Accessing the Ministry
Web Business Services

Web Business Services
Training Scenarios

Eligibility, Demographics
& PHN Assignment

An introduction for new users

March 2000
Version 1.0
Scenario Summary

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About this Guide

Purpose and Audience

This document is intended to be a self-study training guide for new healthnetBC web users who have access permission to the Eligibility, Demographic and PHN Assignment business services provided by the Ministry of Health Services.

Prerequisites

This training guide assumes that users are familiar with their organization’s web browser and with the Windows operating environment.

Web Business Services User Support Documentation

The healthnetBC Web Business Services User Support Documentation includes Working on the Web - A Guide for New Users. We recommend that all new users read this guide as part of their orientation to the healthnetBC web business services and become familiar with the content prior to accessing the production site. This guide provides important information on confidentiality requirements, the production site address, how to sign on for this first time, how to change passwords, what to do if you forget your password, how to get help and some tips on working with the menus and screens. A User Profile section is provided for each user to complete and keep on hand for when they need to call the healthnetBC Help Desk for assistance.
What You Need to Know

The training environment is available daily from 7:00am to 11:00pm (PST) except:

- Thursday midnight to 8:00am and Sunday 6:00am to 9:00am for system maintenance
- Short duration outages for emergency maintenance may be experienced:
  - Monday to Saturday
    - 10:30am – 10:45am
    - 1:30pm – 1:45pm
    - 5:00pm – 5:10pm
  - Sunday 8:00pm – 11:00pm

The training environment is refreshed nightly. This means that any changes made to the database during your training session will not exist the next day.

An * (asterisk) denotes a mandatory field. If you leave a mandatory field blank, you will receive an Error Message.

Using Enter on your keyboard may submit the transaction; otherwise you must click Submit. This depends on the type of web browser you have.

The cursor does not move to the next field automatically. Use your mouse or tab between fields.

Alpha characters can be upper or lower case (they are not case sensitive, except in the userid and password fields. These must be keyed exactly as shown). The following characters are invalid in alpha fields:

", <> ; : { } ( ) * & $ # % @ ! ~ \ ^ ? _ 0 1 2 3 4 5 6 7 8 9 |

For your convenience, dates on the input screens have been defaulted to the current date. Overtype to change.

A comprehensive set of User Guides provides business rules, interface and form completion details. This information will soon be available as On Line Help.
Report all problems to the healthnetBC Help Desk.

<table>
<thead>
<tr>
<th>Region</th>
<th>Telephone Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vancouver and lower mainland</td>
<td>(604) 682-2316</td>
</tr>
<tr>
<td>Victoria</td>
<td>(250) 952-2293</td>
</tr>
<tr>
<td>Rest of BC</td>
<td>1-888-764-2323</td>
</tr>
<tr>
<td></td>
<td>(Toll-Free available ONLY in BC)</td>
</tr>
</tbody>
</table>

The healthnetBC Help Desk is available 24 hours per day, 7 days per week to accept, log, and resolve problems. The level of support may be limited outside of regular business hours.

**Signing On**

Open your Netscape or Internet Explorer browser and go to the training environment URL:

http://hnwe1.moh.hnet.bc.ca/

Training ID:  **trainphn** (key exactly as shown)

Password:  **hntrain2** (key exactly as shown)

If the ID and password combination do not work, contact the Help Desk.
1 Checking Patient Eligibility

Use the Check Eligibility and Get Person Demographics business services to check a patient’s eligibility for publicly funded health care services, and to confirm that their name and address are correctly recorded with the Ministry.

1.1 Eligible Patient

The Check Eligibility business service will confirm eligibility for the date submitted. The date automatically defaults to the current date. Key over the date fields to check eligibility for another date.

**Check Patient Eligibility**

1. Select Eligibility & PHN Assignment from the Main Menu
2. Select Check Eligibility
   - Enter PHN: 9151068486
3. Click Submit
   - Beneficiary on Date Checked? = Y
   - Patient is eligible for publicly funded health care services on date checked.

**Confirm Patient Name & Address**

1. Select Get Person Demographics from Next Business Service link
2. Paste or Enter PHN: 9151068486
3. Click Submit
   - The system will display the most current demographic information recorded on the Ministry’s database.

Copy the PHN (highlight PHN & "CTRL C", or highlight PHN, right mouse click & copy, or use “Edit” on toolbar to copy)
**Next Business Service:**

These buttons at the bottom of each response screen provide a convenient link to the next business service that you may want to use, i.e.

- Select **Update Person Demographics** to change patient information.
- Select **Update Person Address** to change address information.

### 1.2 Ineligible Patient

The **Check Eligibility** business service will provide a message explaining why the person is not eligible on the date checked.

1. **Check Patient Eligibility**
2. Enter PHN: 9151071968
3. Click Submit

**Beneficiary on Date Checked? = N**
Patient is not eligible for publicly funded health care services on date checked for reason given.

**Additional scenarios:** Use your browser's "Back Button" to take you back to the **Check Eligibility** business service and try the following PHN's to see other reasons for ineligibility:

- 9512917805 Residency in question.
- 9151083529 Opted out of publicly funded health care.
- 9151086857 Canada Health Act exclusion (e.g. RCMP, Armed Forces) requiring third party billing.
1.3 Multiple Eligibility Checks

Use **Personal Health Number (PHN) Inquiry** to check the eligibility and person demographics of several patients (up to 10 at one time), for the day the transaction is submitted. For example, a hospital admissions clerk may want to check the eligibility of several patients scheduled for admission later that day.

**Check Multiple Patient Eligibility**

1. Select **Personal Health Number (PHN) Inquiry** from Next Business Service link, or from the Eligibility & PHN Assignment Menu

2. Enter the following PHNs: (use your "Tab Key" to move between each field on the screen)
   - 9151075159
   - 9151067975
   - 9151072028

3. Click Submit

The system will display patient demographic information and Eligible? Y or N indicator for each PHN

**Note:**

* If you need to check a patient’s address, select the **Get Person Demographics** business service from the Next Business Service link.

* If you need to know why a patient is ineligible, use the **Check Eligibility** business service from the Eligibility & PHN Assignment Menu.
2. Finding a Patient’s PHN

Use **Name Search** when a patient does not have their CareCard and does not know their PHN and/or is unable to provide accurate demographic information (injury, language etc.). You can search for their PHN with a minimum amount of information.

You can use a variety of combinations of their surname, initials, gender, full birth date and/or birth year only to search the database for their PHN.

### 2.1 Search with name, initial, birth date & gender

1. **Search for PHN**
   (using surname, initials, birth date & gender)

2. Enter person information:
   - Surname: Spring
   - First Name: P
   - Birth date: 1965 09 15
   - Gender: Female
   (use your “Tab Key” to move between fields)

3. Select Narrow Search Type

4. Click Submit

   Patricia Spring’s PHN is 9151271801

**Note:**

* Search Results are displayed in order of surname, first name, second name and “CURRENT RECORD” or “PREVIOUS RECORD”. “CURRENT RECORD” indicates that this is the most current information available. “PREVIOUS RECORD” reflects previous information stored for the patient prior to a more recent change. Use the **Get Person Demographics** business service to confirm the most current demographic data for the patient.
The Personal Health Number (PHN) is located below the name, following gender and date of birth (year, month, day format).

A Wide (Phonetic) Search Type may be used if a Narrow (Direct) Search has been unsuccessful. It is used to search for a name that “sounds like” the Surname entered. It will find Surnames that have been misspelled, or may have a hyphen, apostrophe or space in them, such as O’Brien, Obrien, O Brien, O’Brian, Mc Donald, MacDonald etc.

Next Business Service:

> Copy the PHN and select **Check Eligibility** from Next Business Service link to confirm eligibility
2.2 Search for a patient’s PHN using surname, gender and birth year only.

Using the client’s birth year only in the birth date field will return all persons with the same surname and gender, born within +/- 5 years.

**Search for PHN**
( using surname, gender, & birth year only)

1. Select Name Search from the Next Business Service link, or from the Eligibility & PHN Assignment Menu.

2. Enter person information:
   - Surname: Lazar
   - Initial: A
   - Birth date: 1923
   - Gender: Male

3. Select Narrow Search Type

4. Click Submit

The system returns three matches within +/- 5 years of the year of birth.

Confirm patient demographics to ensure you select the correct PHN for your patient.

Copy the PHN for Arthur Lazar.

**Next Business Service:**

⇒ Select Check Eligibility from Next Business Service link to confirm eligibility.
3 Assigning a PHN to a Patient

Use **Record New Person** when a patient requires health services and does not have a PHN.

*Everyone receiving health services in BC requires a PHN. You must assign a PHN to a patient if they are not already recorded with the Ministry of Health Services. Recording a PHN for a person through this business service does not imply that they are eligible for publicly funded health care services. The person must be a resident of BC and be enrolled in the Medical Services Plan to be eligible.*

3.1 Assign a PHN

**A Name Search** must always be done first to confirm that a PHN does not already exist for this person, however for the purpose of this training scenario, assume that you have already completed a **Name Search** and no record was found.

**Assign a PHN**

1. Select **Record New Person** from the **Next Business Service** link, or from the **Eligibility & PHN Assignment Menu**.
2. Enter your own person demographics, (or use a fictional person) and record your address information as requested on the form. Try omitting the postal code for this example.
3. Click **Submit**. A Best Guess address will be returned. Choose the Best Guess address and Click **Submit** again to ensure that a PHN is assigned.

The system will display the person's new PHN and the address you submitted.

**Note:**

* do not include any punctuation when entering the address
* when keying a postal code do not include any spaces i.e.: V8W9R1
* the address you submit using this business service is automatically validated against the Canada Post Corporation (CPC) standard. When an address is incomplete or invalid, the system suggests a Best Guess address. You should submit the Best Guess address unless you are certain that the Best Guess address is inappropriate.

* if you use the Check Eligibility business service using the new PHN, you will note that a message is returned stating “Party Does Not Exist”. This indicates that the person is not enrolled as a beneficiary with MSP and is therefore not eligible for publicly funded health care services. Assigning a PHN does not enroll a person with MSP.
4 Assigning a PHN to a Newborn

Use Record Newborn to record a newborn in the Health Registry and assign the baby a PHN at the time of birth.

All babies born in a BC hospital must be assigned a PHN. Newborns whose mothers are residents of BC, are automatically eligible for publicly funded health care services for the first three months of their lives. The parents or guardians must still enroll their child as a beneficiary with MSP to ensure continued eligibility following the automatic three-month period.

4.1 Record a newborn when mother’s PHN is known.

1. **Confirm mother’s PHN**
   - **Use Get Person Demographics from Next Business Service link, or from the Person Demographic Menu to confirm the mother’s PHN and identity.**
   - Enter mother’s PHN: 9151264085

2. **Click Submit**
   - **Review mother’s information to confirm accuracy. Copy mother’s PHN.**

1. **Assign a PHN to a Newborn**
   - **Select Record Newborn from the Next Business Service link or the Eligibility & PHN Assignment Menu**

2. **Enter:**
   - Baby’s Surname: Potts
   - Baby’s first name: select Baby Girl A
   - Birth date: today (default)
   - Paste Mother’s PHN: 9151264085

3. **Click Submit**
   - The system will display the baby’s new PHN.
Next Business Services:

- Copy the PHN and select **Get Person Demographics** to view the baby's newly entered record. Note that the baby has automatically been assigned the mother's address.

Note:

* If the mother's PHN is unknown, and there is no record of the mother found after completing a **Name Search**, you would use **Record New Person** to assign a PHN to the mother first and then proceed to **Record Newborn** to assign a PHN to the baby.
5 Checking Person Demographics

Use Get Person Demographics to confirm the most current person demographics recorded on the Health Registry for a patient.

5.1 Verify that the demographic data recorded for a patient is correct.

Next Business Service:

→ If applicable, Copy the PHN and select Update Person Address or Update Person Demographics to update the patient’s record.
6 Update Patient’s address

Use Get Person Demographics and Update Person Address to confirm and update a patient’s address information on the Health Registry.

6.1 The patient has moved and you need to update their home address.

1. Check Current Address
   - Select Get Person Demographics from Next Business Service link, or from the Person Demographic Menu.
   - Enter PHN: 9151075048
   - Click Submit
   - Review the current record. Copy the PHN.

2. Update Home Address
   - Select Update Person Address from Next Business Service link, or from the Person Demographic Menu.
   - Paste or Enter PHN: 9151075048
   - Select Address Type: Home and Change the home address to your home address and city.
   - Click Submit
   - If you enter the address to CPC standards, the address change will be SUCCESSFUL. If a BEST GUESS ADDRESS is provided, submit it or your original as appropriate.
6.2 The patient has a mailing address that is different from their home address.

1. Use Get Person Demographics to review the current record. Enter PHN: 9151264085. Copy the PHN from the response screen.

2. Select Update Person Address from Next Business Service link, or from the Person Demographic Menu.

3. Paste or Enter PHN: 9151264085. Select Address Type: Mailing. Enter the new mailing address: PO Box 9622 Stn Prov Govt Victoria BC V8W9P1.

4. Click Submit.

If you enter the address to CPC standards, the address change will be SUCCESSFUL. If a BEST GUESS ADDRESS is provided, submit it or your original as appropriate.
7 Update Person Demographics

Use Get Person Demographics and Update Person Demographics to confirm, update and/or change a patient’s demographic data. ALWAYS update patient information when you find that it is more current than what is recorded. Business Rules apply for when supporting documentation must be recorded.

7.1 Update patient’s personal information.

The patient’s first and second names are incomplete, the day of birth is incorrect and the gender is recorded as “U”. You need to update the patient’s record.

**Confirm Person Demographics**

1. Select Get Person Demographics from Next Business Service link, or from the Person Demographic Menu.
2. Enter PHN: 9151028561
3. Click Submit

Review current record. Initials only, day of birth incorrect, gender unknown. Copy the PHN.

**Update Patient’s Personal Information**

1. Select Update Person Demographics from the Next Business Service link. Paste or Enter PHN: 9151028561
2. Enter Surname: Beckett
   Use your imagination to complete the first and second names (FA), correct the day of birth (you must enter the complete birth date i.e. 1916 04 15) and the gender.
3. Click Submit

The system will display the PHN and message "Successfully Completed"
Next Business Service:

- Copy the PHN and select **Get Person Demographics** to view the changes you have just submitted.

### 7.2 Change patient's personal information.

*If the patient is a beneficiary of MSP, and you change the first initial or first name, second initial or second name, surname, month or year of birth, a CareCard is automatically issued.*

The patient has married and changed her name. You need to record the name change. Recording the supporting documentation as evidence of the change is mandatory.

1. **Select Get Person Demographics from Next Business Service link, or from the Person Demographic Menu**

2. **Enter PHN: 9151082409**

3. **Click Submit.**

   - Review current record to confirm accuracy.
   - Copy the PHN.

**Confirm Person Demographics**

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**Change Patient's Personal Information (new name)**

1. **Select Update Person Demographics from Next Business Service link.**

   - Paste or Enter PHN: 9151082409

2. **Change the person's surname to your surname. You must also enter the first name. (You would normally record the information directly from the document)**

3. **Click Submit**

   - The system will display the PHN and message "Successfully Completed"

* Continued on next page...
Record the Document (Marriage Certificate)

1. Select Record Document from Next Business Service link, or from the Person Demographics Menu.
2. Paste or Enter PHN: 9151082409
   Select document type: Marriage Certificate
   Select Document Jurisdiction: BC
   Select Document medium: Paper
   Select Original Document indicator: Was it the original document or a copy? Can’t tell? unknown
3. Click Submit

The system will display the document type you requested. Complete all fields marked with * using fictitious information for this example. A Date field must be entered in year/month/day format i.e. 2000415.

A marriage certificate Registration Number looks like 198259098365
Appendix

If several people are using the training database at once, some of the PHN’s you try may already have been used. Should this happen, please use this list of alternate PHN’s before contacting the help desk.

<table>
<thead>
<tr>
<th>Scenario</th>
<th>PHN’s</th>
</tr>
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<tbody>
<tr>
<td>1.1</td>
<td>Eligible Patients</td>
</tr>
<tr>
<td>1.2</td>
<td>Ineligible Patient</td>
</tr>
<tr>
<td>1.3</td>
<td>Check eligibility of several patients simultaneously.</td>
</tr>
<tr>
<td>2.1</td>
<td>Search for this PHN with name, initial, birth date &amp; gender (J Mellencamp, M 19510415, 45 Tumbledown Way Vancouver)</td>
</tr>
<tr>
<td>2.2</td>
<td>Search for this PHN using surname, unknown gender and birth year only (Kelsey 1969).</td>
</tr>
<tr>
<td>4.1</td>
<td>Add a newborn</td>
</tr>
<tr>
<td>5.1</td>
<td>Verify that the PHN belongs to the patient</td>
</tr>
<tr>
<td></td>
<td>Description</td>
</tr>
<tr>
<td>---</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>6.1</td>
<td>Update person's home address</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>6.2</td>
<td>Add a new mailing address</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>7.1</td>
<td>Update patient's personal information (name, birth date, gender)</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>7.2</td>
<td>Change patient's personal information (name change).</td>
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<tr>
<td></td>
<td></td>
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</tbody>
</table>