegation with your employer and/or the respective Professional Association governing your occupation without prior notice where:

1. you permit unauthorized access to the Client Registry; and
2. you use the Client Registry in a manner that is inconsistent with the terms of use and/or the terms of this agreement.

Penalty: In addition to any disciplinary action by your employer and/or your Professional Association, you are also subject to any legislated penalties.

Please Note: For continuous quality improvement of the Client Registry and to ensure the protection of personal health information, access to Client Registry may be monitored without notice.

APPLICANT:

Print Name

Signature

Date (YYYY- MM- DD)

Submit via registered mail to:
Registry Integrity Unit
Centre for Health Information
P.O. Box 1498
41 Conception Bay Highway
Bay Roberts, NL A0A 1G0
ATTN: Administrative Officer
Telephone: (709) 786-5336

FOR CENTRE USE ONLY:

Print Name

Signature

Date (YYYY- MM- DD)

User Name Assigned

To be completed by Authorizing Manager

I recognize that the approval of this access application and assignment of a User ID and Password, gives the applicant authorized access to the Client Registry. I understand that this allows the applicant to access confidential information and I accept that it is both the applicant's and my responsibility, given that I am authorizing access for this applicant, to ensure the total confidentiality of all information accessed from the Client Registry. I accept responsibility to notify the Centre should the user no longer require access to the Client Registry in the course of his or her duties or should there be a breach in the terms of this agreement.

Authorizing Manager's Name (Please Print)

Work Phone Number

Authorizing Manager's Signature

Date (YYYY- MM- DD)

If you have questions or concerns please contact the NLCHI Service Desk at 1-877-752-8006.

Appendix 2

How to Use the Client Registry Viewer

Page intentionally left blank

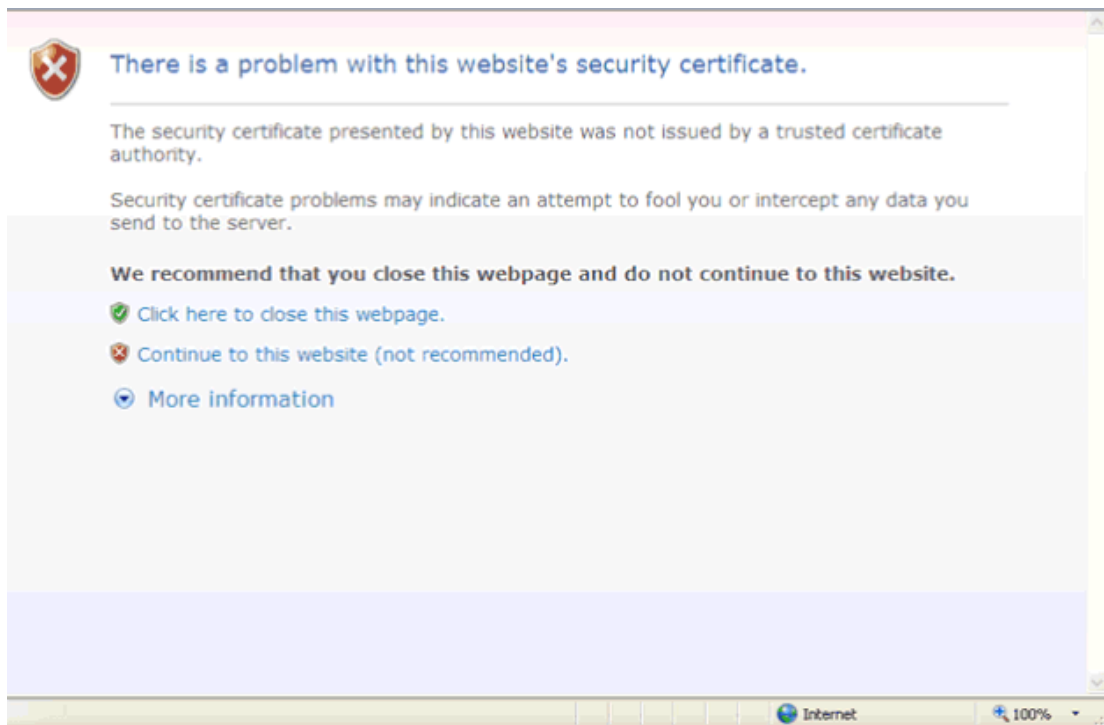
Utilizing Client Registry Viewer

If at any point you have problems logging in or accessing the appropriate screen. Repeat the process before contacting the Centre's Service Desk (1-877-752-6006)

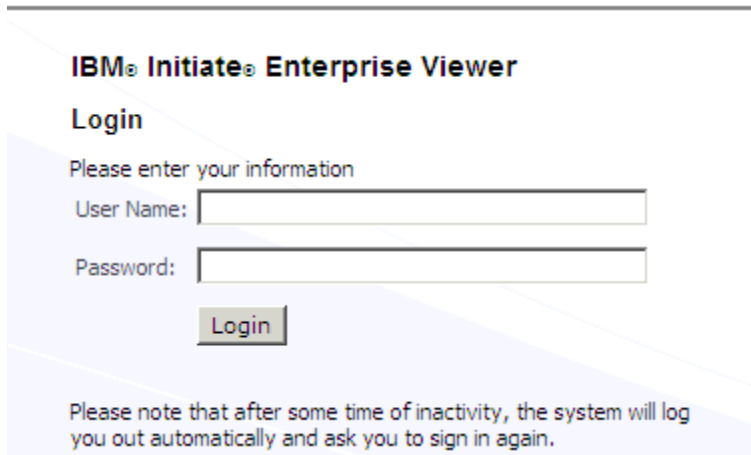
1. Open your internet browser (e.g., Internet Explorer) and proceed to the following URL:
<http://10.26.45.35:81> or <http://10.55.105.1:81>

If you receive the website security certificate message (below), please select 'Continue to this website'.

Note, In this instance, ignore the warning and proceed to the Client Registry Viewer. This message is under review and should be resolved shortly.



2. Read 'Conditions of use'.
3. If you have no concerns, select 'Agree'.
4. The login screen (below) should be displayed.



IBM® Initiate® Enterprise Viewer

Login

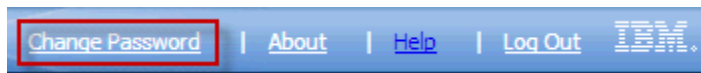
Please enter your information

User Name:

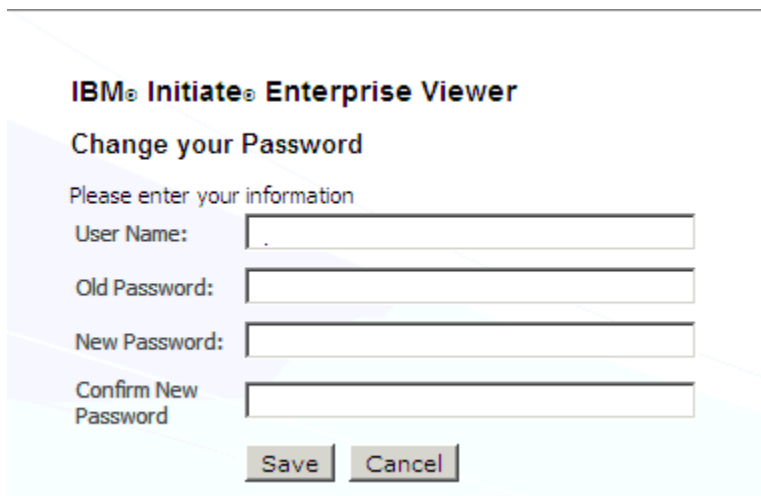
Password:

Please note that after some time of inactivity, the system will log you out automatically and ask you to sign in again.

5. Enter the 'User Name' and 'Password' that was assigned by the NL Centre for Health Information Registry Integrity Unit (RIU), (**crms_hcs**).
- Note**, These fields are case sensitive and must be typed in as they are provided.
6. Select 'Login' to proceed.
7. After your initial login, change your password by selecting the 'Change Password' link located in the upper right corner of the page.



The 'Change your Password' screen should be displayed:



IBM® Initiate® Enterprise Viewer

Change your Password

Please enter your information

User Name:

Old Password:

New Password:

Confirm New Password:

8. Input the required information to change your password
Select 'Save' when complete.
9. The Initiate search screen (below) should display.
- Note**, The system defaults to the 'Search PERSON' option.
The 'Retrieve PERSON' feature can be used by clicking on the 'Retrieve' button.

The screenshot shows a web interface for searching a person. At the top, there is a navigation bar with a dropdown menu for 'Search Patient' and a 'Retrieve' button. A green callout bubble with the text 'Click here to Retrieve a Patient' points to the 'Retrieve' button. Below the navigation bar is the title 'Search PERSON'. Underneath the title is a blue bar containing 'Reset' and 'Search' buttons. The main search area has a yellow background and contains the following fields:

- MCP:** A text input field.
- Last Name:** A text input field.
- First Name:** A text input field.
- Middle Name:** A text input field.
- Gender:** A dropdown menu.
- Birthdate:** A text input field with a placeholder 'YYYYMMDD' to its right.

10. To find the correct client in the most accurate and efficient manner, the search criteria order should be:

1. MCP number in the MCP field (This typically results in a direct match)
 2. Client demographic information (This is your last search option)
- Note,** Please complete as many fields as possible to reduce the number of possible matches and increase the likelihood of finding the correct person. The pre-configured attribute combinations that can be used in a person search include:

- Combination of all data attributes including name fields
- Combination of any data attribute/s with name fields
- Facility Unit Source and Unit Id (i.e., chart number) with name fields
- Birth date with first and last name
- Gender with first and last name
- First, middle and last name
- Telephone with first and last name
- First and last name

11. When using the Retrieve option (below), select (**used for MCP and CRMS only**):
1. 'Source' from the drop down box (highlighted in red), and
 2. 'Source ID' (highlighted in green), used when an identifier for the client is known (i.e., CRMS number).
 3. Select 'Retrieve' (red arrow).

The screenshot shows a web interface titled "Retrieve PERSON". At the top, there is a search bar with "Search Patient" and a "Retrieve" button. Below the title, there are two main sections for search criteria. The first section includes a "Source:" dropdown menu (highlighted with a red border), a "Source ID:" text input field (highlighted with a green border), a "Composite View:" dropdown menu set to "MCP User View", and an "Entity View:" dropdown menu set to "Patient". Below these are "Reset" and "Retrieve" buttons. The second section includes an "Enterprise ID (EID):" text input field, a "Composite View:" dropdown menu set to "MCP User View", and an "Entity View:" dropdown menu set to "Patient". Below these are "Reset" and "Retrieve" buttons.

12. **Review search and retrieve results carefully** regardless if there is one match or multiple potential matches:
- Please ask the end user to provide a MCP # or Unit #
 - Click 'Search'
 - Select the check the box of the preferred record
 - Select 'View Detail'
13. To view the available history (below):
- Select the appropriate 'source ID' check box
 - Select 'History'
14. Ensure that you 'Log Out' when:
- You have completed your search/retrieve; or
 - You step away from your work station.

Page intentionally left blank



70 O'Leary Avenue, St. John's, NL A1B 2C7
Telephone: 709-752-6000 • Facsimile: 709-752-6011

Registry Integrity Unit, 41 Conception Bay Highway
E. K. Jerrett & Associate Building, Bay Roberts, NL A0A 1G0
Telephone: 866-279-1198 • Facsimile: 709-786-5337

www.nlchi.nl.ca