Connect Care Key Concepts: Clinician – Practitioner – Provider

Significance

The terms health care “clinician”, “practitioner”, “provider”, “prescriber” and “professional” are often used in discussions about use of the Connect Care clinical information system (CIS). This is important because these labels can imply limits to practice.

Connect Care promotes collaborative care across multiple settings and domains. Members of a patient’s circle of care should be identified in a way that helps with identification but does not imply unnecessary or unhelpful hierarchies. On the other hand, CIS design forces decisions what different health professionals need to do and may be permitted to do. Accordingly, it is important to define and standardize terms used to refer to CIS users and how those terms map to roles and permissions.

Sources

Engagement and adoption, medical affairs, health professions, regulatory agencies and strategic transformation teams were polled for definitions of a variety of terms, including:

- clinician, healthcare professional, healthcare practitioner, healthcare provider, prescribing healthcare professional, regulated healthcare professional,
- physician, physician assistant, physician extender,
- allied healthcare professional, advanced care practitioner,
- nurse practitioner, nurse clinician, midwife.

Separately, Epic terminology and definitions have been inventoried, then mapped to HSS roles with similar functions.

A surprising amount of diversity emerged. Different labels are used to refer to similar roles, and the same labels can have different interpretations. Both labels and interpretations are affected by norms, legislation and policy.

Approach

A core Connect Care strategy is to avoid micro-encoding professional CIS entitlements and instead to keep roles and permissions simple and sustainable. As much as possible, appropriate CIS use is managed through training, professionalism, audit and feedback. This is particularly important given the scope and complexity of the Connect Care initiative. Health Shared Services (HSS) needs to accommodate different scopes of practice (for the same role) in urban and rural areas, and for facilities with different staffing levels. Accordingly, less emphasis is given to specific labels and more to role categories.

Health Care “Providers” – International Differences

There is an important difference between use of the term “provider” in the United States and Canada.

The US federal government definition of a provider emphasizes a regulated scope of practice that includes entitlement to request, prescribe or claim for health care interventions. Such providers include physicians, doctors of osteopathy, podiatrists, dentists, chiropractors, clinical psychologists, optometrists, nurse practitioners, nurse-midwives, and State-authorized social workers. Health care providers must be State-certified in order to submit a claim for benefits.

Canadian usage is broader. The Canadian Institute for Healthcare Information and the Health Council of Canada include all health care professionals in the category of “healthcare provider,”

irrespective of whether they can request, prescribe, document or claim for interventions. Accordingly, all nurses, occupational therapists, physiotherapists and many other clinicians are "providers" in Canada.

Epic's use of the term "provider" most closely matches HSS's understanding of the term "prescriber", including physicians, resident physicians, nurse practitioners, clinical assistants, nurse midwives and other professionals entitled to prescribe.

There is no perfect terminology. Connect Care needs to adopt and use labels that usefully map to Epic terms.

Health Care "Prescribers" – A Common Denominator

Use of the term "provider" by Connect Care can be confusing to Alberta subject matter experts. Accordingly, we recommend the term "prescriber" with the understanding that this most closely maps to Epic's "provider". We also recommend avoiding the term "provider".

Connect Care Role Groupers

The following role labels align with prevailing HSS usage and are chosen as a minimum set needed to frame conversations about end-user engagement, access, adoption, capacity-building and information sharing. The following terms relate to persons directly involved in patient care:

Term	Simple Definition	CIS Grouping	CIS Accountability
Clinician	Any person who provides health care goods or services directly to patients, inclusive of trainees.	Anyone in a direct clinical service-providing role, not a clinical support or administrative role.	Use this term whenever all physicians, nurses, allied health and other healthcare workers are served jointly by Medical Affairs, CMIO and Clinical Operations.
Physician	A qualified, licensed and registered physician, surgeon or osteopath.	Inclusive of trainees, physician assistants, physician extenders, clinical assistants or clinical associates supervised or accountable to a physician or physician service area.	Use this term whenever referring broadly to physician and related communities served primarily by the CMIO portfolio and Medical Affairs.
Prescriber	Any regulated healthcare professional authorized to prescribe medications or health care interventions.	Inclusive of physicians, as defined above, nurse practitioners, midwives, pharmacists, podiatrists and trainees.	CIS accountability for prescriber CIS training and support rests primarily with the CMIO portfolio.
Nurse	Any healthcare professional registered as a nurse under the health professions act.	Inclusive of all levels of nursing and advanced roles, including trainees.	CIS accountability for all nursing roles, including nurse ordering, rests with the Clinical Operations portfolio.

Term	Simple Definition	CIS Grouping	CIS Accountability
Allied Health	Any healthcare professional registered under the Allied Health Professions Act.	Inclusive of all defined disciplines and their trainees.	CIS accountability, including any extended roles with some prescribing functions, rests with the Clinical Operations portfolio.

Connect Care Prescriber Contexts

Healthcare prescribers, as defined above, place orders. Some prescribers can sign orders, and so become Ordering Prescribers (the person who clicks 'Sign' for an order). Ordering prescribers can work in one or more order-generating contexts within the Connect Care CIS. For convenience, Epic terms for ordering contexts are adapted, as below.

Context	Description	CIS Implication
Admitting Prescriber	The admitting prescriber is the prescriber who orders a patient's admission to an inpatient facility.	Only inpatient encounters need an admitting prescriber. Admitting prescribers can be trainees but not students.
Attending Prescriber	The attending prescriber is the prescriber (as defined above) on record as managing the care of an admitted patient at a given point in time. There must be at least one but can be many attending prescribers during a facility stay. There can be only one attending prescriber at any one point in time.	Attending prescribers pertain in emergency and inpatient settings and are not defined in outpatient or ambulatory settings. Attending prescribers can be named during admission, transfer, check-in or inpatient workflows.
Encounter Prescriber	The Encounter Prescriber is the prescriber (as defined above) on record as managing an outpatient, scheduled, virtual or telephone encounter with a patient. There can be only one Encounter provider per encounter.	Encounter Prescribers pertain in outpatient settings and can be named during scheduling, check-in or clinic workflows. Since Encounter Prescribers can be updated at the time of service, there is no need to distinguish "Appointment Prescribers" for Connect Care.
Plan Prescriber	A Plan Prescriber is the clinician responsible for managing a specific aspect of a patient's treatment spanning more than one encounter. This usually relates to Therapy Plans and Protocols.	The Plan Prescriber designation is reserved for situations where an accountable clinician places present and future orders that relate to multiple visits or encounters (e.g., hospital outpatient department) where the orders are unified under a common Therapy Plan, Oncology Protocol, Care Pathway or similar intervention plan.
Trainee Prescriber	Trainee prescribers include residents (1-3 years post medical school graduation and CPSA registration with a trainee licence) and fellows (4 or more years	Trainees can generate orders that do not have to be co-signed by an attending prescriber. However, they may be expected -- as a matter of

Context	Description	CIS Implication
	post graduation). Alberta follows a competency-based, not time-based, approach to determining what a trainee is able or allowed to do. Most fellow perform and are treated like "junior attendings" but it is also possible for some residents to be assigned advanced functions upon demonstration of competency.	training, policy or competency – to request co-signature for particular orders. Some classes of orders can be restricted from trainee initiation or co-sign exception. Trainees (even fellows) are never billing providers.
Student Prescriber	Student prescribers include all 3 or more-year medical students permitted by either the University of Alberta or the University of Calgary to serve and learn in HSS facilities or clinics. Also included are nurse practitioner, midwifery, physician assistant and pharmacy students placed in HSS facilities.	Student prescribers, including nurse practitioner, physician assistant, midwifery and pharmacy students, require authorization for orders placed. Elective student prescribers may be enrolled in external programs but approved by Alberta universities and Health Shared Services.
Authorizing Prescriber	The authorizing prescriber is the prescriber under whose authority an order is placed. This person can be an admitting, attending or trainee prescriber but not a student prescriber.	The CIS can be configured to allow medication order authorization, non-medication order authorization or both for any given role. If a clinician is not an authorizing provider, then orders must be signed by an authorizing provider. Outpatient authorizing providers can be identified and entered by schedulers and clinicians.
Supervising Prescriber	A supervising prescriber is a prescriber who supervises another clinician for some aspect of care provision. Authorizing providers, who can be trainees, may still need to document a supervising prescriber.	With Attending Prescriber roles making most sense in the inpatient setting (where a supervisory responsibility is assumed), the Supervising Prescriber designation makes most sense in outpatient settings. Trainees may be prompted to enter a Supervision Prescriber for an encounter and will be defaulted to the same name for the same clinic on the same day.
Co-signing Prescriber	The Co-signing Prescriber is the prescriber with authority to validate clinical components of a chart and confirm the veracity of an order. Orderers who require co-signature can select an Attending, Authorizing or Supervising prescriber.	Any clinician who is not an authorizing prescriber must indicate an authorizing prescriber when entering orders. The co-signing prescriber, therefore, is always an authorizing prescriber. Trainees can be co-signing prescribers for students.
Billing Prescriber	A billing prescriber is an authorizing prescriber who is permitted by Alberta Health and/or third party healthcare insurers to bill for the service ordered.	Although trainee prescribers can be authorizing prescribers, they cannot be billing prescribers. Most authorizing prescribers (who will be either

Context	Description	CIS Implication
		attending or encounter prescribers) are also billing prescribers. Billing prescribers are considered by Alberta Health to be the person providing or responsible for the provision of a service. Accordingly, "Service Prescriber" and "Performing Prescriber" designations (distinct from Billing Prescriber) is not needed for Connect Care.
Referring Prescriber	A Referring Prescriber is the person referring a patient for an encounter.	Referring Prescribers are named in outpatient settings. However, they are also required in inpatient settings for billing purposes. In this context, they are normally the emergency room or family medicine or primary care provider initiating the hospital visit.
Consulting Prescriber	A Consulting Prescriber is a prescriber asked to see a patient by an authorized provider. On consulting services, the Consulting Prescriber is also the Authorizing Prescriber and usually the Supervising Prescriber.	Consulting prescribers pertain in both inpatient and outpatient settings.

Connect Care Non-Prescriber Ordering Contexts

Healthcare clinicians, as defined above, can participate in ordering workflows. They may receive a verbal order, enter an order requiring co-signature or otherwise initiate, communicate or help validate an order. For convenience, Epic terms for ordering non-prescriber providers are adapted, as below.

Context	Description	CIS Implication
Ordering Clinician	The ordering clinician is the person caring for a patient who decides to place an order. This person need not be a prescriber.	All orders must be associated with a person initiating the order. This person can be a prescriber, a non-prescriber clinician, a trainee or a student. Different rules can be defined in outpatient and inpatient settings.
Order Communicating Clinician	The communicating clinician is the person to whom an order is relayed (e.g., verbal or telephone order) who then enters the order in the CIS.	Anyone with a clinician CIS record can be entered as a communicating clinician.

Mapping Alberta Clinician Labels to Connect Care Prescriber Labels

Label	Description	CIS Mapping
Practitioner	A Physician, Dentist, Oral and Maxillofacial Surgeon, Podiatrist, or a Scientist Leader, who has a medical staff appointment; or a nurse practitioner.	Admitting Prescriber, Attending Prescriber, Encounter Prescriber, Authorizing Prescriber, Referring Prescriber, Consulting Prescriber, Plan Prescriber
Professional	A healthcare professional is any individual who is a member of a regulated health discipline, as defined by the Health Disciplines Act or the Health Professions Act, and who practices within a defined scope or role.	This term is too general for differential role use in CIS configuration.
Physician	A qualified medical doctor (MD or equivalent) licensed to practice by the CPSA.	Prescriber
Most Responsible Provider	An independently licensed prescriber who has responsibility and accountability for a specific phase of health care, such as a hospitalization, ICU stay or period of rehabilitation.	Attending Prescriber (inpatient), Encounter Prescriber (outpatient), Authorizing Prescriber (including nurse practitioners)
Most Responsible Practitioner	The health practitioner who has responsibility and accountability for the specific treatment/procedure(s) provided to a patient and who is authorized to perform the duties required to fulfill the delivery of such a treatment/procedure(s) within the scope of his/her practice.	Attending Prescriber (inpatient), Encounter Prescriber (outpatient), Authorizing Prescriber (including nurse practitioners)
Hospitalist	Fully licensed family physicians and medical staff members participating in a Hospitalist Program at an adult acute care site or fully licensed pediatrician participating in the Pediatric Hospitalist program at the Alberta Childrens Hospital.	Attending Prescriber
Physician Assistant	A non-physician graduate of an accredited Physician Assistant training program, registered with the CPSA, who always works under supervision of a physician although not necessarily in the same room as the supervising physicians.	Authorized Prescriber
Physician Extender	Resident physicians (trainees) who have completed a year of training and both parts of the Medical Council of Canada qualifying examination, have a College of Physicians	Trainee Prescriber

Label	Description	CIS Mapping
	and Surgeons of Alberta license endorsement, increased insurance and have been credentialed by medical affairs through a Non-Appointed Medical Staff Privileges process.	
Clinician	Any person who provides health care goods or services directly to patients, inclusive of all health care workers (physician, nurse, allied health, etc.); as opposed to being engaged in health care for other purposes, such as research or administration. A generic term that should not connote any particular profession, provider or competency level.	This term has limited utility for CIS roles, but can distinguish between those directly involved in the provision of clinical services; as opposed to support staff, research staff, etc. Ordering clinician, Order communicating clinician.
Clinical Assistant	International Medical Graduates (IMG) who do not qualify for independent practice in the province of Alberta who are employed to provide general, supervised bedside coverage in inpatient units under the Alberta Clinical and Surgical Assistant Program (ACSAP). All clinical assistants are licensed under the College of Physicians and Surgeons of Alberta limited practice registry.	Authorizing Prescriber
Clinical Associate	Independently licensed physician and member of the Medical Staff with privileges who works alongside a specialist, most often a surgeon, to manage the comorbidities of patients. Can be a most responsible physician.	Attending Prescriber, Encounter Prescriber, Authorizing Prescriber
Nurse	This term (no modifiers) includes Registered Nurses, Registered Psychiatric Nurses and Licensed Practical Nurses; all with a regulated scope and college.	Ordering clinician, Order communicating clinician
Nurse Practitioner	An advanced practice nurse licensed by CARNA on the NP registrar whose practice is defined by the Health Professions Act. NPs work in collaborative Physician-NP teams or independently assume responsibility for overall care.	Prescriber roles
Allied Health	The Allied Health Professional Practice and Education portfolio defines Allied Health by member disciplines: audiology, occupational therapy, physiotherapy, psychology,	Prescriber (limited)

Label	Description	CIS Mapping
	recreation therapy, respiratory therapy, social work, speech-language pathology, spiritual care, and therapy assistant. Providers from these disciplines work across service sectors and the continuum of care.	