CARD READER INTEGRATION INITIATIVE FOR *CRMS SYSTEM*

Information and implementation guide

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Canadian Mental Health Association Ontario

Association canadienne pour la santé mentale Ontario

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OHIP CARD READER INTEGRATION MANUAL AND TRAINING GUIDE

The purpose of this document is to provide detail information on action items required to successfully implement the card readers into PDS compliant systems for the organizations and HSPs.

(Description of Key Roles and Contacts are enclosed in Appendix A.)

PRODUCT INFORMATION:

The MagTek Centurion Magnetic Card Reader is a USB-connected device designed for reading magnetic stripe cards. For detailed technical specifications, installation instructions, and pricing, refer to the CDW product page linked: [MagTek Centurion Magnetic Card Reader.]

Product Name	MagTek Centurion Magnetic Card Reader USB
Compatibility	USB interface
Power Source	Draws power from the USB connection (no external power required)
Connection Type	USB (Universal Serial Bus)
Drivers/Software	Typically plug-and-play, no additional drivers required for basic functionality on most operating systems
Card Compatibility	Reads magnetic stripe cards (typically used for credit/debit cards, ID cards, etc.)
Security Features	Built-in encryption to protect card data during transfer.
User Manual	SureSwipe Support - MagTek
Manufacturer	MagTek
Additional Features	LED indicator lights for status (e.g., power, data transfer)
Warranty	Manufacturer warranty information (usually included with product documentation)

PURPOSE AND OBJECTIVE:

The primary purpose of using the health card reader is to securely access and retrieve personal health information stored on health cards. The collection of Ontario Health Information Plan (OHIP) card information is an important mechanism for supporting the implementation of PDS. Collecting OHIP at the MHA sector can improve the care clients receive by integrating clinical information to ensure informational continuity and more efficient delivery of services. It can also increase operational efficiency for providers within the MHA sector and streamlining health system planning at the provincial level. To enable more efficient and accurate data collection, CMHA Ontario plans to provide OHIP card readers to Community (MHA) organizations that (1) are using a PDS compliant system and (2) have begun the process of onboarding to the PDS.

CMHA Ontario plans to provide OHIP card readers to the MHA Sector organizations to enable more efficient and accurate data collection. Here is how they generally work and considerations for their use:

Functionality: Health card readers are equipped with technology that can scan and interpret data encoded on health cards. This data often includes personal information such as the individual's name, date of birth, health card number, version code, issue date, and expiry date., which is crucial for accessing client's file in your CMS system.

Data Collection: When a health card is inserted or scanned, the reader extracts the necessary information and transfers it to a CMS system. This allows healthcare providers to quickly access patient information without manual entry, streamlining administrative processes.

Integration: For organizations considering the implementation of health card readers, it's essential to ensure organizations are using a PDS compliant system and (2) have begun the process of onboarding to the PDS. Integration capabilities vary among different vendors.

User Training: CMS Vendors and CMHA will be providing the training materials for staff members on how to use health card readers. This includes understanding how to operate the device, basic functionality with the card readers, and troubleshooting common issues.

COMMUNICATING THE NEW APPROACH TO STAFF

Key Messages for Management to convey to Staff:

- Staff should ask all clients if they have an OHIP card at their point of intake.
- Staff should emphasize to clients that OHIP collection is voluntary, even if a client has an OHIP card, but that it is helpful for improving services in the MHA Sector.
- If a client does not have on OHIP card or has one and declines to show it to branch staff, the client should not be denied services. In this scenario, services should be provided to the client as per usual. MHA staff should use this opportunity to offer clients information on the benefits of having an OHIP card for accessing other types of health services and can direct the client to apply for an OHIP card if they are eligible.
- If a client has an OHIP card and agrees to share it with MHA staff, MHA staff can collect the OHIP card number using the OHIP card reader by scanning the card and updating the client file manually with any additional information.

(Canadian Mental Health Association Ontario [CMHA ON] (Nov 2020). *Community Business Intelligence, OHIP Data Collection and Card Reader Rollout in CMHAs.)*

CHECKLIST TO FOLLOW ON CONNECTING HEALTH CARD READER

Following this checklist will help ensure that you can successfully connect and use a health card reader with your device, facilitating secure access to important health information when needed.

S.NO	IMPLEMENTATION STEP	DESCRIPTION	RESOURCE	STATUS
1	Ordering Card reader	Complete the [Request Form](#) or send an email to pds_support@ontario.cmha.ca for more information.	Online form and email	☐
2	Compatibility check	Verify that the health card reader is compatible with your device (computer, tablet, or smartphone) in terms of operating system, USB, device specifications. Contact the CMS vendor for clarification on compatibility if needed.	Product Manual from Mfg., Training Guide, and Vendor Support	☐
3	Connection Type	Ensure your device has the corresponding port for USB type of connection.	USB Port	☐
4	CMS Updated Version	Make sure that your current CMS version is compliant with card reader	Vendor	☐
5	Turning On Functionality	Once you receive the card reader, contact your vendor to turn on the card reader functionality into your CMS system	Email or raise ticket to your vendor	☐
6	Connect to Device	Plug the health card reader into the appropriate port on your device securely.	OHIP Health Card	☐
7	Recognition and Authentication	Once connected, wait for your device to recognize the health card reader. Follow any prompts on your device's screen for authentication and access permissions.		☐
8	Access Health Information	After connecting, access the health information stored on the card using your CMS system which is integrated with the health card reader.	PDS compliant CMS system	☐
9	Getting started with the card reader	Follow the steps from the guide to navigate through the card reader scanner options in your CMS system.	CRMS Guide	☐
10	Proper Ejection	Before disconnecting the health card reader, ensure you safely eject it from your device to prevent data corruption.		☐

GET STARTED WITH CARD READER ONCE CONNECTED TO YOUR DEVICE:

This information pertains to **Checklist: Step 9**, which is intended to guide you through the functionality of health card readers within the CRMS system.

After connecting the card reader to your device and activating its functionality through your vendors, you can begin swiping OHIP health cards. Please refer to the snapshots provided below to assist you in searching for a client, creating a new client file, and making changes to existing client files in the CRMS system.

Note that CRMS is available in two interface versions: CRMS V3 and CRMS V2. Please use the version that is installed on your device.

CRMS V3

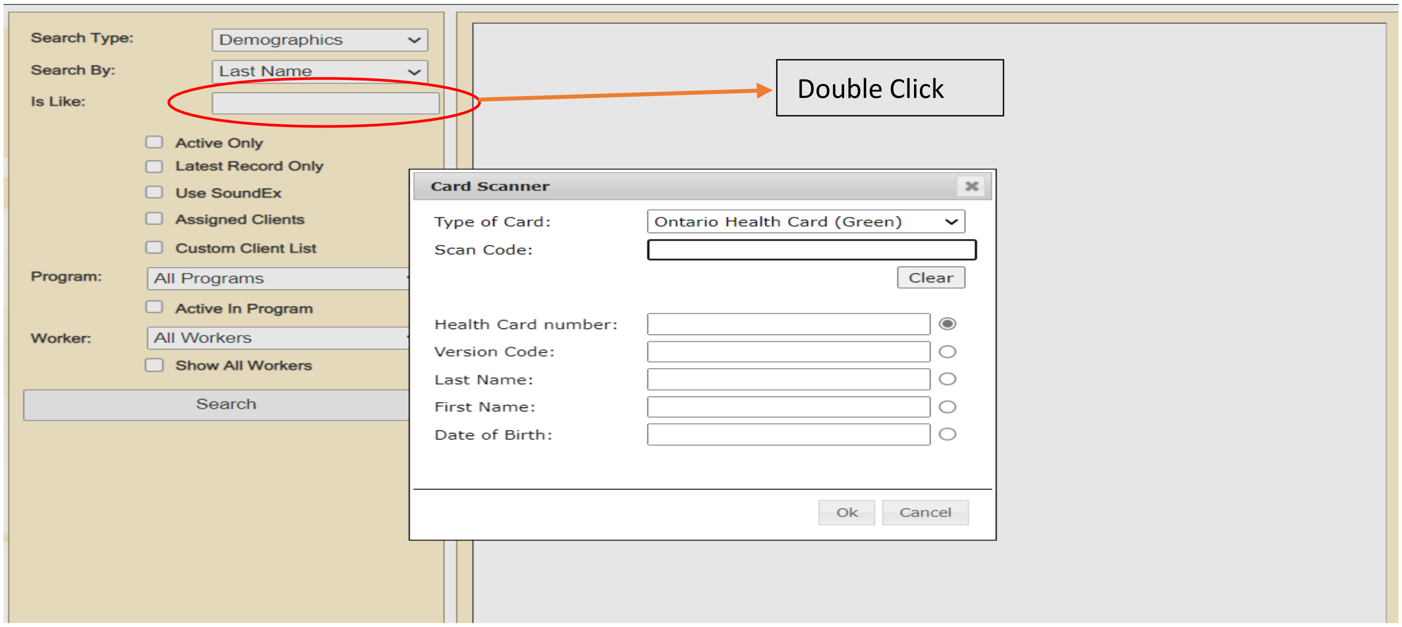
1. Searching the client by swiping the OHIP card into the card reader:

You will need to plug the scanner into your computer. There are three different places you will see the scanner screen. In the CRMS Search Engine you can use the card to Search for a client.

a) If you double click on the **Is Like box** it will pop up a box called **Card Scanner**.

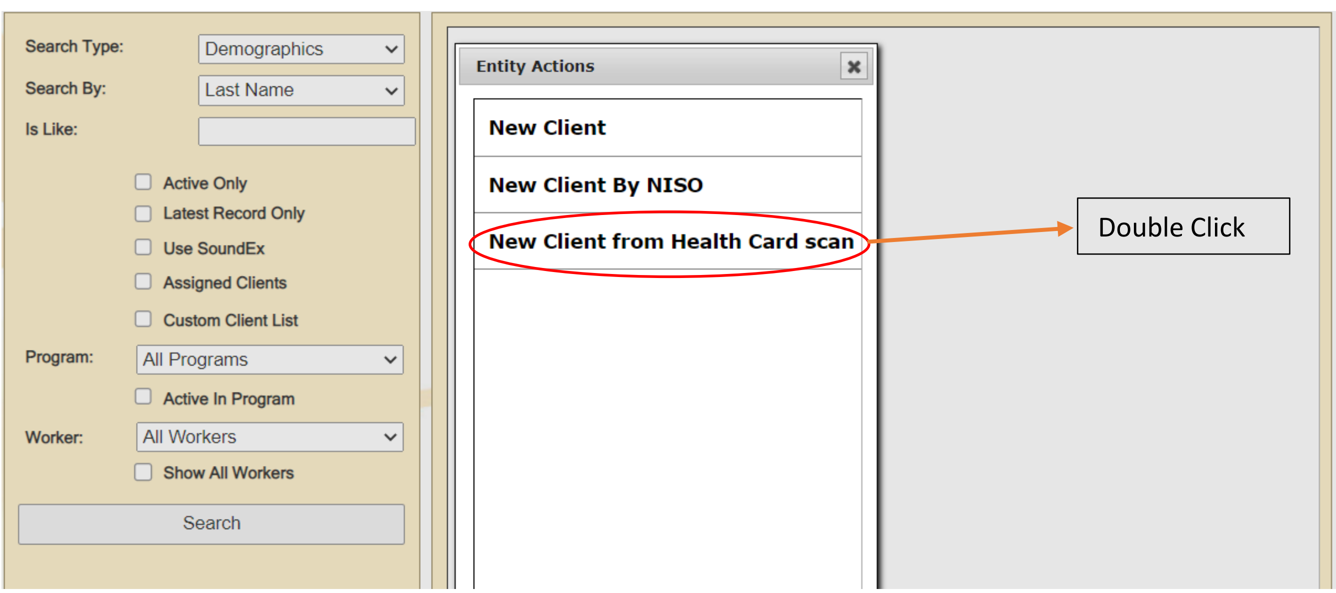
b) Put your cursor in the **Scan Code** field and scan the card in the card reader.
c) If the card reader is successful, it will populate the fields below it.
d) Select which field you want to search with by clicking on the **radio button**.
e) When you click **OK**, it will populate the **Is Like box** with that field.

In the example below, my search by is set to Last Name so I would select the **Last Name** radio button and it will populate the **Is Like box** with the last name from the health card.



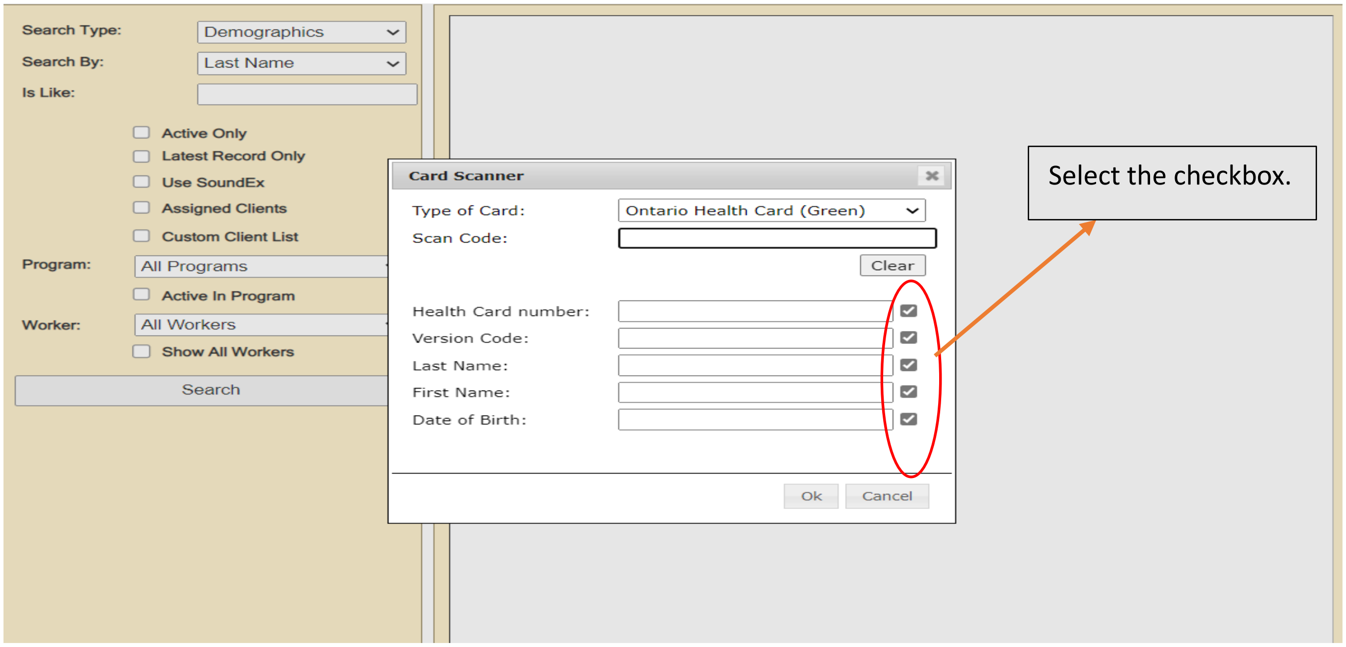
2. Creating a new client file with health card scanner:

The third option is to create a new client with the health card scanner. To do this click in the white space on the CRMS Search Engine (CRMS V3) and select **New Client from Health Card Scan.**



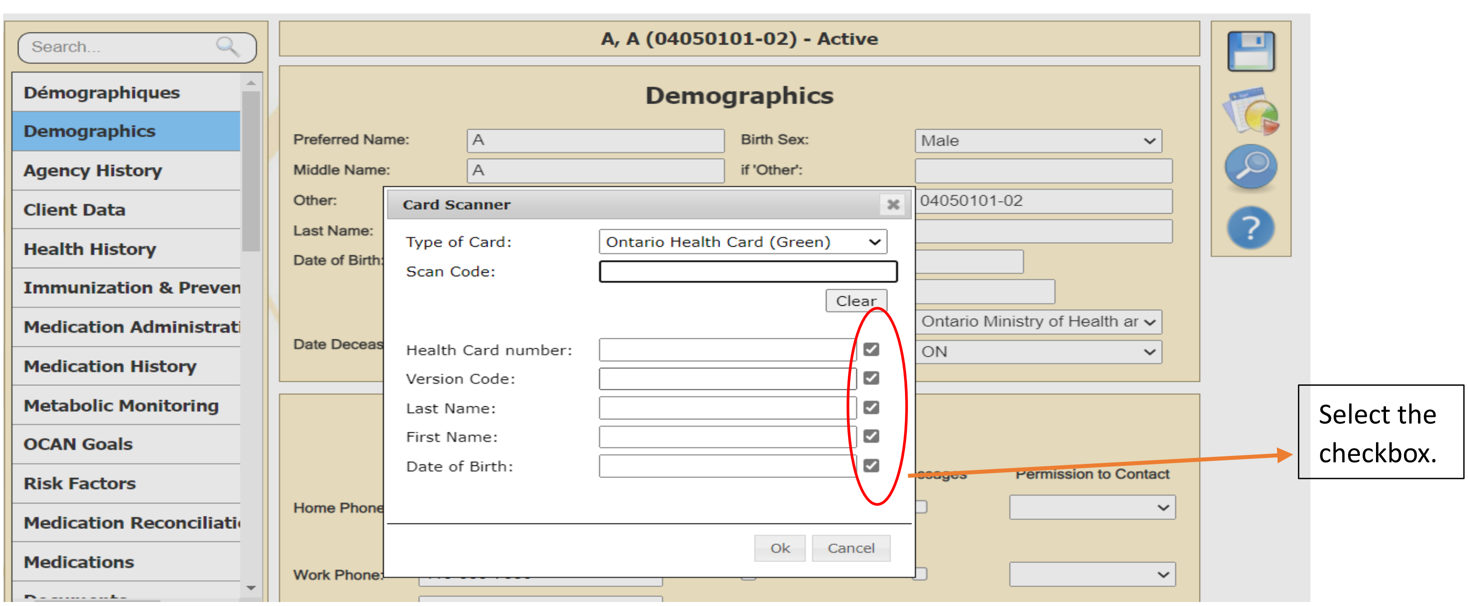
When you select **New Client** from Health Card scanner you will get the same box, except the radio buttons are now checkboxes. Put your cursor in the **Scan Code** box and scan the health card. If the card reader is successful, it will populate the fields below.

To create the client select which fields you would like to populate in the new client's file. Click **OK** and it will open the chart for you to continue to fill out the additional data points.



On the Client Demographics Page, you can double click in the **Health Card** field to launch the **Card Scanner** window. Put your cursor in the **Scan Code** box and scan the card.

If the card scan is successful, it will populate all the fields below. You can check which fields you would like to update in the client's chart by checking the checkboxes beside each field and select **OK** for them to update.



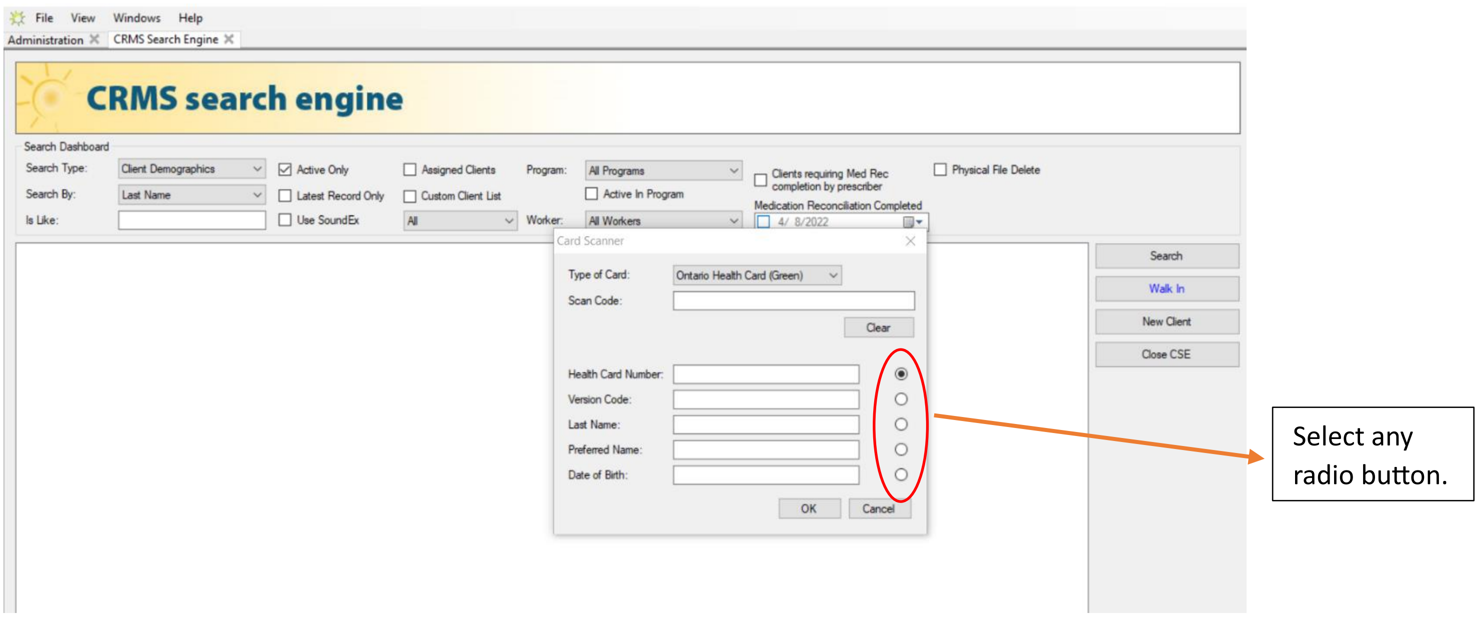
CRMS V2

1. Searching Client's File:

You will need to plug the scanner into your computer. There are two different places you will see the scanner screen. In the CRMS Search Engine you can use the card to Search for a client.

a) If you double-click on the **Is Like box** it will pop up a box called **Card Scanner**.
b) Put your cursor in the **Scan Code** field and scan the card in the card reader.
c) If the card reader is successful, it will populate the fields below it.
d) Select which field you want to search with by clicking on the radio button.
e) When you click **OK** it will populate the **Is Like box** with that field.

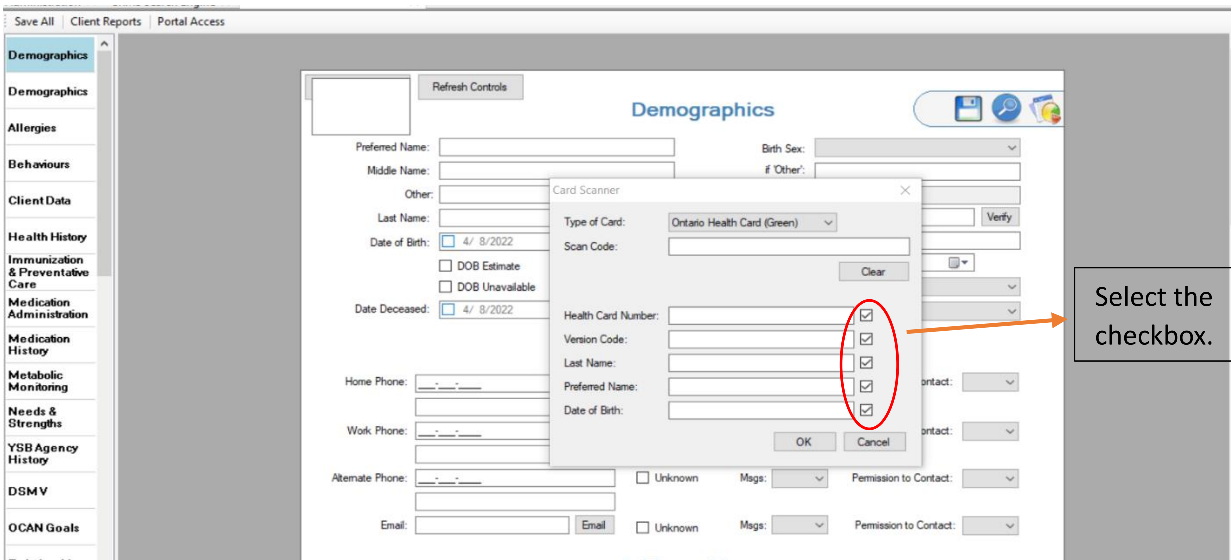
In the example below, search by is set to **Last Name** so we would select the **Last Name** radio button and it will populate the **Is Like box** with the last name from the health card.



2. Updating Client's File:

a) On the **Client Demographics** Page, you can double click in the **Health Card** field to launch the Card Scanner window.
b) Put your cursor in the **Scan Code** box and scan the card.
c) If the card scan is successful, it will populate all the fields below.
d) You can check which fields you would like to update in the client's chart by checking the checkboxes beside each field and select **OK** for them to update.

Please Refer to the below screenshot for the reference.



Frequently Asked Questions (FAQ):

1. Does the Card Reader need additional drivers to be installed prior to connecting it to the device?

Ans: No, card readers do not need any additional drivers to be installed.

2. How long does it take to activate the card reader functionality?

Ans: The activation timeline varies depending on your vendor and the specific CMS system. Please contact your vendor directly for detailed information regarding the timeline to activate the functionality.

3. Are there any fees associated with ordering card reader?

Ans: No, card readers are provided free of charge by Ontario Health as a one-time purchase. In the future, if you require additional card readers for your organization, you will need to purchase them independently.

4. Is training required for staff to use the health card reader effectively?

Ans**:** Yes, training is essential to ensure staff understand how to operate the health card reader, interpret the data retrieved, and integrate this information into the CMS system accurately. Please connect with the CRMS team to schedule a 1:1 training section on card reader integration.

5. What steps should we take if the health card reader malfunctions or encounters technical issues?

Ans: In case of technical issues, you should first refer to the user manual or troubleshooting guide provided by the manufacturer. If issues persist, contact technical support provided by your CMS Vendor or your IT department to diagnose and resolve the problem promptly. Refer to the *Appendix-A* to get contact information on CRMS team.

6. What types of health cards can the reader handle, and how does it verify patient information?

Answer: Health card readers can only handle OHIP Health Cards provided by the Government of Ontario. The reader verifies client's information by reading encoded data on the card, such as Client's first and last name, DOB, health card number and version code.

7. How can we ensure a smooth transition and adoption of the health card reader system among our staff and patients?

Ans: Plan for comprehensive training sessions for staff, communicate the benefits of the system to patients, provide user-friendly instructions for patient use, and offer ongoing support to address any concerns or issues that arise during the transition period.

Appendix A

Key Roles & Contacts

Client Management System Vendor – Will facilitate the development and implementation of the technical solution within your client management system. They are your main contact for technical issues pertaining to testing, go-live and regular PDS Data Uploading.

CMHA Ontario PDS Leads – Overseeing the comprehensive implementation of health card readers across the entire province, taking charge of integrating the card readers into the CMS system and providing full support throughout the integration process.

Client Management System Vendor Contact	**CRMS:** Naomi Hurtubise naomi@crms-software.com **Helpdesk (CRMS)** support@crms-software.com **EMHWare:** Jamal Tekleweld jtekleweld@emhware.com Sam Roworth sroworth@emhware.com **Vitalhub (Treat):** Ryan Sia ryan.sia@vitalhub.com **Vitalhub (Caseworks):** George Evink George.Evink@vitalhub.com **Helpdesk (Vitalhub)** help@vitalhub.com.
CMHA Ontario Leads	**PDS Support email:** pds_support@ontario.cmha.ca **Saif Shaik Abdul** sshaikabdul@ontario.cmha.ca