Healthcode Trace &Membership Look-Up System

USER GUIDE

Contents Page

How to use the HTMLUS system

1.1 Introduction.

The Healthcode Tracing and Membership Look-Up System (HTMLUS) has been designed to offer registered Providers access to either retrieve membership data held within Insurer systems', or to trace a patients Insurer, via a standard web-based Interface.

Users can request access to the facility through the User Login Request, provided on the VEDA login screen, and share the same security characteristics as deployed for other Healthcode secure services. HTMLUS provides a user friendly system and present registered providers with a business advantage for obtaining patient information on a near real-time basis.

Only AXA-PPP are participating in this initial release. However over private medical insurers have committed to participate in the near future.

1.2 Accessing the Internet

Switch on the PC and ensure your method of connecting to the Internet is connected. Log into windows as you normally would, when your PC boots up a screen appears with icons. This is called the desktop

Before connecting to your Internet browser please ensure that your browser setting are correct for accessing the Healthcode website (Appendix 1)

Point your cursor on one of the following Internet icons and double click with the left hand button on the mouse.
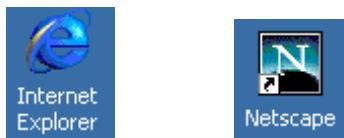
This will open up your Web page.

With the mouse, highlight the information displayed in the address field. Type in

www.healthcode.co.uk

Then hit the return/enter key on your keyboard

**2,0 Logging onto the Secure Site**

This will be the first page displayed when you log into www.healthcode.co.uk
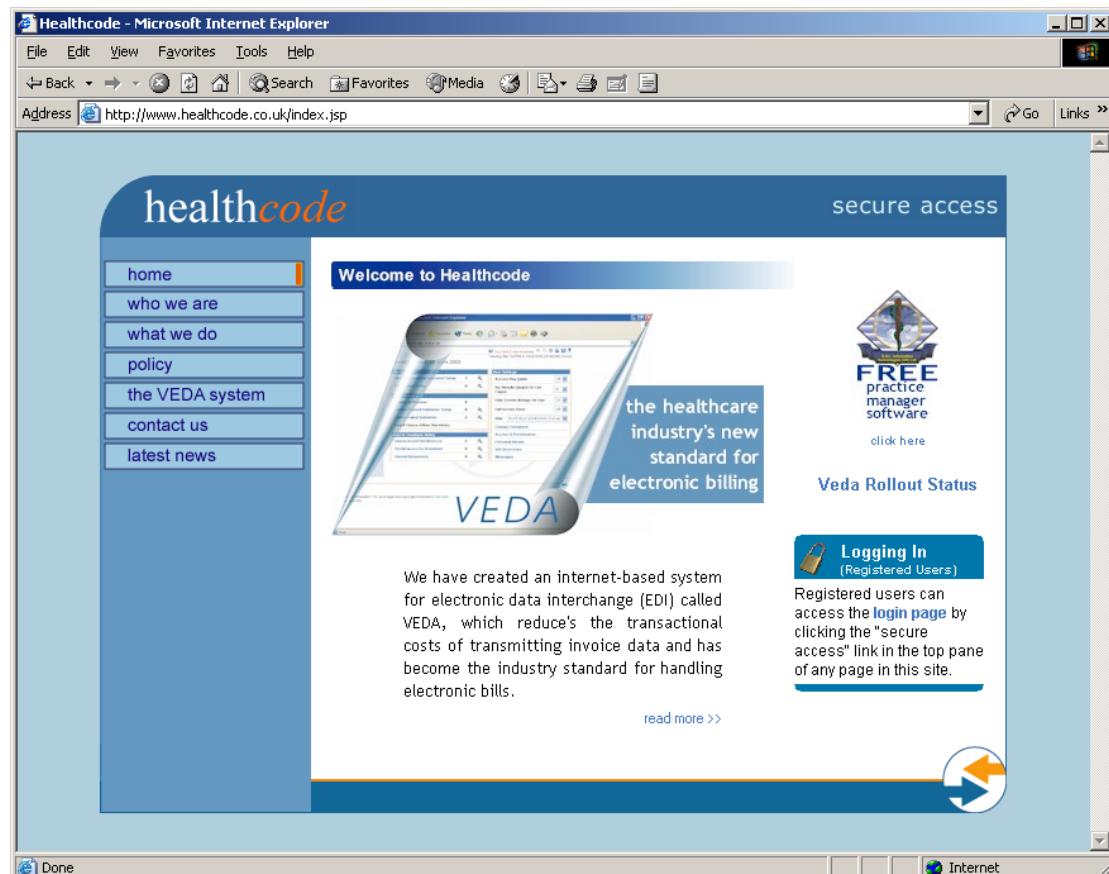
Click on the Secure Access button. The following screen will appear.
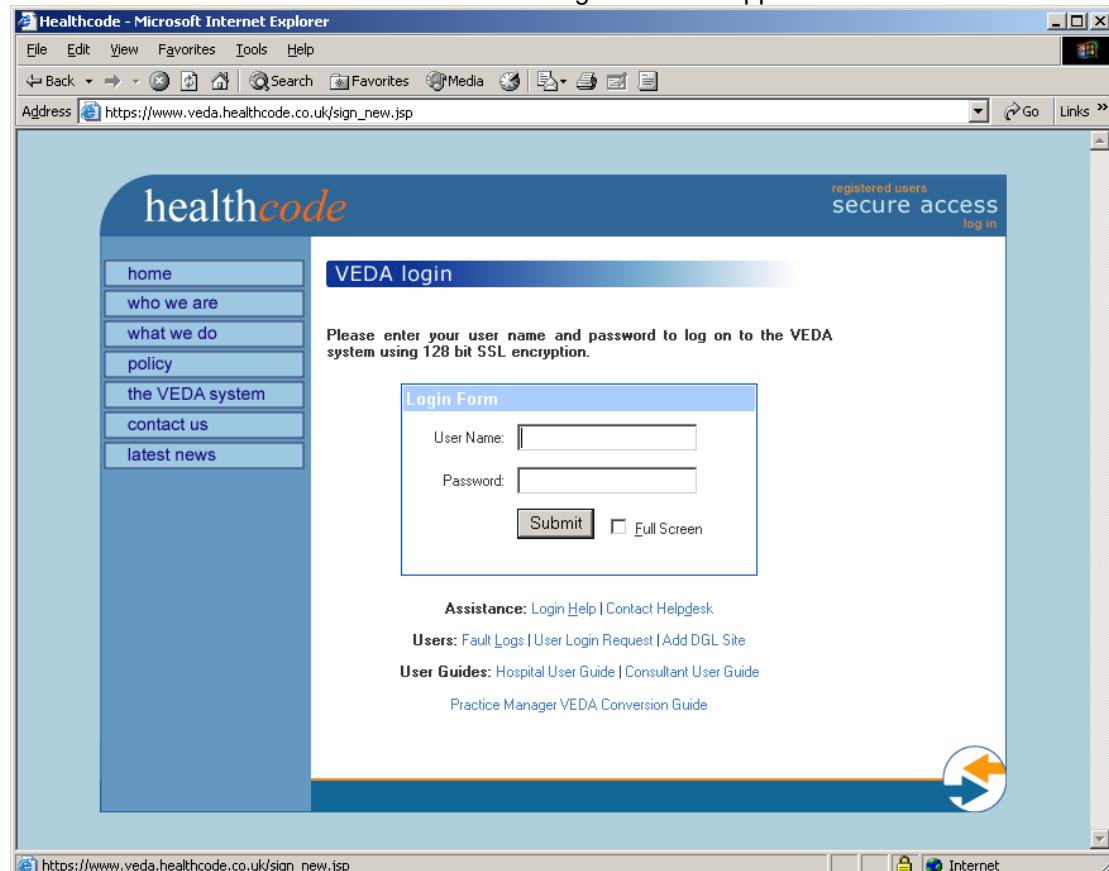
Please enter your User Name and Password, both of these are case sensitive and are very different from what you are used to, so care should be taken. Once you have input this information click the submit button.

If this is the first time you have logged the following screen will appear asking you to change your password.

This will appear every three months, as this is the life span of your password. Complete the required fields and click the **Submit** button. Once you have changed your password you will have successfully logged onto the system.

3.0 The HTMLUS Status Page

The screen you first see when you logon will be dependant on whether you are a current Veda user of not.

3.1   Veda Users

Veda Users will see their Provider Status Page below with the option of the Membership Look-Up & Trace on the left hand menu bar

To access the HTMLUS section of Veda click on LookUp and Trace option on the left hand menu bar. You will then see the HTMLUS Status Screen

Non-Veda Users

Non-veda users will log directly into the HTMLUS Status Screen

Look-up Only Users

If your site only subscribes to the Look-up Process you will see the following screen

<u>Look-up and Trace Users</u>

If your site subscribes to the Look-up and Trace process you will see this status screen
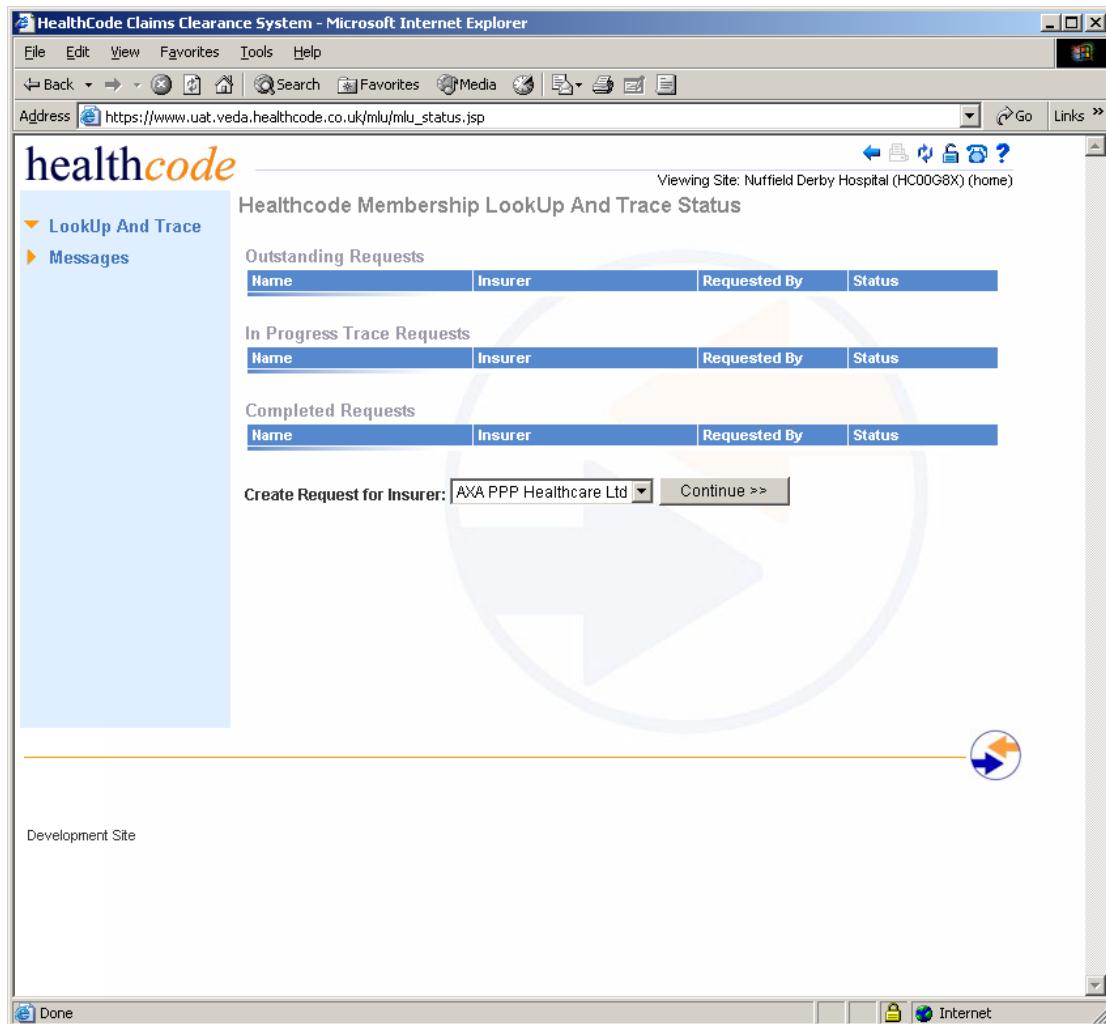
<u>Status Screen Sections</u>

The status screen will give you a summary of requests submitted for the **current working day.** The requests are cleared down at the end of each day.

These appear under 3 headings

Outstanding Requests

This list displays all Membership Look-Up requests that have yet to be responded to by the Insurer(s).

This list will also display any requests submitted by other users at your site.

In Progress Trace Requests

This list displays all responses for all Trace Requests. It indicates which have received a response from at least one Insurer, and which are still awaiting a response from at least one Insurer

This list will also display any trace requests submitted by other users at your site for the current working day.

Completed Requests Lists

This list displays all Membership Look-Up or Membership Trace requests that have been completed.

From the status screen you are able to submit look-up and if your access rights allow trace requests.

4.0 Creating a look-up request

This function allows either a Membership Look-Up or a Membership Trace to be performed, depending upon the option selected. The drop down selection list contains the following options:

AXA PPP Healthcare Ltd
All (Trace)

NB. The 'All (Trace)' option will not be available if user only has look-up access.

Select the required Insurer (only PPP at the current time) by clicking on the required Insurer name within the drop down selection list. Then press 'Continue' to action the request.

You will then be presented with the data entry screen for the lookup request
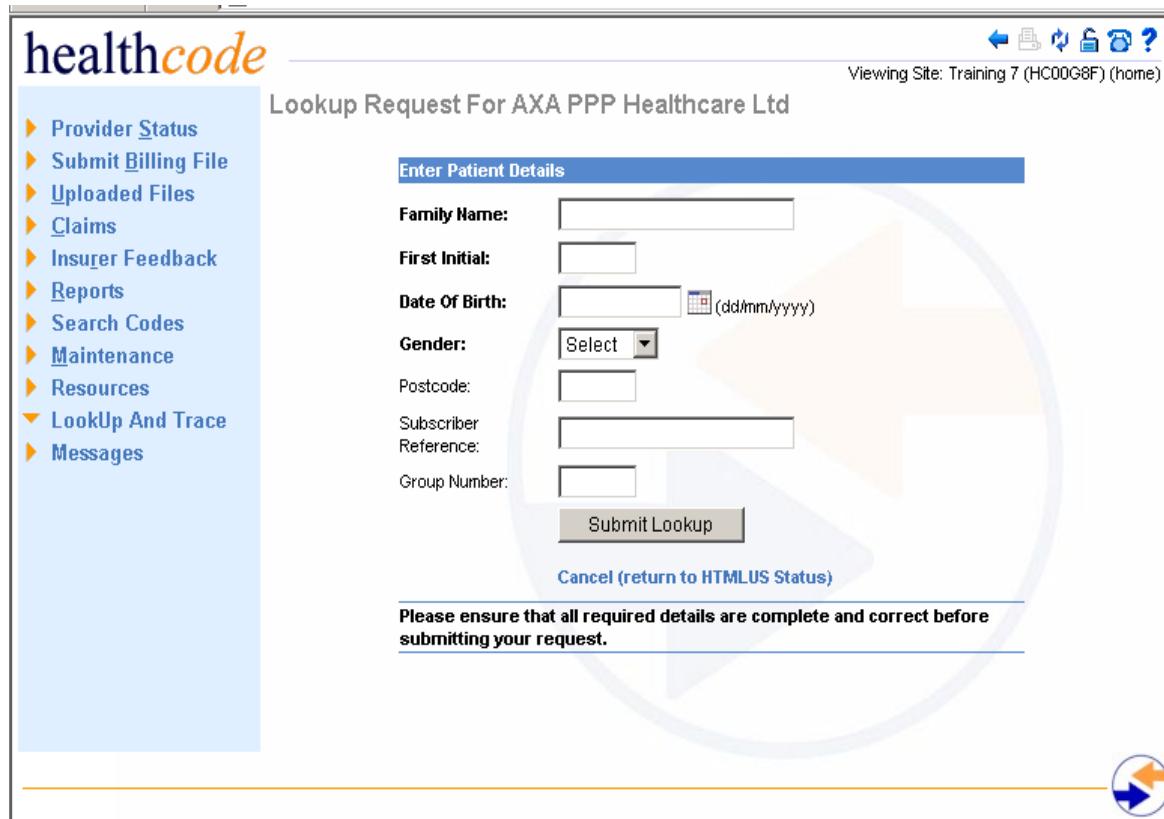
Enter details of the patient you wish to perform the look-up on. The fields in bold are mandatory and have to be entered in order to perform the look-up.

If you have any of the non mandatory data this will maximise the chance of finding an exact match on the Insurers' system.

To cancel the request, select the Cancel (return to HTMLUS Status)

When all data is entered you are ready to perform the look-up request.

Click on Submit Look-up button. You will then be returned to the HTMLUS Status Screen. Until a response is received from the Insurer you will see the request in the Outstanding Look-up section of the status screen with a status of Awaiting Response.

5.0 Status of submitted requests

Once submitted your look-up / trace requests can show a variety of status messages according to matches found with the Insurer.

To view the most current status' of your request you will need to select your refresh icon on the website ♻ to reload the page.

Please note that a no match response does not necessarily mean that the patient is not a PPP customer - it could be that the customer is not yet known to PPP.

Response	
Awaiting Response	Request has been sent to Insurer. Data has yet to be returned.
1 match	You are able to view / copy or print the information
Multiple Matches	This indicates that the criteria entered for the search has identified more than one person. If possible enter a new search extending the criteria to include postcode, membership number or group number. Else contact their hospital liaison team using the telephone number indicated in the response.
No Match	Contact Insurer to confirm or enter further search criteria to identify patient.
Insurer system error	Insurer system down resubmit search

6.0 Viewing of matched data

If an exact match is found using the search criteria entered you will be able to click on the **1 match** link next to the patient name on the Status Screen.

This data can then be printed.

Clicking on the back button returns you back to the status screen.

7.0 Help Screen Icons & Logging off the system

Help Screen Icons

On all pages of the VEDA system there are 6 important Icons at the top right hand side of each page. The ← and 🖨 are greyed out until you can use them.

- ← To move back to the previous page
- 🖨 To print the page
- ↻ This icon will reload the current page with updated information (refresh); you can also use the F5 key
- 🔓 This icon must be used to log out of the VEDA system at any time.
- ☎ This icon will automatically propagate an email to the healthcode helpdesk
- ? This icon will offer any help that is available to you and will also give you a brief explanation

Logging off the system and using the Internet Explorer icons

The following must be noted whilst using the Healthcode HTMLUS and Veda System.
Performing any of the actions below will cause you to lock your user account & be logged out of the Healthcode website. I

The refresh icon on your Internet Explorer should not be used to refresh / reload the page.

The close X icon, or the File, Exit command from your menu options should also not be used to close the browser window.

Do not type in another www address or select a website from your favourites without using the 🔓 button to logoff first.

APPENDIX 1

<u>**CONFIGURING THE INTERNET EXPLORER BROWSER**</u>

<u>**Configuration of Browser.**</u>

Once you have accessed the Internet you need to follow the following steps to ensure the most recent pages are displayed.

(1)   Click on Tools and move down to Internet Options.

(2)   The Properties pages will appear as in Fig.1 below.

Fig.1   The Internet Explorer Browser Properties Pages.
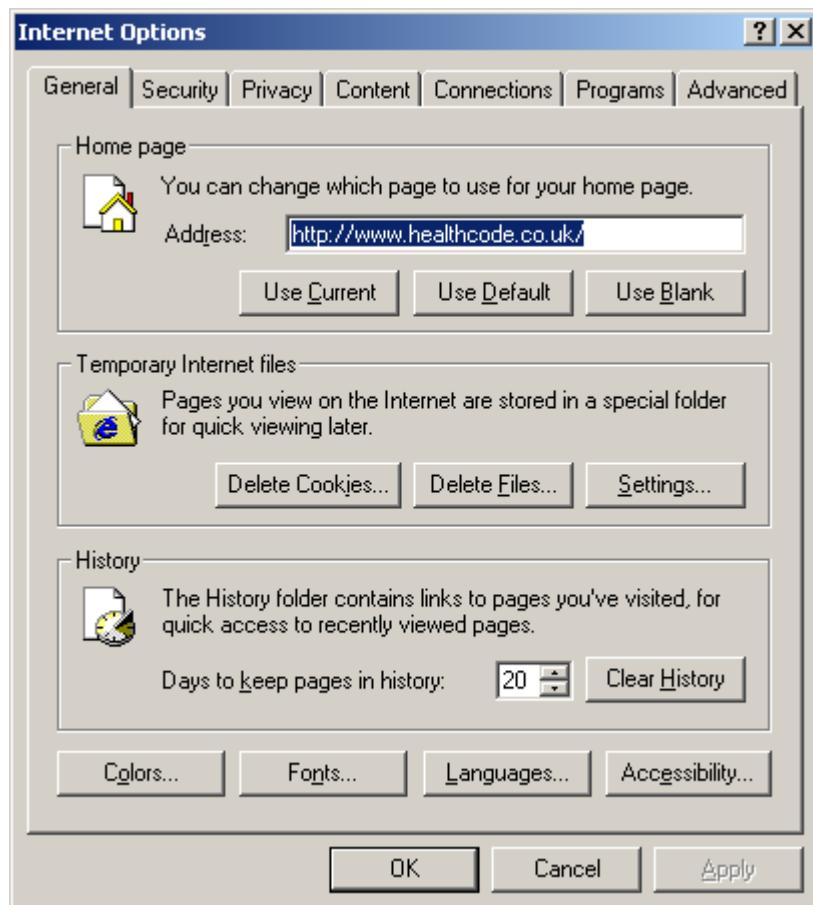
(3)   On the 'General' tab click on the 'Settings' button. The page shown in Fig.2 will appear.
Fig.2   The Settings Page in Internet Explorer Browser Properties with radio buttons offering four choices to check for versions of stored pages.
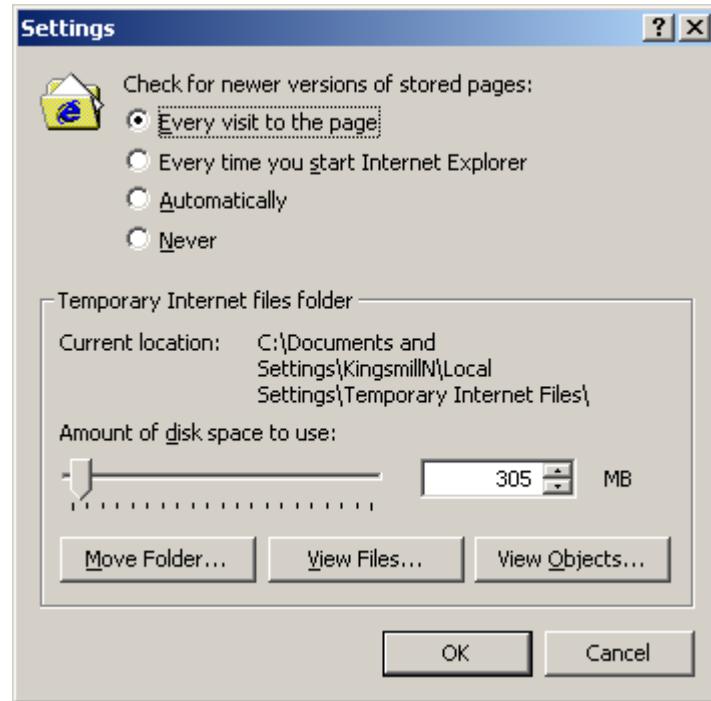
(4)   At the top of the 'Settings' page are 4 radio buttons. It is essential that the top option 'Every visit to the page' be selected. Press OK.

(5)   Press OK to close the browser properties pages.

Autocomplete for Login ID's and Passwords

In order to ensure that other users are not able to logon to the Secure Access page of the Healthcode Website using your login ID & password please do the following.

(1)   Select Tools, Internet Options from you Internet Explorer Menu Bar

(2)   Select the Content tab from the Internet Options
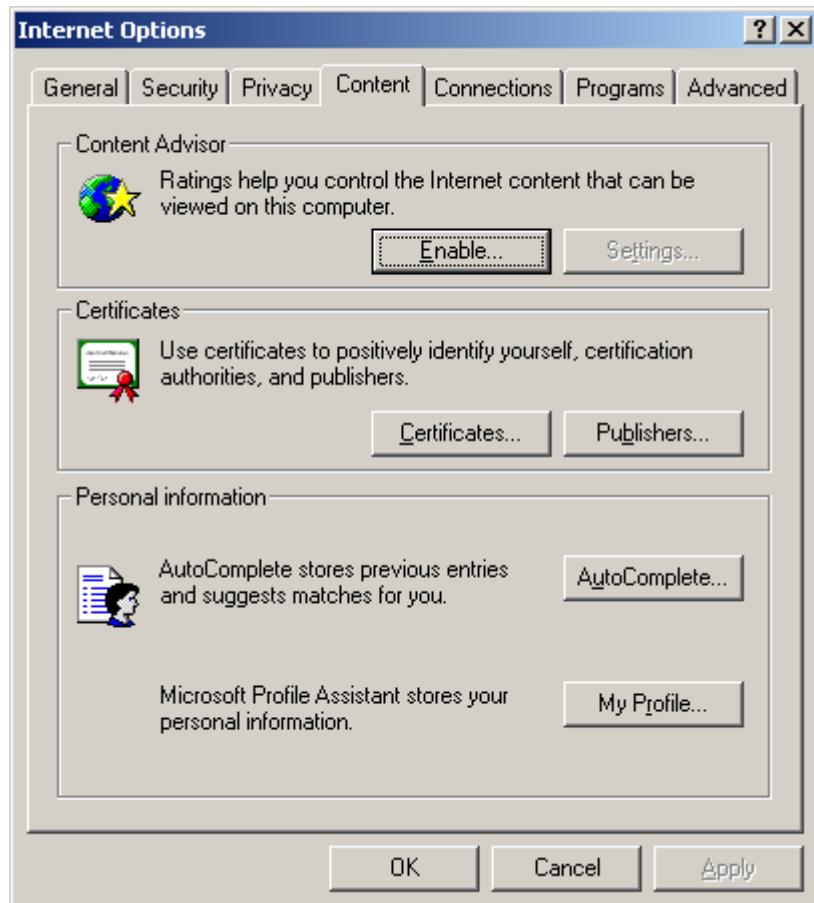
(3)   Select the AutoComplete option from the content tab and ensure the AutoComplete option for Usernames and passwords is unselected and click the clear passwords option within the tab. Click on OK to exit this tab and Ok again to exit from the Internet Options.