

Roster Reconciliation Instructional Guide

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About the Tool

The Roster Reconciliation Tool was developed by Dr. Kevin Brophy and Dr. Alex Duong with support from the Ontario Medical Association (OMA), and the Section on General and Family Practice (SGFP). The purpose of the Excel-based Roster Reconciliation Tool is to help physicians and their teams identify discrepancies between their EMR patient roster and the Ministry of Health (MOH) roster. OntarioMD (OMD) developed instructions for using the Roster Reconciliation Tool, EMR searches to complement the tool, and assembled all these components into a convenient toolkit for physicians.

The Roster Reconciliation Tool works with patient roster files extracted from QHR ACCURO®, TELUS CHR, TELUS PS Suite (PSS), and OSCAR Pro EMRs.

Who Can Benefit from the Toolkit

- Family physicians working in rostered primary care models (FHO, FHG, FHN)
- Clinic administrators responsible for roster management
- OMD Advisors or practice facilitators supporting clinicians to improve their roster accuracy
- Ontario Health Team (OHT) partners assisting in enrollment cleanup

Why Roster Reconciliation Matters

Accurate patient rostering and regular reconciliation are vital for maintaining panel accuracy and ensuring patients are properly attached to care. Proactive roster reconciliation helps physicians maintain a clear understanding of their patient panel, supports high-quality primary care delivery, appropriate resource allocation, and optimized remuneration.

Roster reconciliation also reduces administrative burden, improves data quality, and ensures that reports and performance metrics reflect the most current patient information.

Before You Begin

Working from the computer where roster reconciliation activities will take place, you will need:

- **Internet access**
- **Microsoft Excel (desktop version, Windows PC)** installed
Note: The tool contains macros that may not work on older Excel versions, web-based Excel, or on MAC computers.
- **EMR access and permissions** to download/import and run EMR reports. The feature depends on your EMR system:
 - OSCAR Pro: Report by Template (RbT)
 - QHR ACCURO®: Query
 - TELUS CHR: Analytics Dashboard
 - TELUS PSS: Search
- **Login credentials and permissions** to download roster files from the Ministry of Health (MOH) via the Medical Claims Electronic Data Transfer (MC EDT) system, accessed through the [OPS BPS Secure](#) portal (formerly GO Secure).

Note: Depending on your EMR, some clinics may be able to access MOH roster files directly from their EMR billing modules (if available in your EMR).

- **Download and extract the zipped Roster Reconciliation Toolkit** to your local computer.

Toolkit Contents

- The main folder, **Roster Reconciliation**, contains:
 - **Subfolders:**
 - EMR Report
 - MOH Report
 - Reconciliation Cleanup – TO DO
 - **Help File:** Roster Reconciliation Instructional Guide
 - **Roster Reconciliation Tool 1.2.xlsm (Microsoft Excel Based Tool)**
 - **EMR Search Files:**
 - OMD Roster Reconciliation-EMR Report - OSCAR PRO
 - OMD Roster Reconciliation-EMR Report - TELUS PSS

Note: After importing or saving applicable search files into your EMR, you may delete them from your locally saved **Roster Reconciliation** folder.

EMR Users of:

- **QHR ACCURO® Query:** Download **OMD** Roster Reconciliation-EMR Report from the ACCURO® Alert Publisher.
- **TELUS CHR Analytics:** Define and run the analytics dashboard within the EMR each time you require a new EMR Report (see EMR Report section).

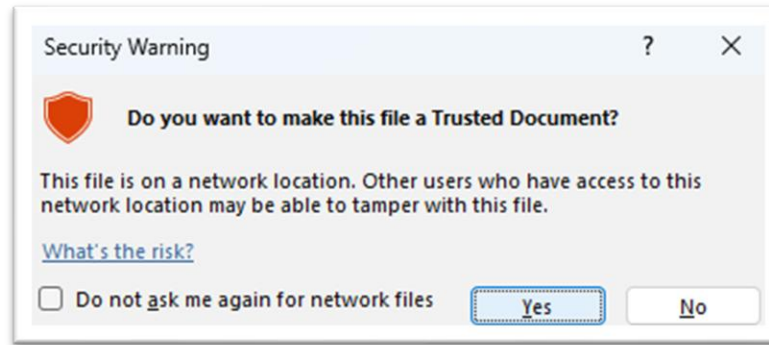
Files needed to run the Roster Reconciliation activities include:

- Active, rostered patient list by physician exported from the EMR
- Recent roster capitation report from the Ministry of Health (MOH)
- Roster Reconciliation Tool

Roster Reconciliation Tool Security Set Up

- Navigate to your extracted **Roster Reconciliation** folder.
- Right click the Excel tool file, select **Properties**, check **Unblock**, then click **Apply** and **OK**.
- Open the file in Excel. If you are prompted with a security warning that **some active content is disabled**, click **Enable Content** > (if prompted) and click **Yes** to make the file a trusted document





- Save and close the file, then reopen it to confirm no further security warnings appear.

EMR Report Preparation

Use your EMR to create individual lists of **active, rostered patients** for each provider who requires roster reconciliation.

Important: Select Your EMR System

This section is organized by individual EMRs. Please navigate to the subsection relevant to your EMR system:

- OSCAR PRO
- QHR ACCURO®
- TELUS CHR
- TELUS PSS

The EMR Report tools created by OntarioMD for TELUS PSS, QHR ACCURO® and OSCAR PRO include default criteria that should be modified to match your clinic's **Patient Status** and **Roster Status** definitions. TELUS CHR users will need to create a report in their EMR aligned with these definitions.

Tip: When updating EMR Report tool criteria, using **IS** or **Equals** is generally more precise than **Contains** to avoid non-relevant statuses where a word appears within another status (if applicable to your EMR).

Tip: After the initial roster clean up, as a supplemental step, clinics may wish to also run an EMR search for all patients or all active patients assigned to a physician who are not rostered/enrolled, and process results through the roster reconciliation tool to help flag potential enrollment opportunities.

The EMR Report exported from your EMR will save as CSV or TXT files and will need to be converted to an Excel Workbook (XLSX) before importing it into the **Roster Reconciliation Tool**.

To easily distinguish between CSV, TXT and XLSX files, **enable file extensions** in your folder view: File Explorer > View > Show > File name extensions.

Important: Ensure all exported reports are handled securely, managed appropriately, and deleted in accordance with your organization's policies and privacy guidelines. Confirm the download location and consult IT if needed. It's recommended to test the export first using **test patient data**.

OSCAR PRO: Report by Template (RbT)

Import the Report by Template (RbT) included in the Roster Reconciliation Toolkit, then generate and export the EMR report.

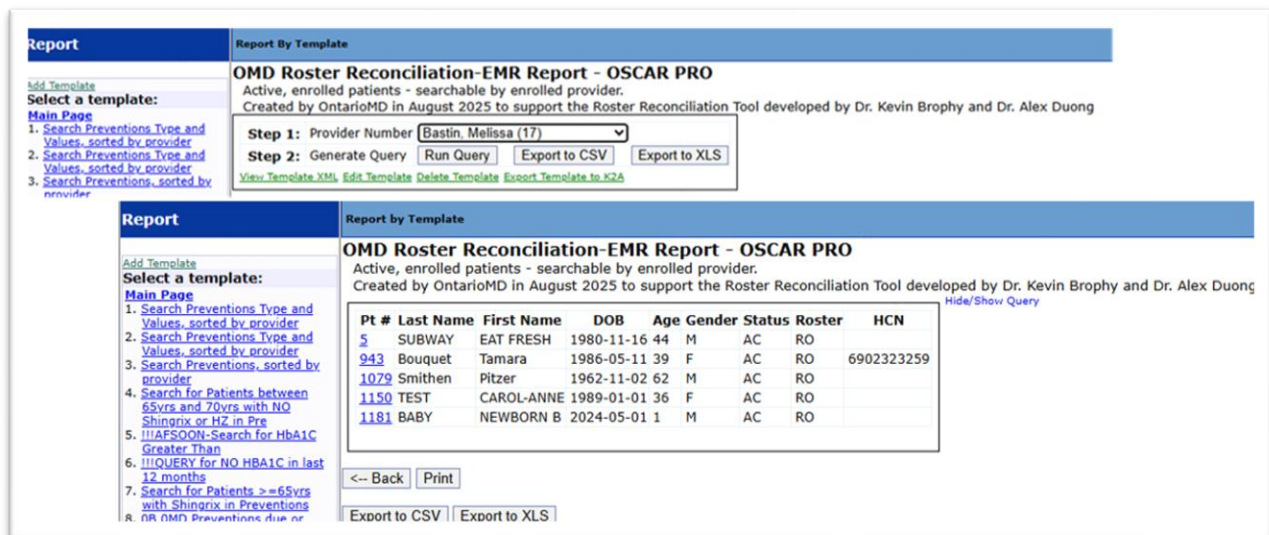
Reminder: After successfully importing or saving the applicable search files into your EMR, you may delete them from your locally saved **Roster Reconciliation** folder.

Tip: Enable **File name extensions** in folder view to easily distinguish between CSV and XLSX files.

Import the Report by Template (RbT), Generate and Export the EMR Report in OSCAR PRO

Important: Before exporting, make sure you know where the report will download on your device. If uncertain, check with your IT team and run a test export with **test patient data** before proceeding.

1. In OSCAR PRO, from the main menu, click **Administration > Reports > Report by Template (RbT)**.
2. In the **Report by Template (RbT)** window, click **Add Template > Choose File**
3. Browse to and open your locally saved **Roster Reconciliation** folder, select the **OMD Roster Reconciliation-EMR Report – OSCAR PRO.TXT** > click **Open > Upload & Add**.
If successful, a **Saved Successfully** message will display in the **Report by Template (RbT)** window.
4. Locate and select the downloaded Report by Template (RbT) in the list, choose the physician to reconcile from the **Provider Number** dropdown > click **Run Query**.
5. To export the patient list, click **Export to CSV**.



Report by Template

OMD Roster Reconciliation-EMR Report - OSCAR PRO
Active, enrolled patients - searchable by enrolled provider.
Created by OntarioMD in August 2025 to support the Roster Reconciliation Tool developed by Dr. Kevin Brophy and Dr. Alex Duong

Step 1: Provider Number **Bastin, Melissa (17)**

Step 2: Generate Query **Run Query** **Export to CSV** **Export to XLS**

[View Template XML](#) [Edit Template](#) [Delete Template](#) [Export Template to K2A](#)

Pt #	Last Name	First Name	DOB	Age	Gender	Status	Roster	HCN
5	SUBWAY	EAT FRESH	1980-11-16	44	M	AC	RO	
943	Bouquet	Tamara	1986-05-11	39	F	AC	RO	6902323259
1079	Smithen	Pitzer	1962-11-02	62	M	AC	RO	
1150	TEST	CAROL-ANNE	1989-01-01	36	F	AC	RO	
1181	BABY	NEWBORN B	2024-05-01	1	M	AC	RO	

[-- Back](#) [Print](#)

[Export to CSV](#) [Export to XLS](#)

6. Locate the downloaded CSV file on your computer and move the file to the **EMR Report** subfolder inside your locally saved **Roster Reconciliation** folder.
7. This CSV file will need to be converted to an Excel workbook (covered in next section).

Convert the OSCAR PRO EMR Report

Important: Ensure all exported reports are securely handled, managed, and deleted according to your organization's policies and privacy guidelines.

1. **Navigate to the EMR Report subfolder** in your locally saved **Roster Reconciliation** folder.
2. **Open the CSV in Excel**
 - a. **Option 1:** Double-click the CSV file and confirm the data appears in separate columns.

If you require further assistance, please contact OntarioMD at 1-866-744-8668 or support@ontariomd.com.

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b. **Option 2:**

- i. Open Excel > click **Data** > select **Import from Text/CSV**.
- ii. Navigate to your **EMR Report** subfolder.
- iii. Select the CSV file and confirm the data appears in separate columns.
*If column layout is incorrect, use the **Transform Data** option to adjust formatting.*
- iv. Click **Load**.

3. **Save as Excel Workbook**

- a. Once the data displays correctly, click **File** > **Save As**.
- b. Rename the file (optional i.e.: DR. X - Aug - Converted), choose Excel workbook (*.XLSX) as the file type, and save it in the EMR Report subfolder.

[Next step: Ministry of Health \(MOH\) Roster Capitation Report Download](#)

QHR ACCURO®: Query

Download query **OMD Roster Reconciliation-EMR Report** created by OntarioMD from the QHR ACCURO® Alert Publisher.

Tip: Enable **File name extensions** in folder view to easily distinguish between CSV and XLSX files.

Download the Query in QHR ACCURO®:

1. In Accuro, click the **Accuro Menu** > hover on **Reports** > click **Query Builder (Alerts)**.
2. In the **Alert Definitions** window, click the **Cloud** icon (Alert Publisher).
3. In the **Alert Definition Publisher** window, type **Roster Reconciliation** into the Search field.
4. In the **Publisher** field, select **OntarioMD**.
5. Click the **magnifying glass** to search the repository.
6. Highlight the query to download.
7. Click **Download Alert**.
8. Click **OK** when you see the **Alert downloaded successfully** message.

Modify and Run the Downloaded Query in QHR ACCURO®:

Tip: When updating EMR Report tool criteria, using **IS** or **Equals** is generally more precise than **Contains** to avoid non-relevant statuses where a word appears within another status (if applicable to your EMR).

1. In Accuro, click the **Accuro Menu** > hover on **Reports** > click **Query Builder (Alerts)**.
2. In the **Alert Definitions** window, find and select the downloaded query **Roster Reconciliation**.
3. **Modify query criteria** to match your clinic's **Patient Status** and **Roster Status** definitions:

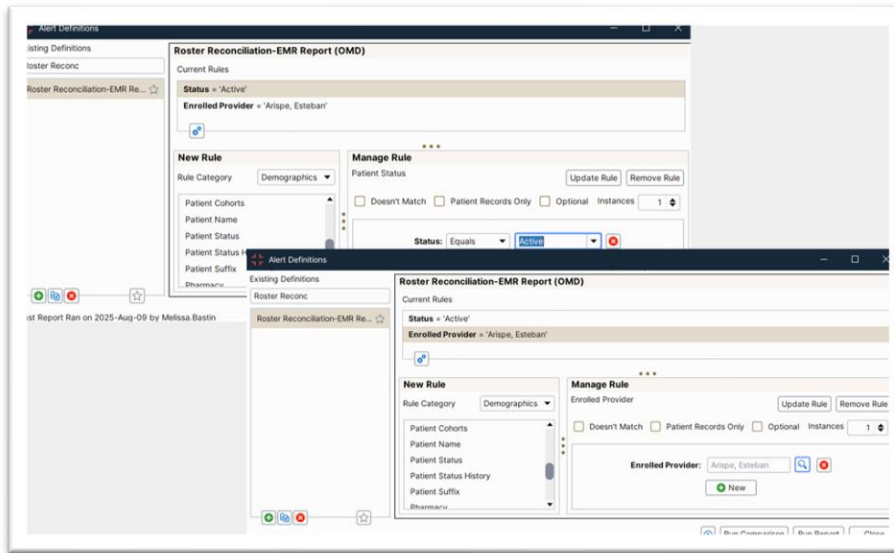
To update Patient Status (default is Active):

- Click the rule for **Patient Status** to select it.
- Click the magnifying glass icon, search or select your clinic's patient status(es), and click **Update Rule**.

To update Enrolled Provider:

- Click the rule for **Enrolled Provider** to select it.
- Choose your physician from the dropdown and click **Update Rule**.

Note: Avoid filters like **Contains: Active** which would include inactive patients.



- Once the query is updated for your clinic, click **Run Report > Run**.
- Upon completion, a patient list matching the query criteria will display in the **Alert Matches** which you will need to export (covered in next section).

Export the QHR ACCURO® EMR Report

Important: Before exporting, make sure you know where the report will download on your device. If uncertain, check with your IT team and run a test export with **test patient data** before proceeding.

- With the Alert Matches/patient list for your rostered physician displayed, click **Export**

Alert Matches									
Last Name	First Name	PHN	Birthdate	Sex	Home Phone	Status	Enrolled Provider Last Name	Office Provider Last Name	
Albers	Andreas	4446961817nf	12/20/1961	F	(416) 281-6317	Unassigned	Arispe	Arispe	
Alexandre	Tabetha	7372780374sb	10/03/1937	F	() - - -	Unassigned	Arispe	Arispe	
Alien	Eddy	8119485517	11/05/1925	F	(519) 888-9999	Unassigned	Arispe	Arispe	
Anda	David	4517623554KD	07/22/1955	M	(000) 000-0000	Unassigned	Arispe	Arispe	
ANDREW	Susannah	8780461706zg	04/09/1955	F	() - - -	Unassigned	Arispe	Arispe	
Ankrum	Lesa	5813830865tu	01/19/1982	F	() - - -	Unassigned	Arispe	Arispe	
Aperges	Neville	2759890961ws	04/01/1957	M	() - - -	Unassigned	Arispe	Arispe	
Applebottom	Jean	3801653552LL	03/25/1923	F	() - - -	Unassigned	Arispe	Arispe	
Ault	Shayna	3484451301by	04/22/1975	M	() - - -	Unassigned	Arispe	Arispe	
Aunalle	Mummy	7776936037gl	09/14/1942	M	() - - -	Unassigned	Arispe	Arispe	
Babberoni	Pearl	0231967749vh	06/23/1944	F	() - - -	Unassigned	Arispe	Arispe	
Babula	Andreas	3805984683rn	12/11/1933	F	() - - -	Unassigned	Arispe	Arispe	
Bache	Carmin	9837502708gi	08/16/1986	F	(416) 897-5642	Unassigned	Arispe	Arispe	
Ballard	Steve	1981981928	12/17/2017	M	(905) 202-3910	Unassigned	Arispe	Arispe	

260 Matches - Select Action - [Completed] [Rerun] [Print All] [Export] [Close]

- In the **Export Result** window:
 - Deselect **Encrypt** > click **No** when prompted to confirm.
 - Click the **Ellipsis (...)** icon, find and open the **EMR Report** subfolder inside your locally saved **Roster Reconciliation** folder.
 - Enter a **File Name** for your output file (i.e.: DR. X - Aug) > click **Open**.
 - Click **Export** > if successful, an **Export Completed** message will appear > click **OK**.

Note: Ensure you are saving to your local computer, not the QHR ACCURO® server or session.

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3. A CSV version of the EMR report should now be in the EMR Report subfolder.
4. This CSV file will need to be converted to an Excel workbook (covered in next section).

Convert the QHR ACCURO® EMR Report

Important: Ensure all exported reports are securely handled, managed, and deleted according to your organization's policies and privacy guidelines.

1. **Navigate to the EMR Report subfolder** in your locally saved **Roster Reconciliation** folder.
2. **Open the CSV in Excel**
 - a. **Option 1:** Double click the CSV file and confirm the data appears in separate columns.
 - b. **Option 2:**
 - i. Open Excel > click **Data** > select **Import from Text/CSV**.
 - ii. Navigate to your **EMR Report** subfolder.
 - iii. Select the CSV file and confirm the data appears in separate columns.
*If column layout is incorrect, use the **Transform Data** option to adjust formatting.*
 - iv. Click **Load**.
3. **Save as Excel Workbook**
 - a. Once the data displays correctly, click **File** > **Save As**.
 - b. Rename the file (optional i.e.: DR. X - Aug - Converted), choose Excel workbook (*.XLSX) as the file type, and save it in the EMR Report subfolder.

[Next step: Ministry of Health \(MOH\) Roster Capitation Report Download](#)



TELUS CHR: Analytics Dashboards

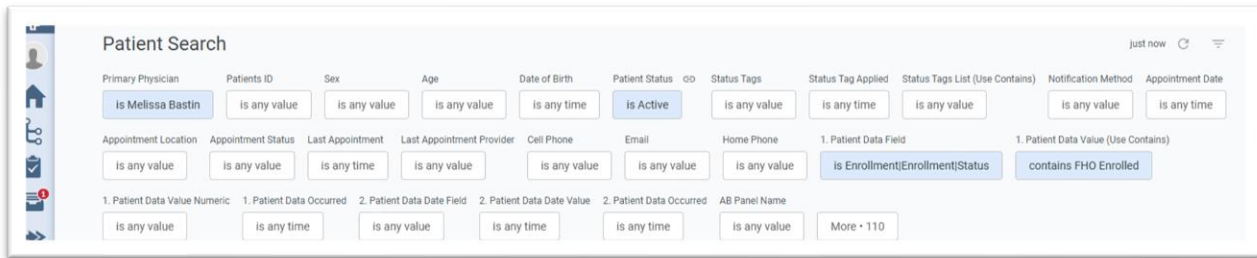
Within the Analytic Module of the EMR, define analytic dashboard filters, generate and export the EMR report.

Tip: Enable **File name extensions** in folder view to easily distinguish between CSV and XLSX files.

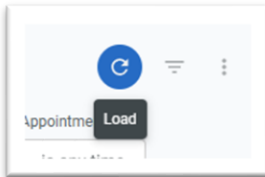
Define Analytic Dashboard Filters, Generate and Export the EMR Report in TELUS CHR

Important: Before exporting, make sure you know where the report will download on your device. If uncertain, check with your IT team and run a test export with **test patient data** before proceeding.

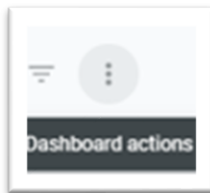
1. In TELUS CHR, from the main menu, click **Analytics**  
2. Under **Dashboards**, search for and select **Patient Search**.
3. The **Patient Search** and filters will load.
4. Set the **Patient Search Filters** as follows:
 - **Primary Physician:** choose **IS** and select the physician to reconcile from the **any value** dropdown
 - **Patient Status:** choose **IS** and select **Active** or your clinic's equivalent, from the **any value** dropdown
 - **1. Patient Data Field:** choose **IS**, start typing **Enrollment** and select **Enrollment|Enrollment|Status** from the **any value** dropdown.
 - **1. Patient Data Value:** choose **Contains**, start typing **Enrollment** and select the enrollment status(es) matching your clinic's definitions from the **any value** dropdown.



- With the filters applied, click the **Load** or **Reload** icon to generate the patient list.



- To export the patient list, click the **menu icon (Dashboard Actions)**.



- In the **Download Patient Search** window, select **CSV** as the format > click **Download**.
- Locate the downloaded zipped CSV file on your computer, unzip/extract it, and move the extracted search report (**patient_search.csv**) to the **EMR Report** subfolder inside your locally saved **Roster Reconciliation** folder.
- This CSV file will need to be converted to an Excel workbook (covered in next section).

Convert the TELUS CHR Analytics Dashboard EMR Report

Important: Ensure all exported reports are securely handled, managed, and deleted according to your organization's policies and privacy guidelines.

- Navigate to the EMR Report subfolder** in your locally saved **Roster Reconciliation** folder.
- Open the CSV in Excel**
 - Option 1:** Double click the CSV file and confirm the data appears in separate columns.
 - Option 2:**
 - Open Excel > click **Data** > select **Import from Text/CSV**.
 - Navigate to your **EMR Report** subfolder.
 - Select the CSV file and confirm the data appears in separate columns.
If column layout is incorrect, use the **Transform Data** option to adjust formatting.
 - Click **Load**.
- Save as Excel Workbook**
 - Once the data displays correctly, click **File** > **Save As**.
 - Rename the file (optional i.e.: DR. X - Aug - Converted), choose Excel workbook (*.XLSX) as the file type, and save it in the EMR Report subfolder.

[Next step: Ministry of Health \(MOH\) Roster Capitation Report Download](#)

TELUS PSS: Search

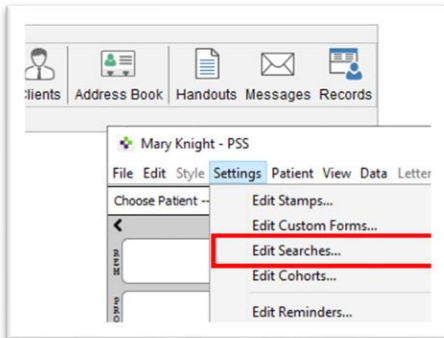
Import the search included in the Roster Reconciliation Toolkit then generate and export the EMR report,

Reminder: After successfully importing or saving the applicable search files into your EMR, you may delete them from your locally saved **Roster Reconciliation** folder.

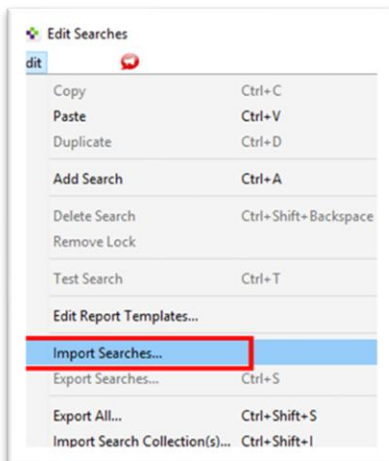
Tip: Enable **File name extensions** in folder view to easily distinguish between CSV, TXT and XLSX files.

Import the Search in TELUS PSS:

1. In TELUS PSS, from the **Records** window, click **Settings > Edit Searches**.



2. In the new window that opens, click **Edit > Import Searches**.



3. Using the dropdown menu, find and open your locally saved **Roster Reconciliation** folder, select **OMD Roster Reconciliation-EMR Report – TELUS PSS.srx**.
4. Click **Choose**.
5. Once imported, a window will display **Successfully Imported**.
6. Click **OK**.

Modify and Run the Downloaded Search in TELUS PSS:

1. In TELUS PSS, from the **Records** window, click **Settings > Edit Searches**.
2. Locate and select the downloaded search in the list.
3. **Modify search criteria** to match your clinic's **Patient Status** and **Roster Status** definitions:

To update Patient Status (default is Active):

- Click the rule for **Patient Status** to select it.
- Click **Edit Line**, select your clinic's patient status from the dropdown.
- Click **OK**.

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To update Roster Status (Member Status):

- Click the rule for **Member Status** to select it.
- Click **Edit Line**, choose the **Roster Status (Member Status)** your clinic uses from the dropdown.
- Click **OK**.

The screenshot shows two overlapping windows from the Roster Reconciliation Toolkit.

The top window, titled "Edit Searches", displays a search rule named "OMD Roster Reconciliation-EMR Report - TELUS PSS". The rule is defined as "Patient Status = Active and Member Status = FHO Enrolled". Below the rule definition are buttons for "Delete Line", "Indent Line ->", "Edit Line...", and "<- Outdent Line". A "Comments" field at the bottom states: "Created by OntarioMD August 2025 - supports Roster Reconciliation Tool created by Drs. Brophy & Duong".

The bottom window, titled "Edit Search Criterion", is open for the "Patient Status" criterion. It shows a list of search criteria on the left, including "Demographics", "Patient Profile", "Visits", "Vitals", "Immunizations", "Treatment", "Allergies", "CPP Problems", "CPP Past Medical History", "CPP Family History", "CPP Risk Factors", "Lab Values", "Lab Text", "Diagnostic Imaging", "Diagnostic Test Reports", and "Consultation Report". The "Patient Status" criterion is selected. On the right, the criterion is set to "not = Active" with a dropdown menu showing "Active" and a checkbox for "Ask When Run".

The screenshot shows the 'Edit Search Criterion' dialog box in the Roster Reconciliation Toolkit. The dialog has a left pane with a list of search criteria categories: Demographics, Patient Profile, Visits, Vitals, Immunizations, Treatment, Allergies, CPP Problems, CPP Past Medical History, CPP Family History, CPP Risk Factors, Lab Values, Lab Text, and Diagnostic Imaging. The 'Member Status' criterion is selected. The right pane shows the selected criterion's details: 'FHO Enrolled' (selected from a dropdown) and an unchecked 'Ask When Run' checkbox. The main window in the background shows the 'Search Name' as 'OMD Roster Reconciliation-EMR Report - TELUS PSS' and the search criteria as 'Patient Status = Active and Member Status = FHO Enrolled'. The 'Perform Search...' button is visible at the bottom of the main window.

4. Click **Perform Search**.

This screenshot shows the same Roster Reconciliation Toolkit interface as the previous one, but with the 'Perform Search...' button highlighted with a blue border. The 'Edit Search Criterion' dialog box is still open, showing the same search criteria. The main window's 'Perform Search...' button is the focus of this step.

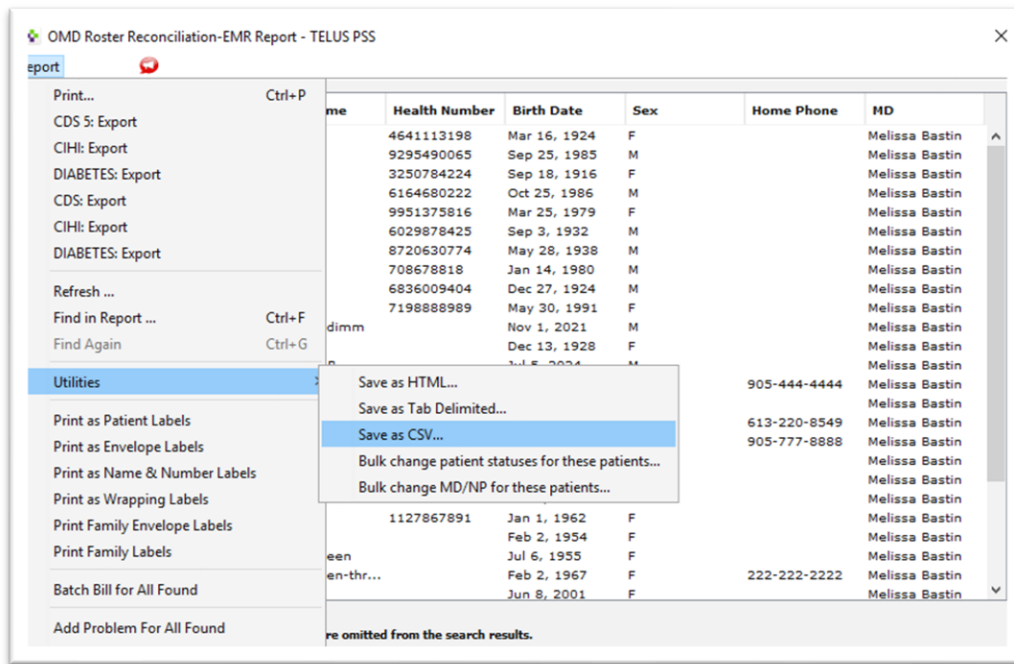
5. **Uncheck All Doctors** and select the Doctor to reconcile.

6. Click **Search**.

Export the TELUS PSS EMR Report

Important: Before exporting, make sure you know where the report will download on your device. If uncertain, check with your IT team and run a test export with **test patient data** before proceeding.

1. With the patient list for your rostered physician displayed, click **Report > Utilities > Save as CSV**.
Note: The EMR outputs a TXT file rather than CSV; its file extension will be changed to CSV in the next steps.



2. In the **Save list as** window:
 - a. Find and open the **EMR Report** subfolder inside your locally saved **Roster Reconciliation** folder.
 - b. Enter a **File Name** in the Object Name field (i.e.: DR. X - Aug) > click **Save**.

Note: If you use remote desktop to access TELUS PSS, ensure you save to your local computer - not the TELUS PSS server or session - or move the saved file afterward to the **EMR Report** subfolder inside your locally saved **Roster Reconciliation** folder.

3. A TXT (or CSV) version of the EMR report should now be in the EMR Report subfolder.
4. This TXT file will need to be changed to CSV, then converted to an Excel workbook (covered in next section).

Convert the TELUS PSS EMR Report

Important: Ensure all exported reports are securely handled, managed, and deleted according to your organization's policies and privacy guidelines.

1. **Navigate to the EMR Report subfolder** in your locally saved **Roster Reconciliation** folder.
2. **Change the file extension from TXT to CSV.**
3. **Open the CSV in Excel:**
 - a. Double click the CSV file to open in Excel.
 - b. Confirm the data appears in separate columns.
 - c. Delete the blank top row (if present).
4. **Save as Excel Workbook.**
 - a. Click **File > Save As**.
 - b. Rename the file (optional i.e.: DR. X - Aug - Converted), choose Excel workbook (*.XLSX) as the file type, and save it in the EMR Report subfolder.

[Next step: Ministry of Health \(MOH\) Roster Capitation Report Download](#)

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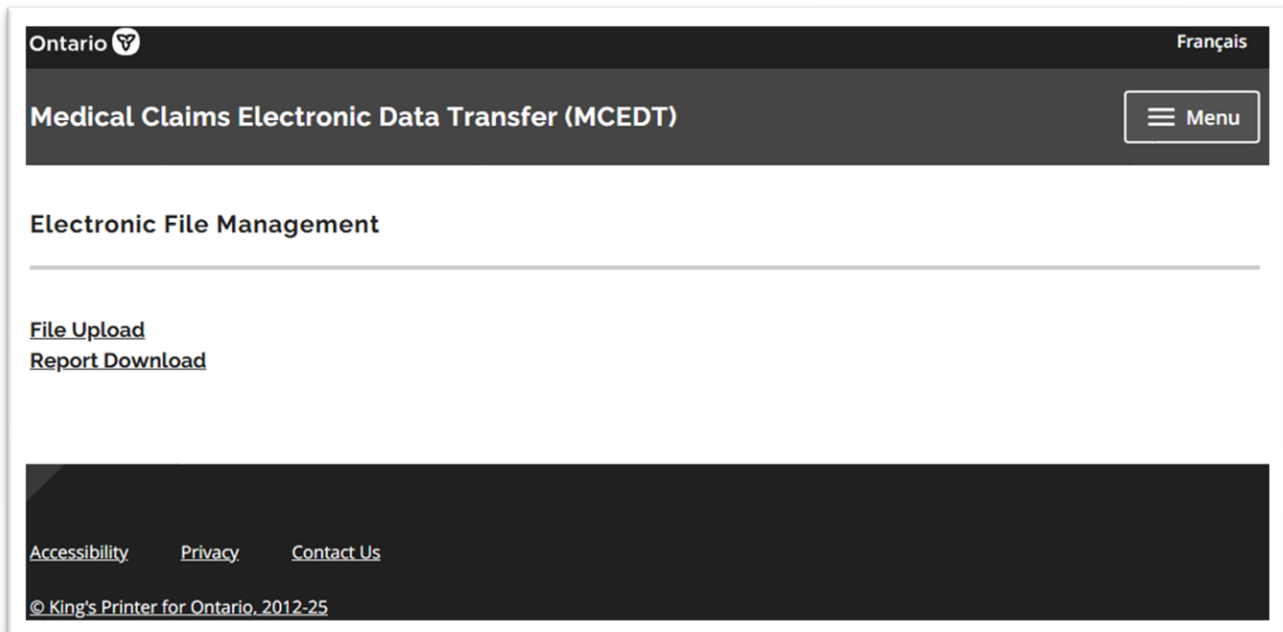
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Ministry of Health (MOH) Roster Capitation Report Download


The Ministry of Health (MOH) Roster Capitation files can be downloaded from the **OPS BPS Secure** portal (or accessed directly from your EMR if available).

Follow these steps to download the required Roster Capitation file(s):

1. Log in to the Medical Claims Electronic Data Transfer (MC EDT) system via the [OPS BPS Secure](#) portal.
2. Select the **MC EDT Service (Report Download)** option.



3. In the dropdown menus, select the **Physician Name/Billing Number** to reconcile and the **MC EDT Service (Upload/Download)** > click **Access Service**.
4. Locate the physician's most recent **Roster Capitation Report (XML format)**.
5. Click **Download** and save the **XML file** to the **MOH Report** subfolder within your **Roster Reconciliation** folder (if it downloads automatically, locate it on your computer and move it there).

Ontario  Français					
Medical Claims Electronic Data Transfer (MCEDT) Menu					
Electronic File Management					
Available Reports					
Page 1/9 First Previous Next Last					
List of Reports/Files for Ministry ID					
File Type	Subject	File Name	Date	Status	Download
BE	Batch Edit	BH001234.123	2025-08-22	Available	Download
BE	Batch Edit	BH005678.123	2025-08-07	Available	Download
RCX	Roster Capitation Report XML	RCX-000000-OBAMR-S-6Aug2025.xml	2025-08-06	Available	Download
CO	EC Outside Use report	LH001492.777	2025-08-06	Available	Download
RCP	Roster Capitation Report PDF	RCX-000000-OBAMR-S-6Aug2025.pdf	2025-08-06	Downloaded	Download

6. Repeat the process for each physician to reconcile.

Tip: The **Roster Capitation Report(s)** include the physician's billing number in the file name. To avoid confusion, you can save it with a clear name such as Dr. X-Roster-Aug2025.xml when downloading.

Important: The Roster Capitation Report is available as both a PDF and an XML file. The Roster Reconciliation tool requires using the XML version.

Roster Reconciliation Tool Usage

Important: Before starting, ensure macros/content are enabled, unblock/trust the file (see [Roster Reconciliation Tool Security Set Up](#)), and you are running the tool from your local computer.

1. Open the **Roster Reconciliation Tool** in Excel.
2. Click **Select EMR file** > browse to the **EMR Report** subfolder > select your converted **EMR Report Excel workbook (.XLSX)** > click **OK**.
If successful, an **EMR File path saved** message will appear, and path will be displayed on the spreadsheet.
3. Click **OK**.
4. Click **Select MOH file** > browse to the **MOH Report** subfolder > select your Roster Capitation Report (XML) > click **OK**.
If successful, a **File path saved** message will appear, and path will be displayed on the spreadsheet.

If you require further assistance, please contact OntarioMD at 1-866-744-8668 or support@ontariomd.com.

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5. Click **OK**.
6. Enter the column header names from your **EMR Report** for patient name and health card number into the fields **Field with Name** and **Field with HN** (*must match exactly*).

Column Header Names by EMR (Using the OntarioMD EMR Report Tools)

EMR	Field with Name	Field with HN
OSCAR PRO	Last Name	HCN
QHR ACCURO®	Last Name	PHN
TELUS CHR	Patient Full Name	Patient Identification Value
TELUS PSS	Surname	Health Number

7. Click **Extract** to load the data.
If successful, you will see the following in sequence:
 - **MOH XML data extracted and table created successfully**, and the path will be displayed on the spreadsheet > click **OK**.
 - EMR Report briefly opens and closes.
 - **EMR data processed successfully (VBA method)** > click **OK**.
 - **Data extraction completed successfully** > click **OK**.
8. Once extraction is successful, click **Compare** to run the reconciliation.
9. Upon completion, three patient lists will populate the **Roster Reconciliation** worksheet.
10. **Save the roster cleanup lists:**
File > Save a Copy (or Save As) in the **Reconciliation Cleanup – TO DO** subfolder.
(i.e.: Dr. X - roster cleanup to do – Aug2025)
11. The saved copy of the physician's roster cleanup file will be in the **Reconciliation Cleanup – TO DO** subfolder for later review or delegation.

Important: Ensure all exported reports are handled securely, managed appropriately, and deleted in accordance with your organization's policies and privacy guidelines.

12. **Reset the tool** for new use:
 - Reopen the tool from your locally saved **Roster Reconciliation** folder; the data should be cleared.
 - If not, click **Clear All Data**.
 - If the issue persists, confirm the cleanup report was saved to the **Reconciliation Cleanup – TO DO** folder; if not, regenerate and resave it.
13. If needed, repeat the process for new reconciliation tasks.

Roster Reconciliation Tool V1.2

By: Dr. Alex Duong and Dr. Kevin Brophy
Apr-25
Supported by: OMA, OntarioMD, SGFP

Step 1: Select your EMR roster file by pressing the button below and selecting the file. This should be an excel file.

Select EMR file

Path: C:\Melissa.Bastin\Desktop\Roster Reconciliation\EMR Report\Dr. Melissa Bastin - Aug 2025.xlsx

Step 2: Select your MOH roster file. This should be an XML document

Select MOH file

Path: C:\Melissa.Bastin\Desktop\Roster Reconciliation\MOH Report\Dr. Melissa Bastin - Aug 2025.xlsx

Step 3: For the section of "Field with Name", enter the title of the column you want to use for the patient name (ie. "Patient Full Name").
For the section of "Field with HN", enter the title of the column that contains the health card number (ie. "Patient Identification Number")
Click Extract and this will import the EMR file and MOH file to output sheets at the bottom of this excel document.

Extract

Field with Name: **Last Name**
Field with HN: **PHN**

Now verify that the output data looks correct.

Step 4: Now let's compare the MOH roster and your EMR file, by clicking the compare button

Compare

Clear all Data

Explanation
 "In EMR Roster, but not in MOH roster" means you can consider looking at that patient and considering rostering them by submitting q200.
 "In MOH roster, but not in EMR roster" means the ministry considers them rostered to you and you may need to consider submitting a de-rostering code.
 "Terminated" means that patient has come off your roster list for various reasons (ie. Deroster code submitted, rostered with another, left province).

In EMR Roster, but not in MOH roster		In MOH roster, but not in EMR roster		Terminated	Patient Name	Term Code	Member Days
Health Num	Patient Name (EMR)	Health Num	Patient Name (MOH)	Health Number			
1234567891	Redpoll	3641988753	Falcon				
9876543215	Blackcap	5479624958	Cooper				
5479325876	Warbler	2589631479	Peregrine				
6479214896	Thrush	5975325876	Merlin				
2857296541	Hawk	4697312871	Krestel				
1597538524	Kingbird	3697412584	Mockingbird				
3479687654	Sparrow	9675864231	Raven				
		1764893525	Woodlark				

Reviewing and Acting on Findings

The Roster Reconciliation Tool produces three output lists to guide your follow-up actions, including:

- Patients on your EMR roster who are **not found on the MOH roster** (per EMR search criteria)
(possible de-rostered patients or incorrectly marked as rostered in the EMR)
- Patients on the MOH roster who are **not enrolled/rostered in your EMR** (per EMR search criteria)
(may require re-enrollment, review for potential billing errors, or updating of EMR record for roster)
- Recent roster termination(s)

Review these lists carefully with your clinic team. Follow up as needed - this may include patient contact, enrollment updates, or billing adjustments.

Tip: Many physicians perform roster reconciliation quarterly or semi-annually as a best practice for panel management.

Tip: After the initial roster clean up, as a supplemental step, clinics may wish to also run an EMR search for all patients or all active patients assigned to a physician who are not rostered/enrolled, and process results through the roster reconciliation tool to help flag potential enrollment opportunities.

Additional Resources & References

- OPS BPS Secure portal. Access to Ministry of Health MC EDT system. <https://bps.ops.gov.on.ca>
- Dr. Kevin Brophy & Dr. Alex Duong. Developers of the Roster Reconciliation Tool, supported by the Ontario Medical Association (OMA), OntarioMD, and the OMA's Section on General and Family Practice (SGFP).
- OntarioMD. *Roster Reconciliation Toolkit*, including EMR Report Tools, Roster Reconciliation guidance, and the Roster Reconciliation Tool (developed by Brophy & Duong) for OSCAR PRO, QHR ACCURO®, TELUS CHR, and TELUS PSS. Available on [OMD Educates](#).