Find and maintain roster affiliation

Roster administrators

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HOW TO

View Program

1. Click **Program** and then **View** from the menu.
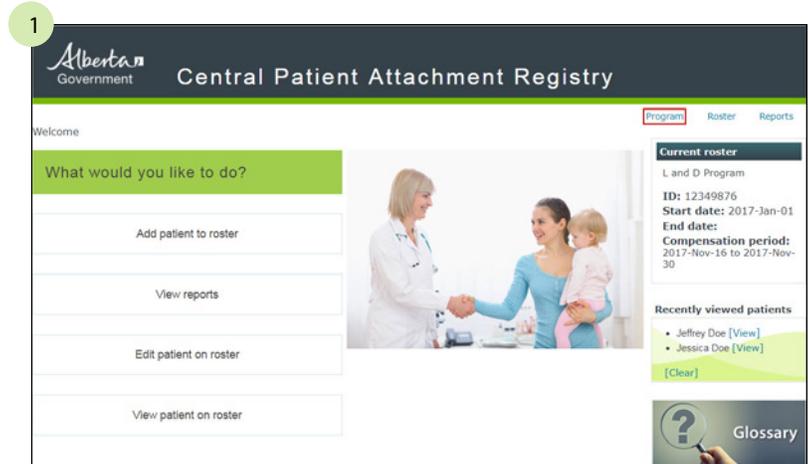
The *View Program – Program summary* page displays.
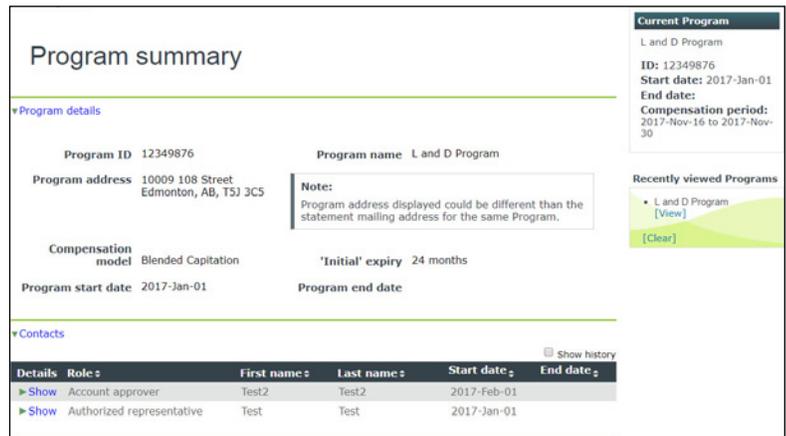
NOTE: the *recently viewed* list shows the last Program viewed or edited. Click **View** to navigate to the *view Program summary* page or click **Clear** to remove the list. This list is automatically cleared when you log out of the application.

Edit Program

1. Click **Program** and then **Edit** from the menu.

The *edit Program – Program summary* page displays.
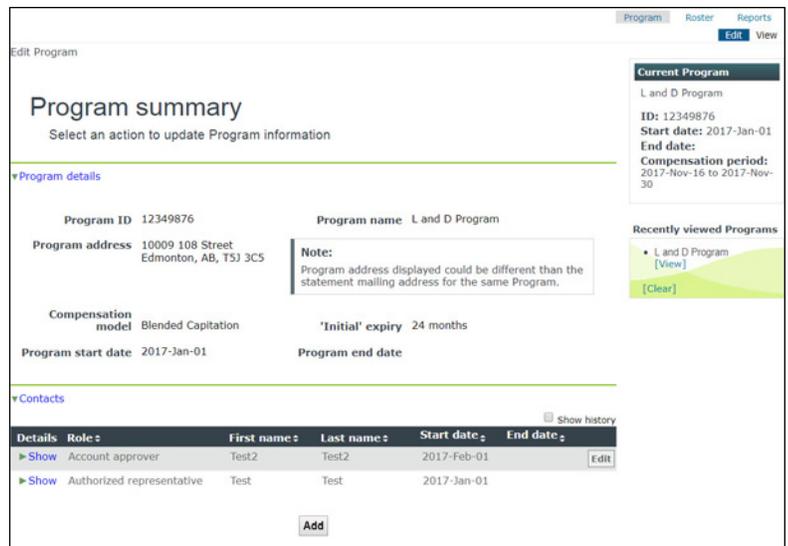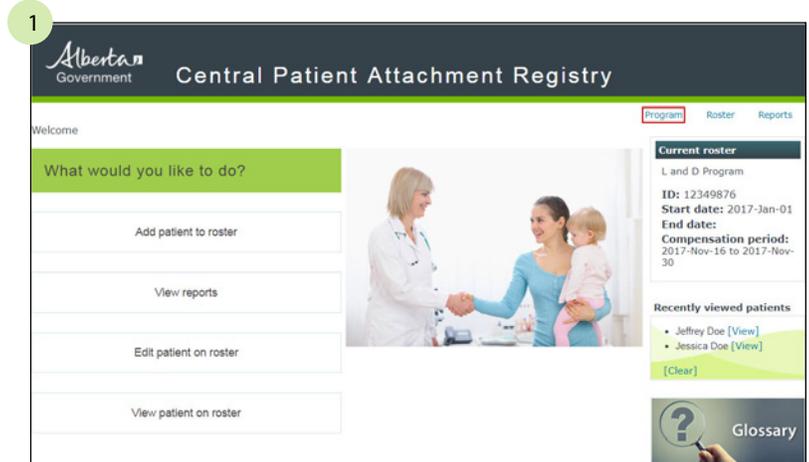
EDIT CONTACTS

1. Click **Edit** in the *contacts* block to edit a contact.

2. Edit the applicable information and click **Save**.

INVALIDATE CONTACTS

1. Click **Edit** in the *contacts* block to edit a contact.

2. Click the **Invalidate contact** link.

ADD CONTACTS

1. Click **Add** in the *contacts* block to edit a contact.

2. Enter the new contact information.
3. Click **Save**.

Find and view a patient on a roster

Find and view an existing affiliation on a roster. Existing affiliations include those created through the *add affiliation* page and those supplied through a roster file received by CPAR.

1. Click **View patient on roster**, or select **Roster** and then **View** from the menu.
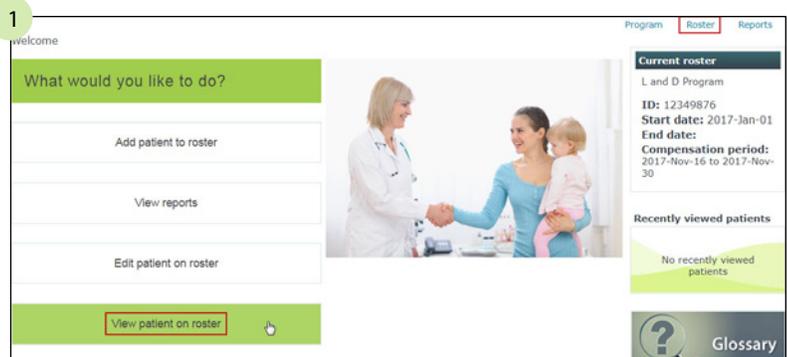
2. Enter the patient ID or name and click **Search**.

> **NOTE:** if additional search criteria is needed, click the **Search by additional criteria** link.

When searching by

• patient ID—only one result displays.

> **NOTE:** if more than one result displays, click **Show** to view additional patient details to help determine the applicable patient.

• anything other than a patient ID—multiple results may display.

> **NOTE:** status options are: initial, signed or declined.

3. Click **View** for the applicable patient to see more detail on the current affiliation.
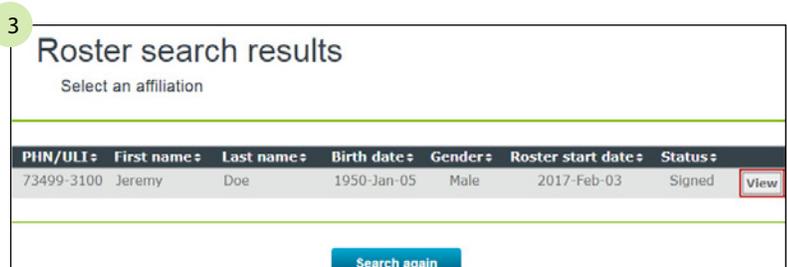
Back returns to the *view affiliation - roster search results* page.

View another patient returns to the *view affiliation - roster search* page.

Edit allows you to edit the effective date or end the affiliation.

View affiliation
View details of the current affiliation

▼Patient

Name	Jeremy Doe	PHN	73499-3100
Birth date	1950-Jan-05	Gender	Male
AHCIP coverage effective date	2015-Dec-01	AHCIP coverage end date	

▼Affiliation history

Program	L and D Program	Program ID	12349876
Roster start date	2017-Feb-03		

☐ Show invalidated

Status	Effective date	End date	End reason
No prior affiliations			

▼Current affiliation

Status	Signed
Effective date	2017-Feb-03

[Back] [View another patient] [Edit]

▼Current affiliation

Status	Signed
* Effective date	2017-02-03 📅
	(YYYY-MM-DD)

[End affiliation]

Notice an error in the current affiliation? You can invalidate it. Invalidate current affiliation

[Cancel] [Reset] [Save]

Add patient to a roster

1. Click **Add patient to roster**, or select **Roster** and then **Add** from the main menu.

   The *roster search* page displays.
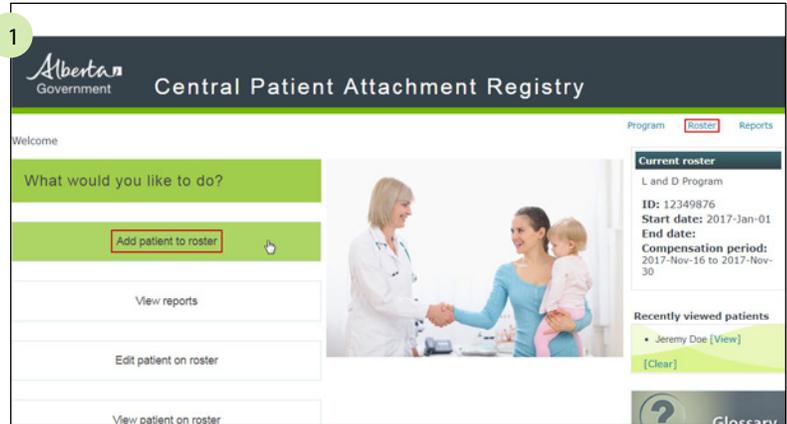
2. Enter the search criteria and click **Search**.

   The search results display.

   When searching by

   • patient ID—only one result displays.

   • anything other than a patient ID—multiple results may display.

   Each result has an associated match score. The results are scored based on how closely they match the criteria entered, with a higher score indicating a better match. Each search field contributes to this score. The more information provided in the search criteria, the better the accuracy of the results.

   NOTE: if needed, click **Show** to view additional patient details to help determine the applicable patient.
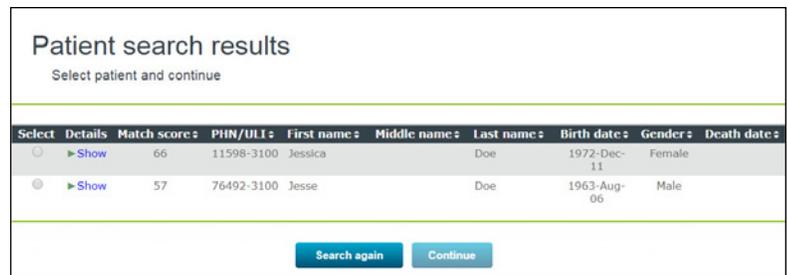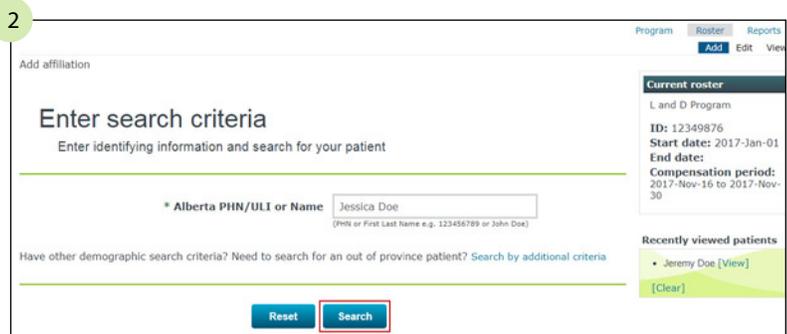
3. Select the radio button for the applicable patient, if more than one search result displays, and click **Continue**.
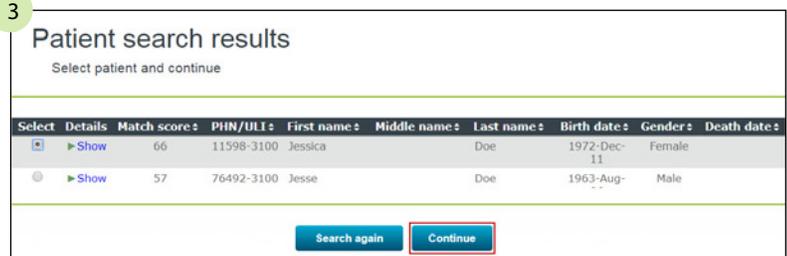
4. Complete the following:

    a. Check the **Patient has signed agreement** box if they have signed the agreement.

    b. Enter the **Signed effective date** if they have signed.

5. Click **Save**.

The following confirmation displays:

ADD A PATIENT TO A ROSTER – PRIMARY AND SECONDARY ID

Some patients have a primary and secondary ID which are linked.

1. Click **Add patient to roster** or click **Roster** and then **Add** from the menu.

2. Enter the search criteria and click **Search** (this is the primary ID).

3. If a search is completed using the primary ID the PHN/ULI field displays this ID.

4. Click **Show**.

5. If this is the primary ID, the *Alberta Health unique lifetime identifier (assc)* displays an additional number.

If you need to search using a scondary ID, click **Search again**.

Search under the secondary ID

6. Enter the ID listed in the *Alberta Health unique lifetime identifier (assc)*.

7. The search results display a secondary ID field which indicates the number searched is the secondary ID. The PHN/ULI indicated is the primary ID.

Add a patient to a roster with an existing affiliation (re-affiliate)

1. Click **Roster** and then **Add** from the main menu.

2. Enter the search criteria and click **Search**.

3. If more than one search result displays, select the radio button for the applicable patient and click **Continue**.

4. Click **Re-affiliate**.

5. Select the **Patient has signed agreement** checkbox and the **Signed effective date**.

6. Click **Save**.

7. The *add a new affiliation* page displays with either

   • confirmation of the affiliation, or

   • a warning indicating there is a waiting period of at least 12 months.

   If the patient was previously affiliated to this roster and ended for the following reason:

   • patient request, Program request, affiliated elsewhere or initial status expired—the patient cannot be re-affiliated until the waiting period has lapsed.

   • patient is not eligible—the patient can be re-affiliated as there is not a waiting period.

EDIT AFFILIATION – EFFECTIVE DATE

1. Click **Edit patient on roster,** or select **Roster** and then **Edit** from the menu.

   The roster search page displays.

2. Enter the patient ID or name and click **Search**.

   > **NOTE:** if additional search criteria is needed, click the **Enter additional criteria** link.

3. Click **Edit** for the applicable patient.
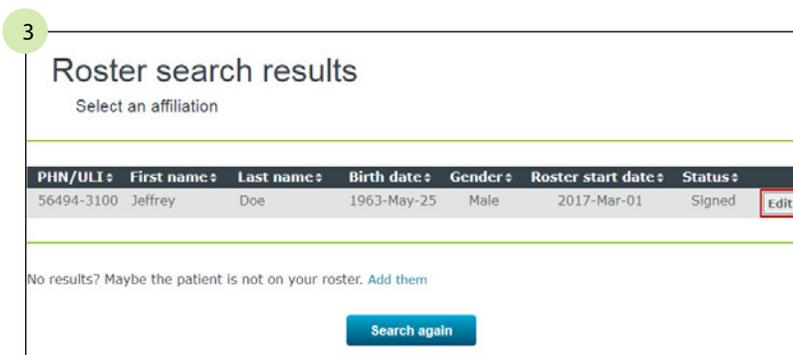
   > **NOTE:** if the patient does not display, and you are unable to find them with various search criteria methods, click **Add them**. See *add affiliation instructions*.
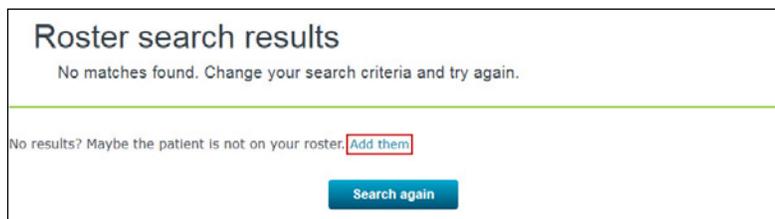
4. Enter a new effective date.

> 🔲 **NOTE:** when changing the effective date, it must be within the current compensation period and cannot be future dated. The compensation period is displayed in the *current roster* box.

5. Click **Save**.

EDIT AFFILIATION– END THE AFFILIATION

1. Click **Edit patient on roster**, or select **Roster** and then **Edit** from the menu.

2. Enter the patient ID or name and click **Search**.

> 🔲 **NOTE:** if additional search criteria is needed, click the **Search by additional criteria** link.

3. Click **Edit** for the applicable patient.

4. Click **End affiliation**.

5. Enter the

   a. **end date** (must be within the current compensation period, must be greater than the effective date and cannot be future dated), and

   b. **end reason** (deceased, long-term care transfer or patient request).

6. Click **Save**.

EDIT AFFILIATION – INVALIDATE CURRENT AFFILIATION

1. Click the **Invalidate current affiliation** link.

2. Verify the information is correct and click **Proceed with invalidation**.

View reports

1. Click **View reports** or **Reports** from the main menu.

   The *view roster report* page displays with the available report types for each pre-generated reports and on-demand reports.
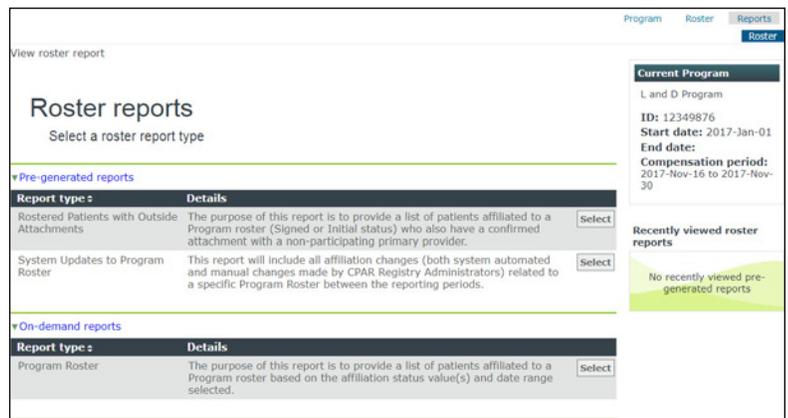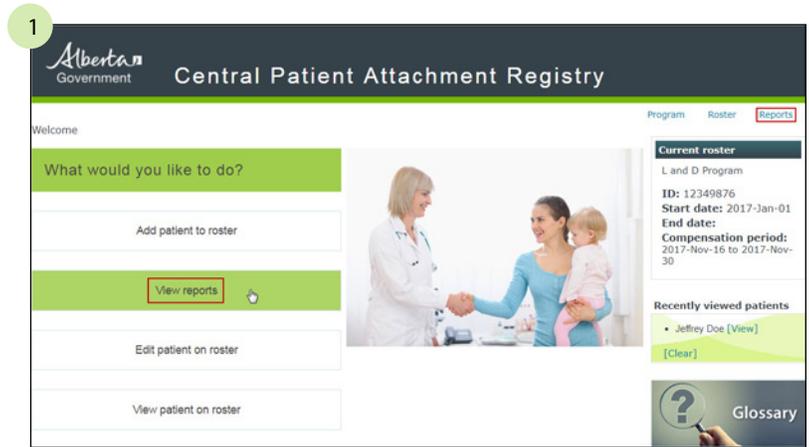
2. Click the **Select** button for the applicable report.
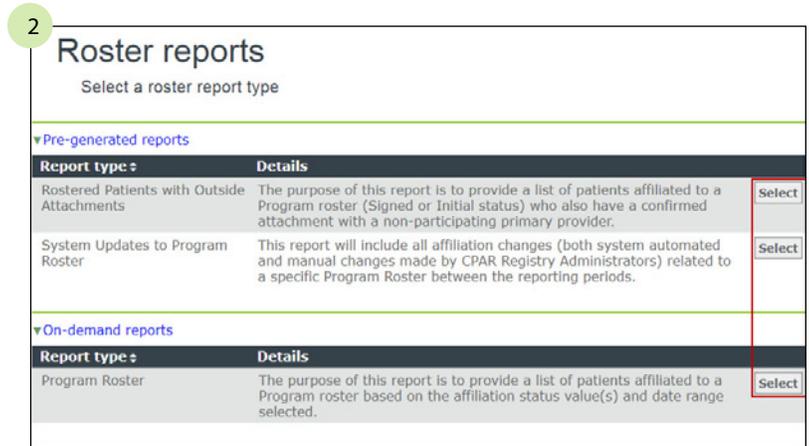
PRE-GENERATED REPORTS

ROSTERED PATIENTS WITH OUTSIDE ATTACHMENTS

1. Choose a version of the report to download, if there is more than one.

2. Click **Open**.

Depending on your browser, you can choose to download, save or open the report.

The report displays.

Click the **X** in the top right corner to close the spreadsheet.

Click the **Back** button to return to the *View roster report – Roster reports* page.

SYSTEM UPDATES TO PROGRAM ROSTER

1. Choose a version of the report to download, if there is more than one.

2. Click **Open**.

Depending on your browser, you can choose to download, save or open the report.

The report displays.

Click the **X** in the top right corner to close the spreadsheet.

Click the **Back** button to return to the *View roster report – Roster reports* page.

ON-DEMAND REPORTS

PROGRAM ROSTER

1. Click **Select** for the System Updates to Program Roster report.

2. Enter the search criteria and click **Run report**.

> **NOTE:** the * indicates required fields.

Click **Back** to return to the *view roster report – roster reports* page.

Depending on your browser, you can choose to download, save or open your report.

The report displays.

Click the **X** in the top right corner to close the spreadsheet.

TROUBLE-SHOOTING TIPS

GENERIC FIELD LEVEL MESSAGES

These messages may be received throughout the application, update according to the hint below.

Required

2017-13-13
(YYYY-MM-DD)
Invalid format

1165T2208
Value must be numeric.

1234569   Ext
(XXX-XXX-XXXX)
Invalid phone number.

emailaddress.com
Invalid email address. Email address format must be a@b.cc.

123456
Invalid postal code. Postal code format must be A9A9A9.

GENERIC ERROR AND WARNING MESSAGES

- Effective date cannot be future dated.

TIP   Enter a day in the past or today's date.

- End date must be later than start date.

TIP   Check the start date and ensure the end date entered is later.

- Area Code is not valid for Country Code.

TIP   Verify the area code has been entered correctly.

- Maximum number of results displayed. Other matching patients may exist, but are NOT shown. Consider adding search criteria if your patient does not appear in this list.

TIP   The maximum number of search results is 20. Try to search again and add additional search criteria.

ADD OR EDIT PROGRAM

> • Authorized Representative contact is mandatory. No gaps are allowed.

➡ **TIP** There must be at least one contact with the role of authorized representative for the entire effective period of the Program.

> • Duplicate program contact found.

➡ **TIP** A contact with the same name and role already exists.

> • Contact effective period must be within program effective period.

➡ **TIP** The contact has a start date prior to the start date of the Program. Correct the contact start date.

ADD OR EDIT AFFILIATIONS

> • There is a waiting period of at least 12 months before this patient can be re-affiliated.

➡ **TIP** The patient was previously affiliated to the roster and the affiliation was terminated. The patient cannot be re-affiliated during the 12-month waiting period.

> • Add affiliation is not allowed for patient John Doe 12345-6789. The selected patient was deceased prior to the start of the current compensation period.

➡ **TIP** The patient cannot be affiliated to the roster as the patient is deceased.

> • No AHCIP coverage dates were found for this patient.

➡ **TIP** The patient cannot be affiliated to the roster as they do not have current AHCIP coverage.

> • Add affiliation is not allowed for patient Jane Doe 12345-6789. The selected patient's Alberta Health Care Insurance Plan eligibility does not fall within the Program's effective period.

➡ **TIP** The patient cannot be affiliated to the roster as they do not have AHCIP coverage during the effective period of the Program.

> • The selected patient does not have any AHCIP coverage on the status effective date.

➡ **TIP** The patient cannot be affiliated to the roster as of the entered status effective date as they do not have AHCIP coverage on that date. Review the patient's AHCIP coverage information and correct the effective date if required.

> • Add affiliation is not allowed for patient John Doe 12345-6789. The selected patient's Alberta Health Care Insurance Plan eligibility is effective in the future.

➡ **TIP** The patient cannot be affiliated to the roster at this time as their AHCIP coverage is not yet effective.

> • Status effective date must be on or after the current compensation period's start date.

➡ **TIP** No roster changes are allowed prior to the current compensation period.

> • End date cannot be prior to the current compensation period.

➡ **TIP** No roster changes are allowed prior to the current compensation period.

> • Effective date must be within the current compensation period.

➡ **TIP** No roster changes are allowed prior to the current compensation period.

> • End date must be greater than effective date.

➡ **TIP** No roster changes are allowed prior to the current compensation period.

> • Effective date cannot be future dated.

➡ **TIP** Roster affiliations cannot be future dated.