



Health Card Reader

Agenda

- How it Works
- Implementation
- Testing

Benefits

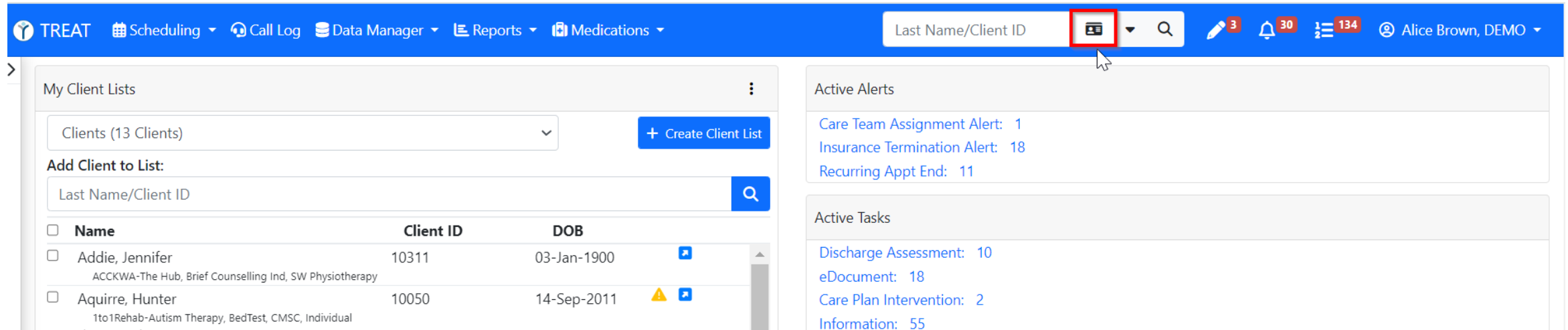
- Efficient way to search for a client within TREAT
- Automatic client matching
- Automatic population of information in *Demographics* for new clients
- Automatic update of information in *Demographics* for existing clients

NOTE:

- *Only Ontario OHIP Health Cards are supported*
- *The functionality does not determine the validity of a Health Card against the OHIP Database*

HOW IT WORKS

Client Search



The screenshot shows the TREAT software interface. The top navigation bar includes 'TREAT' and several menu items: 'Scheduling', 'Call Log', 'Data Manager', 'Reports', and 'Medications'. On the right side of the navigation bar, there is a search field labeled 'Last Name/Client ID' with a scan card icon highlighted by a red box. To the right of the search field are icons for editing (3), notifications (30), and a list icon (134). The user profile 'Alice Brown, DEMO' is also visible.

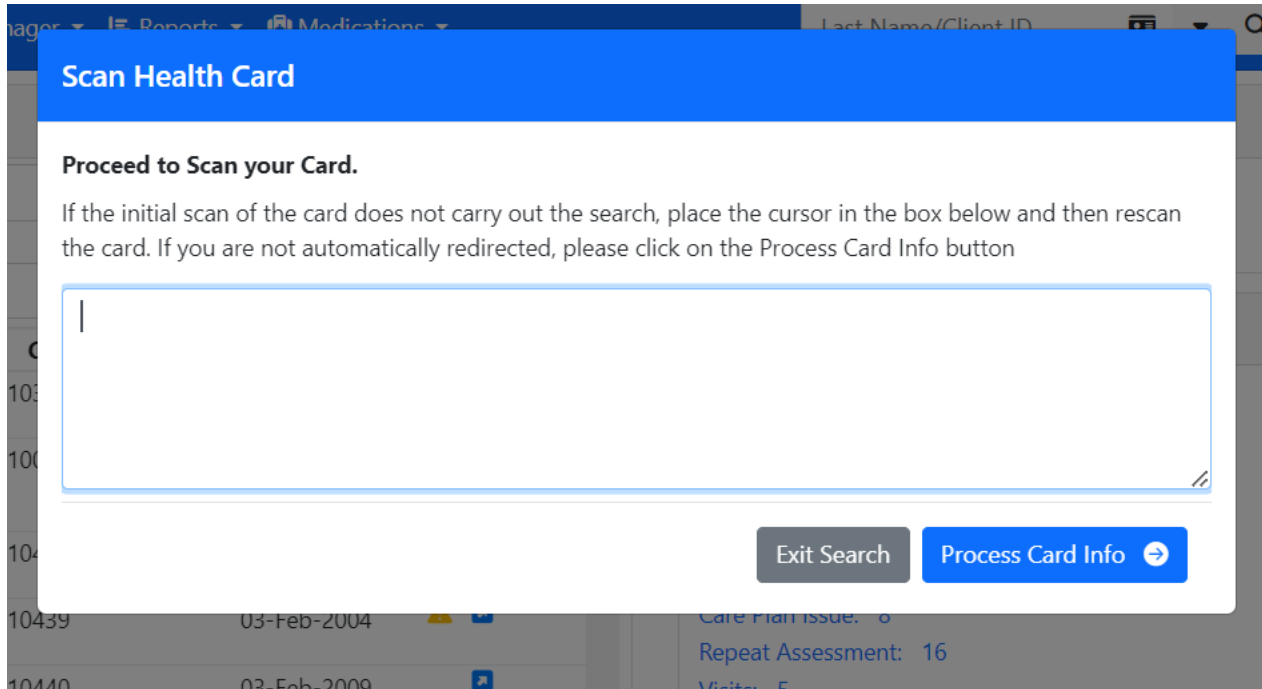
Below the navigation bar, the 'My Client Lists' section shows a dropdown menu for 'Clients (13 Clients)' and a '+ Create Client List' button. The 'Add Client to List:' section has a search field for 'Last Name/Client ID' with a search icon. Below this is a table of clients:

<input type="checkbox"/>	Name	Client ID	DOB	
<input type="checkbox"/>	Addie, Jennifer ACCKWA-The Hub, Brief Counselling Ind, SW Physiotherapy	10311	03-Jan-1900	
<input type="checkbox"/>	Aquirre, Hunter 1to1Rehab-Autism Therapy, BedTest, CMSC, Individual	10050	14-Sep-2011	

On the right side, the 'Active Alerts' section shows: 'Care Team Assignment Alert: 1', 'Insurance Termination Alert: 18', and 'Recurring Appt End: 11'. The 'Active Tasks' section shows: 'Discharge Assessment: 10', 'eDocument: 18', 'Care Plan Intervention: 2', and 'Information: 55'.

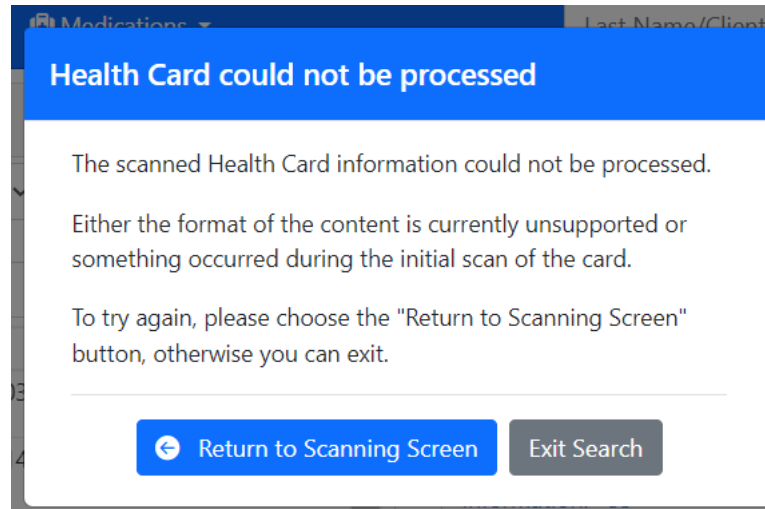
- Click on the scan card icon within the client search field

HC Scan



- Swipe the client's Health Card in the card reader
- The screen should redirect
 - If not, click the PROCESS CARD INFO button

HC Invalid



- If there is a problem an error message is displayed
 - Click RETURN TO SCANNING SCREEN to retry
 - Click EXIT SEARCH to exit the HCN search

HC Processed

Search Results

Card Details:

Client Name	Gender	DOB	Health Card Number
STEPHEN MITCHELL	M	31-Jan-1920	1234567890

You now have the option to either create a new client in TREAT based on the scanned contents of the Health Card, or select/update an existing client record (if the client already exists in TREAT).

Select one of the existing matched TREAT clients below (if any)

Potential TREAT Matches

Client Name	Gender	DOB	Phone	Health Card Number
<input checked="" type="radio"/> Test ZZTest	M	29-Dec-2023	--	1234567890

Exit Health Card Search

Confirm Selection →

- The client's name, gender, date of birth, and health card number are displayed onscreen

Match Found

Search Results

Card Details:

Client Name	Gender	DOB	Health Card Number
STEPHEN MITCHELL	M	31-Jan-1920	1234567890

You now have the option to either create a new client in TREAT based on the scanned contents of the Health Card, or select/update an existing client record (if the client already exists in TREAT).

Select one of the existing matched TREAT clients below (if any)

Potential TREAT Matches

Client Name	Gender	DOB	Phone	Health Card Number
<input checked="" type="radio"/> Test ZZTest	M	29-Dec-2023	--	1234567890

[Exit Health Card Search](#) [Confirm Selection](#)

- All potential matching clients already in TREAT are displayed below, based on a comparison of the health card number, name, or date of birth
- To cancel out, click on EXIT THE HEALTH CARD SEARCH
- If this client is a match, click on CONFIRM SELECTION [\[go to slide 12\]](#)

No Match Found – Register New Client

Search Results

Card Details:

Client Name	Gender	DOB	Health Card Number
STEPHEN MITCHELL	M	31-Jan-1920	1234567890

You now have the option to either create a new client in TREAT based on the scanned contents of the Health Card, or select/update an existing client record (if the client already exists in TREAT).

[Create a new TREAT client record and populate with scanned contents of Health Card](#)

Create new client record

Or...

[Select one of the existing matched TREAT clients below \(if any\)](#)

Potential TREAT Matches

No clients found

[Exit Health Card Search](#) [Confirm Selection →](#)

- If no matching the clients are found, select the *Create new client record* option and then clicking on CONFIRM SELECTION [go to slide 11]

Register New Client

TREAT | Scheduling | Data Manager | Reports | Last Name/Client ID | VitalHub Support, LUMENUS

Demographics

Please complete the following demographic fields to create the new client:

First Name* <input type="text" value="STEPHEN"/>	Last Name* <input type="text" value="MITCHELL"/>	Middle Name <input type="text" value="KEALEY"/>	Mandatory Questions* Known DOB? is a mandatory question. Postal Code is a mandatory question.
Preferred Name? <input type="text"/>	Client ID <input type="text"/>	File Type* <input type="text" value="Client"/>	
Date of Birth <input type="text" value="31-Jan-1920"/>	Known DOB?* <input type="text" value="Select One"/>	Age <input type="text"/>	Edit Checks If Province Code is Ontario, then health card number must be 10 numeric characters with the first 10 digits validated using a MOD-10 check digit number
Estimated Age <input type="text"/>			

- The worker is taken to the *Demographics* screen (in edit mode) with the HC values populated

Confirm Selection

Update Information

Please review the data returned from the scan of the Health Card.

If you wish to update the Client's demographics based on the Health Card information, using the checkboxes below, choose which fields should be updated. If you do not wish to update any data, you can choose to go directly to the Client's Schedule.

	Existing Values	Returned Values	Update?
Health Card Number:	--	--	<input type="checkbox"/>
Version Code:	--	XD	<input type="checkbox"/>
Health Card Expiry Date:	27-Sep-2023	01/25	<input type="checkbox"/>
First Name:	Ben2	STEPHEN	<input checked="" type="checkbox"/>
Last Name:	Test	MITCHELL	<input type="checkbox"/>
Middle Name:	--	KEALEY	<input type="checkbox"/>
Gender:	--	--	<input type="checkbox"/>
Date of Birth:	16-May-1979	31-Jan-1920	<input type="checkbox"/>
Issuing Province:	Nova Scotia	Ontario	<input type="checkbox"/>

[Return to Results Screen](#) [Update & Go to Demographics](#) [Don't Update & Go to Client Schedule](#)

- The *Update Information* screen is displayed, with choice to update the client's *Demographic* information from the HC

Option #1: Update Demographics

Update Information

Please review the data returned from the scan of the Health Card.

If you wish to update the Client's demographics based on the Health Card information, using the checkboxes below, choose which fields should be updated. If you do not wish to update any data, you can choose to go directly to the Client's Schedule.

	Existing Values	Returned Values	Update?
Health Card Number:	--	--	<input type="checkbox"/>
Version Code:	--	XD	<input type="checkbox"/>
Health Card Expiry Date:	27-Sep-2023	01/25	<input type="checkbox"/>
First Name:	Ben2	STEPHEN	<input checked="" type="checkbox"/>
Last Name:	Test	MITCHELL	<input type="checkbox"/>
Middle Name:	--	KEALEY	<input type="checkbox"/>
Gender:	--	--	<input type="checkbox"/>
Date of Birth:	16-May-1979	31-Jan-1920	<input type="checkbox"/>
Issuing Province:	Nova Scotia	Ontario	<input type="checkbox"/>

[Return to Results Screen](#) [Update & Go to Demographics](#) [Don't Update & Go to Client Schedule](#)

- Select the items to be updated with the HC values
- Click the UPDATE & GO TO DEMOGRAPHICS button
- The worker is taken to the client's *Demographics* screen

Option #2: Do Not Update Demographics

Update Information

Please review the data returned from the scan of the Health Card.

If you wish to update the Client's demographics based on the Health Card information, using the checkboxes below, choose which fields should be updated. If you do not wish to update any data, you can choose to go directly to the Client's Schedule.

	Existing Values	Returned Values	Update?
Health Card Number:	--	--	<input type="checkbox"/>
Version Code:	--	XD	<input type="checkbox"/>
Health Card Expiry Date:	27-Sep-2023	01/25	<input type="checkbox"/>
First Name:	Ben2	STEPHEN	<input checked="" type="checkbox"/>
Last Name:	Test	MITCHELL	<input type="checkbox"/>
Middle Name:	--	KEALEY	<input type="checkbox"/>
Gender:	--	--	<input type="checkbox"/>
Date of Birth:	16-May-1979	31-Jan-1920	<input type="checkbox"/>
Issuing Province:	Nova Scotia	Ontario	<input type="checkbox"/>

[Return to Results Screen](#) [Update & Go to Demographics](#) [Don't Update & Go to Client Schedule](#)

- Click the DON'T UPDATE & GO TO CLIENT SCHEDULE button
- The worker is taken to the client's calendar

Demographics

Issuing Province	Health Card Number	Version Code
<input type="text" value="Other"/>	<input type="text" value="0"/>	<input type="text" value="XD"/>
	<input type="button" value="Scan Card"/>	
Health Card Expiry Date (MM/YY)		UCI #
<input type="text" value="07/25"/>		<input type="text"/>

- The client's health card can also be scanned from within the *Demographics* screen, by clicking on the **scan card** icon

IMPLEMENTATION

Implementation

- The customer must have the three fields below in *Demographics*

Issuing Province	Health Card Number
<input type="text" value="Other"/>	<input type="text" value="0"/>
Health Card Expiry Date (MM/YY)	
<input type="text" value="07/25"/>	

Implementation

- The BA needs to be put in a ticket to have the organization's properties set
- The customer needs to purchase a card reader

- There is no configuration to be done by either the BA or the customer
- Testing can be done on staging without a card reader

TESTING

HC Scan – Testing (on Staging)

1. Enter the fictitious information to test no client match
2. Create any client with the HCN of 1234567890. Enter the factitious information to test a client match
3. Create any client with the name of Stephen Mitchell. Enter the factitious information to test a client match.
4. Create any client with the date of birth of January 31st, 1920. Enter the factitious information to test a client match.
5. Testing should also be done on staging by swiping an actual health card