

Alberta  
**Netcare**



ELECTRONIC HEALTH RECORD

## Person Directory (PD) – User Guide

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Alberta 

 Alberta Health  
Services

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**Note:** All screen shots in this guide are from a test site and do not contain real user IDs, contact information or names.

This document is available electronically in the Learning Centre.  
It has built-in tools that will assist in its navigation and use.

## PD Basics

### **What is PD?**

PD stands for **Person Directory**. PD is an essential building block of the Electronic Health Record (EHR), and is a web-enabled application that delivers person-identifiable demographic and eligibility information to authorized healthcare providers. PD is accessed through Alberta Netcare Portal (ANP)



**NOTE:** PD is the source of truth for Alberta Health Care Insurance Plan coverage (eligibility).

## PD Access

### **PD and Authorized Health Care Providers**

Access to the EHR and PD is based on a user role and profession. Access permissions are set up to ensure you have enough information available to you to do your job, and that information is accessed only on a need-to-know basis.

An authorized user is a **Custodian** or **Affiliate** who has been granted security access. Generally, this is the person who, in the normal course of their duties, has a business need to:

- View PD Information
- View Newborn Information
- Add / Update PD Information
- Add / Update Newborn Information



**NOTE:** Please be aware that all access to patient information within PD is monitored and audited.

### **Who may Access PD**

Only authorized health care providers with appropriate permission may access PD.

#### **View PD**

Permission Levels required are:

- Admin 1, Admin 2, Admin 3, Admin 4, and Admin 6.
- Clinical 1, Clinical 2, Clinical 3, Clinical 4, Clinical 8, Clinical 9 and Clinical 10.
- Pharmacy 2, Pharmacy 4 and Pharmacy 5.

### **Update PD**

Permission Levels required are:

- Admin 1, and Admin 2
- Clinical 8 and Clinical 10

### **View Newborn**

Permission Levels required are:

- Admin 1 and Admin 4

### **Update Newborn**

Permission Level required is:

- Admin 1

## ***Your PD Login Credentials***

For information on synchronizing your PD and Alberta Netcare Portal (ANP) login Credentials, see the ANP Setup Guide.

For information on Changing your PD Password and synchronizing it with ANP, see the ANP Setup Guide.

## ***Launching PD***

PD is accessed by configuring the Alberta Netcare Portal Homepage.

There are two ways to set up access to PD:

1. Add a [PD Open button](#) to your Homepage. \*
2. [Automatically launch PD](#) every time you access your Homepage. \*

The way in which you set up your PD access is entirely up to you. If you are a frequent user of PD, you may want to set up the Autoload feature.



**NOTE:** \* You must set your browser to allow pop-ups from Alberta Netcare Portal.

## ***How to Set Up an Open Button***

1. Log in to Alberta Netcare Portal
2. Scroll down to the bottom the page Clinician Homepage.
3. Click the **Configure Layout** button.



4. From the drop down list, select **Person Directory**.

Person Directory

5. Add the PD open button to the homepage by selecting **New Section to the Right** or **New Section Below** by clicking the **Add (+)** button.

+ New Section to the Right  
+ New Section Below

6. Click the **Update Layout** button at the bottom of the screen.

Update Layout

7. An open button for Person Directory is now displayed on the Clinician Homepage.

Homepage

Person Directory

Open

## Viewing

### Search for a Patient File

Person Directory  
v3.1.1.002

**Person Search Criteria**

PHN/ULI: \*

or

Last Name: \*  
 Last Name Search is:    
 First Name:   
 Middle Name:   
 Alternate ID Type:    
 Alternate ID: \*

Date of Birth:  (YYYY-MM-DD)  
 Age Range:  to   
 Gender:    
 Phone Number:   
 City:   
 Vital Status:

\* One of these fields must be filled in

1. The **PHN/ULI** is the search criteria most likely to result in a "hit" or "best match". No other search criteria can be combined with the PHN/ULI. **Note:** The dash is not required.
2. If not searching by the PHN / ULI, enter search criteria into the remaining fields. At least one field marked by a \* (Red Asterisks) must be populated.
  - Enter the **Last Name** of patient to be located. The **First Name** and **Middle Name** are optional



- Select a **Last Name Search Is** type from the drop-down menu. Options are: **Exact** (default setting and will search of the identical spelling of the name), **Phonetic** (will search based on the spelling of how the name sounds), and **Starts With** (will search based on using the indicated letters as the beginning of the name)
- Combine **Alternate ID** with an **Alternate ID Type** selected from the drop-down menu. If it does not return a match, it doesn't necessarily mean that the person is not in PD. Not all Alternate IDs are entered for everyone in PD. No other search criteria can be combined with Alternate ID.
- If a complete **Date of Birth** is entered, results will only display those with an exact date match, if the year is entered, results will display those that match the other search criteria of patients born the year entered.
- Entering an **Age Range** will only pull results of records for persons within that range
- Selecting a **Gender** will refine the search to records of persons for the gender selected
- The **Phone Number** field will search against the patients phone number that is the 'current' record within PD.
- Entering a **City** will refine the search to records with the current active address being the city selected
- Entering a **Vital Status** (options are: Any –default, Alive, Deceased) to refine the search to records of persons with that status.

**Note:** In this example, the last name, gender and vital status are used to refine the search.

3. Click **Search** to execute the search against the entered information
4. Click **Clear** to remove the entered search criteria and start over
5. Click **Back** to return to the screen previous reviewed.

Person Directory						
Search Results						
	Full Name	Name Type	Age	City	Date of Birth	Gender
	<a href="#">Doe, Danielle Nicole</a>	Preferred	27 Year(s)	Edmonton	1984-Dec-27	Female
	<a href="#">Doe, Dodi</a>	Preferred	33 Year(s)	Flin Flon	1978-Dec-02	Female
	<a href="#">Doe, Jane Q</a>	Preferred	49 Year(s)	Edmonton	1963-Jun-02	Female
	<a href="#">Doe, Jessie</a>	Preferred	51 Year(s)	Edmonton	1961-Jun-19	Female
	<a href="#">Doe, Jill</a>	Preferred	2 Day(s)	Edmonton	2012-Jul-31	Female
	<a href="#">Doe, Kimberley</a>	Preferred	40 Year(s)	Edmonton	1971-Oct-13	Female
	<a href="#">Doe, Lee Lynette</a>	Preferred	32 Year(s)	Edmonton	1980-Jan-01	Female
Validated	<a href="#">Doe, Lyn</a>	Preferred	1 Month(s)	Edmonton	2012-Jul-01	Female
	<a href="#">Doe, Lynette Lee</a>	Preferred	62 Year(s)	Edmonton	1950-Apr-04	Female
	<a href="#">Doe, Marcy</a>	Preferred	60 Year(s)	Edmonton	1952-Jun-28	Female
	<a href="#">Doe, Mother</a>	Preferred	32 Year(s)	Edmonton	1980-Jan-01	Female
	<a href="#">Doe, Phyllis</a>	Preferred	66 Year(s)	Edmonton	1946-May-31	Female
	<a href="#">Doe, Sally Edith</a>	Preferred	43 Year(s)	Edmonton	1969-Feb-09	Female
	<a href="#">Doe, Sharon</a>	Preferred	48 Year(s)	Edmonton	1964-Jan-06	Female
	<a href="#">Doe, Trina</a>	Preferred	35 Year(s)	Edmonton	1977-Mar-27	Female

Search Results Fields:

- **Full Name:** displays the Last name in bold, followed by the first name and middle name (if entered / applicable)
- **Name Type:** Displays either: **Preferred**, **Alias**, **Legal**, or **Maiden**. When a search is done on a common name and multiple persons have the same full name and similar demographic information, the user will have to verify the Name Type for each record to determine if any records are duplicate entries for the same person. By displaying the Name Type with each name on the Search Results screen, a user can more easily determine if two or more records with the same name and demographic information are duplicates.
- **Age:** Displays the age of the person as of today's date
- **City:** Displays the city for the patient on their civic address, If no civic address is entered, then Delivery Instillation address city is listed.
- **Date of Birth:** Displays the Date of Birth recorded within PD
- **Gender:** Displays the Gender selected on the person's file

- To view the patient's PD record, click on the **name** link
- Click **Refine Search** to add additional search criteria to help reduce the search results
- Click **New Search** to clear all search fields and start over.



**NOTE:** If a patient can not be located in PD:

- Ensure that **at least one** of the search fields with **red asterisks** is filled in on the search **screen**, or
- Reduce the amount of search criteria. Too many requirements may not return any results as they must **all match exactly**. Always start off with broad search criteria, and



then narrow the criteria. E.g. start with full last name, first initial of the first name, and year of birth.

- Try searching for the last name using the **Last Name Search is:** drop-down menu set to either **Phonetic** (sounds like) or **Starts With**.

**Note:** Names are not case sensitive.

### PD Person Home Page (View / Update Person screen)

The screenshot displays the 'View/Update Person' screen for Lee, Doe Lynette. The page is titled 'Person Directory' and shows the following information:

- Name and Person Details:** Preferred Name: Lee, Doe Lynette; Gender: Female; Date of Birth: 1950-May-04; Added in Error: No. Includes an [edit...] link.
- Address and Phone Numbers:** Residential/Mailing: 1234 Mill Rd W, Edmonton, Alberta, Canada, T5K 2N8 (As of: 2012-Jul-03). Residential/Telephone: (780) 555-9876 (As of: 2012-Jul-05). Includes a [view all addresses and phone numbers...] link.
- Eligibility:** Not Currently Eligible. Includes a [view eligibility...] link.
- Additional Information:** Links to Alberta Personal Health Card Requests, Alternate IDs, Merge Potential Duplicates, Registration Validation, Residency, and Secondary ULIs.

At the bottom of the screen are 'Back' and 'New Search' buttons.

1. If the View/Update Person displays an **Edit** link (versus a View link) it confirms that the Access Permission Level for the PD User is set to **View and Update**.
2. If the View/Update Person displays a **View** link, it confirms that the Access Permission Level for the PD User is set to **View**. If the user requires additional access to PD, they should consult their Access Administrator.
3. The **Additional Information** links are available on the **View/Update Person** screen (regardless of access permission level):
  - i. **Alberta Personal Health Card Requests:** Displays the history of requests for a person. This link is available for all persons, whether there is a history of requests or not.

- ii. **Alternate IDs**: Displays information on the alternate types of identification numbers recorded for this person. The Alternate ID is the person's Out-of-Province health card number, Treaty number and/or federal identifier numbers (e.g. Canadian Forces and Veteran Affairs Canada).
- iii. **Merge Potential Duplicates**: Displays a screen to request a merge of two records into a primary ULI. An 'unmerge' (from the **Unmerge Primary/Secondary Persons** screen) can be requested if it is discovered that the two ULIs are for different individuals. After a merge or unmerge request is submitted, it is first validated by AHW before the change is made.
- iv. **Registration Validation**: Displays the status of required documentation associated with an application for AHCIP coverage.
- v. **Residency**: Displays arrival and departure information.
- vi. **Secondary ULIs**: Displays Secondary ULI(s) information associated with the person. If a Secondary ULI exists, click the name to navigate to the **Unmerge Primary/Secondary Persons** screen for a side-by-side comparison of Primary and Secondary ULI information.



**NOTE:** Only the **Additional Information** links that contain relevant information to the patient file will be displayed. **Alberta Personal Health Card Requests** and **Merge Potential Duplicates** display for all person records

## View demographic data

Lee, Doe Lynette		Person Directory
PHN/ULI:46872-7114		
<b>View/Update Person</b>		
<p><b>Name and Person Details:</b> [ <a href="#">edit...</a> ]</p> <p>Preferred Name: Lee, Doe Lynette            Gender: Female            Date of Birth: 1950-May-04            Added in Error: No            [ <a href="#">view all names...</a> ]</p> <hr/> <p><b>Address and Phone Numbers:</b> [ <a href="#">edit...</a> ]</p> <p>Residential/Mailing: 1234 Mill Rd W            Edmonton, Alberta            Canada            T5K 2N8  <small>As of: 2012-Jul-03</small></p> <p>Residential/Telephone: (780) 555-9876  <small>As of: 2012-Jul-05</small></p> <p>[ <a href="#">view all addresses and phone numbers...</a> ]</p>	<p><b>Eligibility:</b>            Not Currently Eligible            [ <a href="#">view eligibility...</a> ]</p> <hr/> <p><b>Additional Information:</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Alberta Personal Health Card Requests</a></li> <li>• <a href="#">Alternate IDs</a></li> <li>• <a href="#">Merge Potential Duplicates</a></li> <li>• <a href="#">Registration Validation</a></li> <li>• <a href="#">Residency</a></li> <li>• <a href="#">Secondary ULIs</a></li> </ul>	
<input type="button" value="Back"/> <input type="button" value="New Search"/>		

1. Click **view** or **edit** for additional name and person details, such as:
  - ◆ Preferred name
  - ◆ Date of Birth information
  - ◆ Date of Death information.
2. Click **view all names** to view preferred, alias, legal and maiden names
3. Click **view all addresses and phone numbers** to view any additional residential and business addresses, as well as contact information. Click **History** to view previous addresses.
4. Click **view eligibility** to view current eligibility information for the Alberta Health Care Insurance Plan (AHICIP). Eligibility history is also shown.

The **Current Eligibility Start Date** is the most recent date that the person became eligible for coverage.

5. Click any of the **Additional Information** links to view additional demographic data pertinent to this record. See [Additional Information](#)

## View Eligibility

[View Eligibility – Currently Eligible](#)

[View Eligibility – Not Currently Eligible](#)

### View Eligibility – Currently Eligible

1. **Search** for and **Select** the patient.

**Mcdaniel, Flonce Iann** Person Directory  
Validated  
PHN/ULI:10013-5009

**View/Update Person**

<p><b>Name and Person Details:</b> [ <a href="#">edit...</a> ]</p> <p>Preferred Name: Mcdaniel, Flonce Iann</p> <p>Gender: Female</p> <p>Date of Birth: 1978-Jul-25</p> <p>Added in Error: No</p> <p>[ <a href="#">view all names...</a> ]</p> <hr/> <p><b>Address and Phone Numbers:</b> [ <a href="#">edit...</a> ]</p>	<p><b>Eligibility:</b> Current Eligibility Start Date: 2009-Jan-01</p> <p>[ <a href="#">view eligibility...</a> ]</p> <hr/> <p><b>Additional Information:</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Alberta Personal Health Card Requests</a></li> <li>• <a href="#">Alternate IDs</a></li> <li>• <a href="#">Merge Potential Duplicates</a></li> <li>• <a href="#">Registration Validation</a></li> <li>• <a href="#">Residency</a></li> <li>• <a href="#">Secondary ULIs</a></li> </ul>
---	--

2. On the **View/Update Person** screen, the **Current Eligibility Date** is shown in the Eligibility field.
3. Click the **View Eligibility** link

**Mcdaniel, Flonce Iann** Person Directory  
Validated  
PHN/ULI:10013-5009

**View Eligibility**

**Eligibility Information:**  
Current Eligibility Start Date: 2009-Jan-01

**Registration Type:**  
Registration Type:  
Registration Date:

**Eligibility History:**

Coverage From Date	Coverage To Date	Coverage End Reason
2009-Jan-01		

[ [Back](#) ]

4. The **Current Eligibility Start Date** and the **Eligibility History** (if the person has multiple coverage periods) is listed on the View Eligibility screen.

## View Eligibility – Not Currently Eligible

An example of records in PD would be labeled as Not Currently Eligible include: patients who are not Alberta residents or don't meet the business rules for amount of time in Alberta to qualify as a resident, Patients who are Federally Insured, or a newborn registered in Netcare whose parents are from out of province.

1. **Search** for and **Select** the patient.

Hirsch, Maria Sosa
Person Directory

PHN/ULI:10001-9009

**View/Update Person**

**This person does not currently have Alberta Health Care Insurance Plan coverage.**

Please choose one of the following before updating this person's information:

- [This person is a resident of Alberta requesting AHCIP coverage](#)
- [This person is a visitor to Alberta](#)
- [This person is a Federally Insured person \(Canadian Forces, Federal Inmate, Federally Insured Refugees\)](#)

<p><b>Name and Person Details:</b> [ <a href="#">edit...</a> ]</p> <p>Preferred Name: Hirsch, Maria Sosa            Gender: Female            Date of Birth: 1970-Jul-19            Added in Error: No</p> <p>[ <a href="#">view all names...</a> ]</p> <hr/> <p><b>Address and Phone Numbers:</b> [ <a href="#">edit...</a> ]</p>	<p><b>Eligibility:</b> Not Currently Eligible</p> <p>[ <a href="#">view eligibility...</a> ]</p> <hr/> <p><b>Additional Information:</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Alberta Personal Health Card Requests</a></li> <li>• <a href="#">Alternate IDs</a></li> <li>• <a href="#">Merge Potential Duplicates</a></li> <li>• <a href="#">Registration Validation</a></li> <li>• <a href="#">Residency</a></li> <li>• <a href="#">Secondary ULIs</a></li> </ul>
--	---

2. On the **View/Update Person** screen, the **Not Currently Eligible** Status is shown in the Eligibility field.
3. Click the **View Eligibility** link



**NOTE:** When the period of eligibility begins on a future date, Person Directory will not display the Current Eligibility Start Date until the actual date when coverage begins. The correct current status of "Not Currently Eligible" will display. The start date of future-dated coverage can be viewed under Eligibility History.

**Doe, Ted** Person Directory  
PHN/ULI: 18293-7114

**View Eligibility**

**Eligibility Information:**  
Not Currently Eligible

**Registration Type:**  
Registration Type: Federally Insured  
Registration Date: 2012-Jul-31

**Eligibility History:**

Coverage From Date	Coverage To Date	Coverage End Reason

- The **Eligibility Information** and the **Eligibility History** (if the person has multiple coverage periods) is listed on the **View Eligibility** screen.



**NOTE:** When the period of eligibility ends on a future date, Person Directory will continue to display a Current Eligibility Start Date until the current coverage period has ended.

## Registering

### Introduction to Registering a person in PD

Person Directory  
v3.1.1.002

**Person Search Criteria**

No records were found that matched your criteria. Would you like to [add a person?](#)

PHN/ULI: \*

or

Last Name: \*      Date of Birth:  (YYYY-MM-DD)

Last Name Search is:       Age Range:  to

First Name:       Gender:

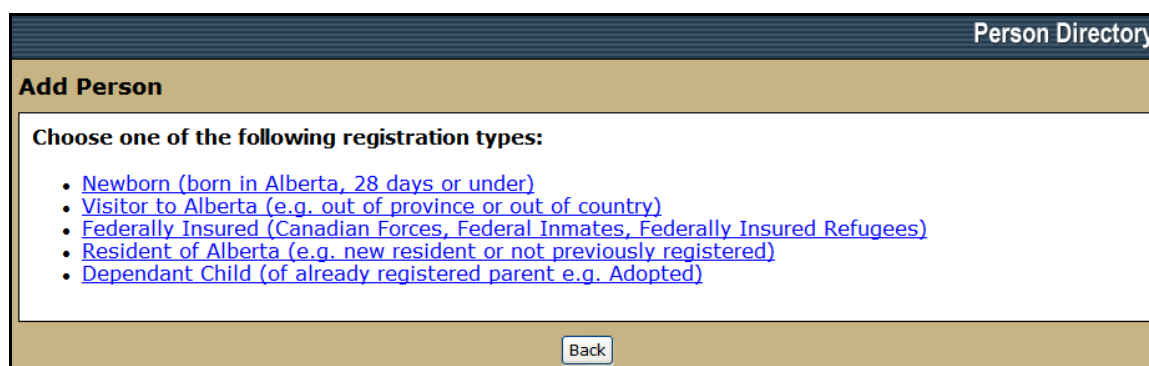
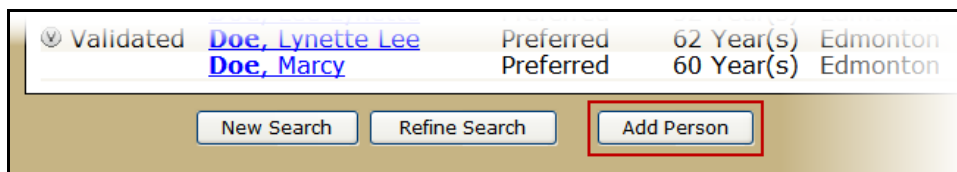
Middle Name:       Phone Number:

Alternate ID Type:       City:

Alternate ID: \*      Vital Status:

\* One of these fields must be filled in

1. Search and try to locate the person you want to add. Either:
  - ◆ Click **add** if PD does not return any search results
  - ◆ Click **Add Person** if the search results do not include the person you want to add



2. Click the appropriate registration type from the list of options:
  - ◆ **Newborn** (born in Alberta, 28 days or under)
  - ◆ **Visitor to Alberta** (e.g. out of province)
  - ◆ **Federally Insured** (Canadian Forces, etc.)
  - ◆ **Resident of Alberta** (e.g. new resident)
  - ◆ **Dependant Child** (of already registered parents)

Person Directory

**Add Alberta Resident**

Registration Date: 2012-Jul-09 \* \* required

**Preferred Name:**

Title: -- Select --

Last Name: Doe \*

First Name: Lee \*

Middle Name:

Suffix: -- Select --

**Person Details:**

Gender: -- Select -- \*

Date of Birth:   Unknown \*

(YYYY-MM-DD)

Province of Birth: -- Select -- \*

Marital Status: -- Select --

Province/State of Origin: -- Select --

Country of Origin: -- Select --

Alberta Entry Date:

(YYYY-MM-DD)  
(Leave blank if province of origin is Alberta)

Canada Entry Date:

(YYYY-MM-DD)  
(Leave blank if country of origin is Canada)

Alternate ID Type: -- Select --

Alternate ID:

**Residential Address:**  Homeless and/or No Fixed Address

Addressee:

Descriptive Note:

Civic Mailing Address:

**Extra Address Information**

--Select--  --Select--  --Select--  --Select--

Number (e.g. 11) Suffix Name (e.g. Millwoods) Type Direction

--Select--

Unit Type Unit Number (e.g. 10)

\* Alberta \*

City Province/State

Canada \*

Country

Postal/Zip Code

- OR -

Delivery Installation Address:

**Extra Address Information**

--Select--

Mode of Delivery (e.g. PO Box) Mode of Delivery Identifier (e.g. 12)

--Select--

Delivery Installation Type (e.g. STN) Qualifier (e.g. 'A') Delivery Installation Area

\* Alberta \*

City Province/State

Canada \*

Country

Postal/Zip Code

---

**Residential Phone Number:**

Usage: Residential

Type: Telephone  Unlisted Phone Number

Phone Number:

area phone ext.

-OR-

International Phone:

entry route phone

Phone Number Start Date:

(YYYY-MM-DD)

3. Complete as many of the fields as possible
4. Click **Submit**. **NOTE:** Those highlighted with a \* are mandatory. A [Duplicate Check Results](#) screen appears if some of the information is close to another record in the PD database. Respond as necessary.



Person Directory

**Add Alberta Resident Confirmation**

The person has been added successfully.  
 Click [here](#) to add another person with shared demographic information.

ULI: 21081-7114		Residential/Mailing: 321 Mill Maze Ne Edmonton, Alberta Canada T5J 4E5 <small>As of: 2012-Jul-09</small>
Preferred Name: Doe, Miss Lee Lynette		
Gender: Female		
Date of Birth: 1980-Jan-01		
Marital Status: Single		Residential/Telephone: (780) 555-9876 <small>As of: 2012-Jul-09</small>
Province/State of Origin: Alberta		
Country of Origin: Canada		

5. A screen confirms the new record. If there are additional people who share the same demographic data to be entered at the same time, click the [here](#) hyperlink on this screen. See: [Add Additional People Who Share Demographic Data](#)

Additional information on completing the screens are continued in the following sections:

- ◆ [Newborn](#) (born in Alberta, 28 days or under)
- ◆ [Visitor to Alberta](#) (e.g. out of province)
- ◆ [Federally Insured](#) (Canadian Forces, etc.)
- ◆ [Resident of Alberta](#) (e.g. new resident)
- ◆ [Dependant Child](#) (of already registered parents)

### ***Creating a New Person and PD finds a match***

Every time a new person is registered in PD, PD automatically searches for matching patients. If there is a match on one or more criterion, the **Duplicate Check Results** screen will appear.

Person Directory

**POSSIBLE DUPLICATE STAKEHOLDER(S) FOUND.**

**Person to be Added:**

Name	Name Type	Age	Date of Birth	Gender	City
Jane, Jack	Preferred	4 Year (s)	2008-Jan-15	Male	Edmonton

---

**Potential Duplicates:** (select to view details)

<a href="#">Jones, James</a>	Preferred			Male	Edmonton
<a href="#">Jones, James</a>	Preferred			Male	Edmonton

The potential duplicate records will be listed on the lower half of the screen with their demographic details listed (if available).

- Click on the **Name** Hyperlink to see a side by side comparison of the two records (the one being created and the record selected).
- Click **Add Person** to continue with the registration
- Click **Cancel Add** to stop the registration of the person
- Click **Back** to return to the previous screen.

Person Directory	
Compare Potential Duplicate	
Person to be Added	Potential Duplicate
Preferred Name: Jane, Jones	PHN/ULI: 73115-0014 Preferred Name: Jones, James <a href="#">[view all names]</a>
Residential/Mailing: 21 Milwoods Allee E Leduc, Alberta Canada  Effective date unknown.	Residential/Mailing: Jasper Ave Edmonton, Alberta Canada T5J 2N3 As of: 2003-Feb-03 <a href="#">[view all addresses]</a>
Gender: Male Date Of Birth: 2008-Jul-15 Current Eligibility Start Date: Not Currently Eligible	Gender: Male Date Of Birth: Current Eligibility Start Date: Not Currently Eligible <a href="#">[view eligibility history]</a>
Alternate ID Type: Alternate ID:	Alternate ID Type: Alternate ID: <a href="#">[view all alternate ids]</a>
Province/State of Origin: Country of Origin: Alberta Entry Date: Canada Entry Date:	Province/State of Origin: Country of Origin: Alberta Entry Date: Canada Entry Date:
<input type="button" value="Back"/> <input type="button" value="Accept"/>	

Clicking the Name Hyperlink on the **Duplicate Check Results** screen will display the **Compare Potential Duplicate** screen.

### Add Additional People Who Share Demographic Data

- From the **Add Alberta Resident Confirmation** screen (see: [step 5](#) of the Registering a person in PD), click the **here** link from the message "Click **here** to add another person with shared demographic information". The **Add Alberta Resident** screen will appear.

Person Directory	
Add Alberta Resident	
Registration Date:	<input type="text" value="2012-Aug-01"/> * <span style="color: red;">* required</span>
<b>Preferred Name:</b>	
Title:	<input type="text" value="Mrs"/>
Last Name:	<input type="text" value="Doe"/> *
First Name:	<input type="text" value="Mother"/> *
Middle Name:	<input type="text"/>
Suffix:	<input type="text" value="-- Select --"/>

2. On the **Add Alberta Resident** screen, the shared demographic data will pre-populate based on the initial entry. This includes the **Last Name, origin**, the **address** and the **telephone** numbers entered.
3. Complete the **Person Details** for the additional person being created.
4. Click **Submit**



**NOTE:** A [Duplicate Check Results](#) screen appears if some of the information is close to another record in the PD database. Respond as necessary.

5. The **Add Alberta Resident Confirmation** screen will appear, If there are additional people with shared demographic information to be entered, repeat this process from [step 1](#)

## **Newborn**

### **Registering a Newborn**

Newborns, born in Alberta that are 28 days of age or under, **must be registered** under this registration type (**Add Newborn**) to support the Alberta Newborn Metabolic Screening (NMS) program. The goal of the NMS program is that all babies born in Alberta have access to newborn metabolic screening as an integral component of their health care. The purpose of the NMS program is to minimize morbidity and mortality of Alberta infants with screened disorders.

It is critical to the success of the NMS program that newborns are linked to the correct parent PHN/ULI. Inadvertently linking to the wrong parent PHN/ULI (i.e. another family) can result in unnecessary delays when trying to reach the newborn for follow up when screening alerts are generated by the NMS Application.



**NOTE:** Linking to the wrong parent PHN/ULI can also result in a health card bearing the demographic information of the newborn being sent to the wrong family. This would potentially be a breach of person identifiable information.

**Person Directory**

**Add Person**

Choose one of the following registration types:

- [Newborn \(born in Alberta, 28 days or under\)](#)
- [Visitor to Alberta \(e.g. out of province or out of country\)](#)
- [Federally Insured \(Canadian Forces, Federal Inmates, Federally Insured Refugees\)](#)
- [Resident of Alberta \(e.g. new resident or not previously registered\)](#)
- [Dependant Child \(of already registered parent e.g. Adopted\)](#)

1. Select Newborn from the **Add Person** screen

**Person Directory**

**Add Newborn**

**Parent Information:** \* required

Parent PHN/ULI:   \*

-OR-

No Parent ULI Reason:  \*

---

**Newborn Information**

**Preferred Name:**

Last Name:  \*

First Name:   No First Name\*

Middle Name:

Suffix:

---

**Person Details:**

Gender:  \*

Date of Birth:  \*

2. Enter the Parent PHN or ULI if known and Click **Find**. Otherwise, leave the cell blank and click **Find** to launch the search screen to [search for](#) and select the parent.



**NOTE:** If the newborn does not have a parent PHN / ULI, be sure to select a reason from the **No Parent ULI Reason** drop-down menu.

**Doe, Lee Lynette** Person Directory  
 PHN/ULI: 21081-7114

**Person Confirmation**

Residential/Mailing:	321 Mill Maze Ne Edmonton, Alberta Canada T5J 4E5 <small>As of: 2012-Jul-09</small>
Gender:	Female
Date of Birth:	1980-Jan-01
Eligibility Start Date:	Not Currently Eligible

3. Confirm this is the correct parent and click **Accept**

Person Directory

**Add Newborn**

**Parent Information:**

PHN/ULI:	21081-7114	<input type="button" value="Clear Parent"/>
Preferred Name:	Doe, Miss Lee Lynette	
Residential/Mailing:	321 Mill Maze Ne Edmonton, Alberta Canada T5J 4E5 <small>As of: 2012-Jul-09</small>	
Residential/Telephone:	(780) 555-9876 <small>As of: 2012-Jul-09</small>	

---

**Newborn Information**

**Preferred Name:**

Last Name:  \*

First Name:   No First Name\*

Middle Name:

4. The parent information selected will be pulled into the Add Newborn screen. Reconfirm the identity of the parent that is returned and before proceeding with the newborn addition. If the parent selected is incorrect, click **Clear Parent** and start a new search for the parent. **NOTE:** The parent demographic information populates the residential mailing address and telephone number. If these need to be updated, see: [How do I update an address or phone number?](#)

Person Directory

**Add Newborn**

**Parent Information:**  
 PHN/ULI: 21081-7114 Clear Parent  
 Preferred Name: Doe, Miss Lee Lynette  
 Residential/Mailing: 321 Mill Maze Ne  
 Edmonton, Alberta  
 Canada  
 T5J 4E5  
As of: 2012-Jul-09  
 Residential/Telephone: (780) 555-9876  
As of: 2012-Jul-09

---

**Newborn Information**  
**Preferred Name:**  
 Last Name:  \*  
 First Name:   No First Name \*  
 Middle Name:

---

**Person Details:**  
 Gender:  \*  
 Date of Birth:  \*  
(YYYY-MMM-DD)  
 Birth Order:  \* of  \*  
 Registration Facility:  \*  
 Date of Death:   
(YYYY-MMM-DD)  
 Stillborn

5. All newborns must have a first and last name. If a first name is not known, select the **No First Name** check box. Do not type a first name of "Baby Boy". PD automatically enters a default first name for a multiple birth IF the **No First Name** check box is selected. Be sure to complete the **Birth Order** boxes
6. Enter the **Gender** and **Date of Birth** for the newborn
7. **Birth Order** is selected from a drop-down list. **NOTE:** When adding multiple newborns (e.g. twins), **Birth Order** defaults to the previous entry.
8. The **Registration Facility** field has an auto-complete functionality allowing you to either type in part or all of a facility number or name and a drop-down list of active valid facilities to chose from will appear. The addition of Newborns within PD is based on the facility where the registration is entered.
9. Click **Submit**. A confirmation screen will be displayed.



**NOTE:** Once the newborn name is registered in the system, an Alberta Personal Health Card will be generated if the newborn is eligible for coverage. If eligible, the Alberta Personal Health Card would be mailed within a week.

Person Directory

**Add Newborn Confirmation**

The person has been added successfully.

Click [here](#) to add another person with shared demographic information.

ULI: 66086-7114 Preferred Name: Doe, Lyn Gender: Female Date of Birth: 2012-Jul-01 Birth Order: 1 of 1 - Singleton Registration Facility: 042 - Grey Nuns Community Hospital	Parent Name: Doe, Lee Lynette Residential/Mailing: 321 Mill Maze Ne Edmonton, Alberta Canada T5J 4E5 <small>As of: 2012-Jul-10</small> Residential/Telephone: (780) 555-9876 <small>As of: 2012-Jul-10</small>
---	--

10. Clicking **View / Update Person** will take you to the **View / Update Person** screen for the newborn.
11. Clicking **New Search** will return you to the **PD home** page
12. Clicking **Click here to add another person with shared demographic information** will take you to the [Add Person](#) screen.

### Registering a Deceased Newborn

To minimize the possibility of an Alberta Personal Health Card being mailed to the parent of a deceased newborn, the date of death should be recorded immediately in PD *if the newborn is in the process of being added or the newborn has already been added.*

*If the newborn is in the process of being added to Person Directory:*

- a) A newborn will have to be added through the **Add Newborn** screen within PD and updated as deceased with the Date of Death (**Note:** the **Add Newborn** screen has edits in place preventing the Newborn from being added under any other registration type).
- b) The deceased Newborn can be added with the no parent ULI code of "Unable to locate parent", thereby reducing the risk of a health card being issued

If the newborn has already been added to PD, See: [Update Person, Date of Death](#).



### Add Newborn

\* required

**Parent Information:**

Parent PHN/ULI:   \*

-OR-

No Parent ULI Reason:  \*

---

**Newborn Information**

**Preferred Name:**

Last Name:  \*

First Name:   No First Name\*

Middle Name:

Suffix:

---

**Person Details:**

Gender:  \*

Date of Birth:  \*

(YYYY-MMM-DD)

Birth Order:  \* of  \*

Registration Facility:  \*

Date of Death:  \*

(YYYY-MMM-DD)

Stillborn

1. A deceased newborn can be linked to a **Parent PHN / ULI** (See [Registering a Newborn, Step 2](#)) or the can be added with a **No Parent ULI Reason**. **NOTE:** If a **No Parent ULI Reason** is entered, complete the **Civic Mailing Address** and **Residential Phone Number**.
2. A **First Name** is not required to be entered and the parent's last name can be used to identify the patient record.
3. Select the Newborn's **Gender**.
4. Enter the **Date of Birth**
5. **Birth Order** is selected from a drop-down list. **NOTE:** When adding multiple newborns (e.g. twins), **Birth Order** defaults to the previous entry.
6. The **Registration Facility** field has an auto-complete functionality allowing you to either type in part or all of a facility number or name and a drop-down list of active valid facilities to chose from will appear. The addition of Newborns within PD is based on the facility where the registration is entered.
7. Enter the **Date of Death** for the deceased newborn
8. Click **Submit**. A confirmation screen will appear and includes the **Deceased Date** of the Newborn.

Person Directory

**Add Newborn Confirmation**

The person has been added successfully.  
 Click [here](#) to add another person with shared demographic information.

ULI: 68082-7114 Preferred Name: Doe, Lee Gender: Female Date of Birth: 2012-Jul-01 Birth Order: 1 of 1 - Singleton Registration: 042 - Grey Nuns Community Facility: Hospital <div style="border: 1px solid red; padding: 2px; display: inline-block;">Deceased Date: 2012-Jul-01</div>	Parent Name: Doe, Lee Lynette Residential/Mailing: 321 Mill Maze Ne Edmonton, Alberta Canada T5J 4E5 <small>As of: 2012-Jul-10</small> Residential/Telephone: (780) 555-9876 <small>As of: 2012-Jul-10</small>
--	--

## Registering a Stillborn Newborn

The NMS program and the Morbidity, Ambulatory Care Abstract Reporting (MACAR) do not require stillborns to be assigned ULIs; therefore, they *do not* need to be registered in Person Directory.

If an autopsy is performed on a stillborn, there is a need to assign a ULI to a stillborn for medical claim billing purposes. If this is the case, it is imperative that the stillborn indicator be selected on the stillborn/newborn's record otherwise an Alberta Personal Health Card could be issued in error.

*If the stillborn is in the process of being added to Person Directory:*

- a) A stillborn will have to be added through the **Add Newborn** screen within Person Directory and marked as Stillborn (Note: the **Add Newborn** screen has edits in place preventing the stillborn from being added under any other registration type).
- b) The stillborn *can* be linked to the parent's ULI. Alternatively, the stillborn can be added with the **no parent ULI** code of "**Unable to locate parent**", thereby reducing the risk of a health card being issued.

In both cases, select the **Stillborn** checkbox.

Person Directory

**Add Newborn**

**Parent Information:**

Parent PHN/ULI:   \*

\* required

-OR-

No Parent ULI Reason:  \*

---

**Newborn Information**

**Preferred Name:**

Last Name:  \*

First Name:   No First Name \*

Middle Name:

Suffix:

---

**Person Details:**

Gender:  \*

Date of Birth:  \*  
(YYYY-MMM-DD)

Birth Order:  \* of  \*

Registration Facility:  \*

Date of Death:

(YYYY-MMM-DD)

Stillborn

---

**Residential Address:**

No Address

1. A deceased newborn can be linked to a **Parent PHN / ULI** (See [Registering a Newborn, Step 2](#)) or the can be added with a **No Parent ULI Reason**. **NOTE:** If a **No Parent ULI Reason** is entered, complete the **Civic Mailing Address** and **Residential Phone Number**.
2. A **First Name** is not required to be entered and the parent's last name can be used to identify the patient record.
3. Complete the **Person Details**
4. Select the Newborn's **Gender**. PD cannot register an unknown gender. To register a Stillborn, where the gender is unknown, the user needs to register the Stillborn normally, selecting **Male** or **Female** for gender. Once registered, the user needs to contact the PD Help Desk at (780) 427-1494 to have the gender properly assigned to unknown (this is a function that can only be done in Central Stakeholder Registry and is not a capable function within PD).
5. Enter the **Date of Birth**
6. **Birth Order** is selected from a drop-down list. **NOTE:** When adding multiple newborns (e.g. twins), **Birth Order** defaults to the previous entry.
7. Check the **Stillborn** Check box. When stillborn is selected, the Date of Death will be populated with the information from the Date of Birth.
8. Click **Submit**. A confirmation screen will appear and includes the **Deceased Date** of the Newborn.

Person Directory

**Add Newborn Confirmation**

The person has been added successfully.  
Click [here](#) to add another person with shared demographic information.

ULI: 45646-4114 Preferred Name: Julipe, Jennifer Gender: Female Date of Birth: 2010-Dec-12 Birth Order: 1 of 1 - Singleton Registration Facility: 065 - Seton - Jasper Healthcare Centre Deceased Date: 2010-Dec-12 Stillborn	Residential/Mailing: 141 Kity Close Edmonton, Alberta Canada Residential/Telephone: (780) 412-3652 <small>As of: 2010-Dec-14</small>
--	--

View/Update Person
New Search

## Updating a Newborn

The **Newborn Information** link on the View / Update Person screen is available to update newborn's specific demographics (Parent's ULI, Registration Facility, Birth Order, and Birth Count) for up to **90 days**. This will **NOT** change the definition of adding a newborn of **28 days** or less and born in Alberta.

The availability of the link for 90 days allows users to update the newborn's specific demographics due to data entry errors.

1. Enter infant into the **Person Search Criteria** and click **Search**.
2. Select the **infant** from the **Search list**.

Person Directory

**Doe,**  
PHN/ULI:15398-7114

**View/Update Person**

<p><b>Name and Person Details:</b> [ <a href="#">edit...</a> ]</p> <p>Preferred Name: Doe                      Gender: Male                      Date of Birth: 2012-Jul-31                      Added in Error: No                      [ <a href="#">view all names...</a> ]</p> <p><b>Address and Phone Numbers:</b> [ <a href="#">edit...</a> ]</p> <p>Residential/Mailing: 2 21 Via                      Edmonton, Alberta                      Canada</p>	<p><b>Eligibility:</b>                      Not Currently Eligible                      [ <a href="#">view eligibility...</a> ]</p> <hr/> <p><b>Additional Information:</b></p> <ul style="list-style-type: none"> <li style="border: 1px solid red; display: inline-block; padding: 2px;">• <b>Newborn Information</b></li> <li>• <a href="#">Alberta Personal Health Card Requests</a></li> <li>• <a href="#">Alternate IDs</a></li> <li>• <a href="#">Merge Potential Duplicates</a></li> <li>• <a href="#">Registration Validation</a></li> <li>• <a href="#">Residency</a></li> <li>• <a href="#">Secondary ULIs</a></li> </ul>
---	--

3. Click the **Newborn Information** link in the Additional Information section of the View/Update Person screen.

**Doe,** Person Directory  
PHN/ULI:15398-7114

**Update Newborn Information**

**Parent Information:** \* required  
PHN/ULI: 94393-7114   
Name: Doe, Mrs Mother

**Newborn Information:**  
Birth Order: 1 \* of 1 - Singleton \*  
Registration Facility: 042 - Grey Nuns Community Hospital \*  
 Stillborn

4. Click Clear Parent to update the Parent Information
5. Enter a different number for the Birth Order if the birth order is incorrect.
6. Change the number of births for the Birth Order if applicable

### If the stillborn has already been added to Person Directory

If the newborn has already been added to PD, the stillborn indicator should be selected immediately on the newborn's record, to minimize the possibility of an Alberta Personal Health Card being mailed in error.

1. Complete steps 1-3 of [Updating a Newborn](#).

**Doe,** Person Directory  
PHN/ULI:15398-7114

**Update Newborn Information**

**Parent Information:** \* required  
PHN/ULI: 94393-7114   
Name: Doe, Mrs Mother

**Newborn Information:**  
Birth Order: 1 \* of 1 - Singleton \*  
Registration Facility: 042 - Grey Nuns Community Hospital \*  
 Stillborn

2. In the Update Newborn Information screen under the Newborn Information section, click on the **Stillborn** check box to record the newborn birth as a stillbirth.
3. Then click on the **Submit** button to update your record.



**NOTE:** If the parent and Infant were newly added to PD and the record is less than 7 days old, a warning message may appear. This means that some of the information between the parent and the infant records has recently been updated. Click **Submit** a second time to commit the changes to the data.

**Update Newborn Information**

ADDRESS CHANGED WITHIN THE LAST 7 DAYS.  
 Associated Addresses Will be UPDATED  
 ADDRESS CHANGED WITHIN THE LAST 7 DAYS.

Doe, <b>(stillborn)® Deceased</b>		Person Directory
PHN/ULI:15398-7114		
<b>View/Update Person</b>		
<b>Name and Person Details:</b> Preferred Name: Doe Gender: Male Date of Birth: 2012-Jul-31 Added in Error: No		[ <a href="#">edit...</a> ] <b>Eligibility:</b> Not Currently Eligible [ <a href="#">view eligibility...</a> ] <hr/> <b>Additional Information:</b> • <a href="#">Newborn Information</a>

- The stillborn status will be updated on the newborn record.
- The View/Update Person screen shows the newborn as deceased with a stillborn status in the record header tab.

See Also:

[Registering a Deceased Newborn](#), or  
[Update Person – Date of Death](#)

**Register a Visitor to Alberta**



**NOTE:** Important Note: any **newborn that is 28 days or less** in age and was born in Alberta, **only** the Newborn link on the **Add Person** screen can be used to register the patient.

admin1\_tr01, test @ Person Directory  
Test Physician Office:Default

Help | Quit

Person Directory

**Add Person**

Choose one of the following registration types:

- [Newborn \(born in Alberta, 28 days or under\)](#)
- [Visitor to Alberta \(e.g. out of province or out of country\)](#)
- [Federally Insured \(Canadian Forces, Federal Inmates, Federally Insured Refugees\)](#)
- [Resident of Alberta \(e.g. new resident or not previously registered\)](#)
- [Dependant Child \(of already registered parent e.g. Adopted\)](#)

Back

1. Select **Visitor to Alberta (e.g. out of province or out of country)** from the **Add Person** screen

admin1\_tr01, test @ Person Directory  
Test Physician Office:Default

Help | Quit

Person Directory

**Add Visitor**

\* required

**Preferred Name:**

Title: Ms

Last Name: Doe \*

First Name: Dodi \*

No-First-Name: -- Select --

Reason:

Middle Name:

Suffix: -- Select --

**Additional Information:**

Gender: Female \*

Date of Birth: 1978-Dec-02  Unknown \*  
(YYYY-MM-DD)  
(DOB mandatory if visiting from within Canada)

Province of Birth: Outside AB \*

**Residential Address:**

Enter the visitor's person demographic data

2. Enter the **Preferred Name** information.
  - i. Only **Last** and **First** Name (or **No-First-Name Reason**) are mandatory.
3. Complete the **Additional Information** fields.
  - i. **Gender** and **DOB** are mandatory.
  - ii. The **Province of Birth** must be set to **Outside AB**.

**Residential Address:**

Partial:

Addressee:

Descriptive Note:

Civic Mailing Address:

*Extra Address Information*

*Number Suffix Name (e.g. Millwoods) Type Direction*

*Unit Type Unit Number (e.g. 10)*

\*

*City Province/State*

\*

*Country*

*Postal/Zip Code*

- OR -

Delivery Installation Address:

4. A full **Civic Mailing** or **Delivery Installation** Address must be entered or the **Partial** checkbox can be selected to enter only the **City, Province** and **Country**.

Select which type of Visitor to Alberta being registered:

[Register a Visitor to Alberta \(Out of Province\)](#)

[Register a Visitor to Alberta \(Out of Country\)](#)



## Register a Visitor to Alberta (Out of Province)

**Phone Number:**

Usage: Residential

Type: Telephone  Unlisted Phone Number

Phone Number: 204 5555555

area phone ext.

-OR-

International Phone:

cntry route phone

Phone Number Start Date:

(YYYY-MMM-DD)

---

Visiting from **within** Canada

Out of Province ID Type: Manitoba Health Number -OR-  Out of Province ID not provided

Out of Province ID: 117508170

---

Visiting from **outside** Canada

Country of Origin: -- Select --

Date of Entry into Canada:

(YYYY-MMM-DD)

1. Enter a **Phone Number** for the patient
2. Select the **Visiting from within Canada** radio button.
3. Record the type of ID verified by selecting the **Out of Province ID Type** from the drop-down box and enter the **Out of Province ID**. The Out of Province ID number must be valid and must pass an algorithm that checks the validation. Click the **Help** Button at the top of the screen for a list of the validation patterns.  
**or**  
Check the **Out of Province ID not provided** if ID was not viewed.
4. Click **Submit**

Person Directory

**Add Visitor Confirmation**

The person has been added successfully.  
Click [here](#) to add another person with shared demographic information.

<p style="border: 1px solid red; display: inline-block; padding: 2px;">ULI: 25298-7114</p>	<p>Partial Residential/Mailing: Flin Flon, Manitoba Canada</p>
<p>Preferred Name: Doe, Ms Dodi Gender: Female Date of Birth: 1978-Dec-02</p>	<p>Residential/Telephone: (204) 555-5555 <small>As of: 2012-Jul-30</small></p>
<p>Out of Province ID Type: Manitoba Health Number</p>	<p><small>As of: 2012-Jul-30</small></p>
<p>Out of Province ID: 117508170</p>	

5. The **Add Visitor Confirmation** screen will display the information entered as well as the new **ULI** assigned to the patient.
6. Click the **here** button to add a spouse or dependant. See [Add a Dependant](#)
7. Click **View / Update Person** to see the newly created patient's personal record and add additional information
8. Click **New Search** to return to the **Person Search Criteria** Page

### Register a Visitor to Alberta (Out of Country)

**Phone Number:**

Usage: Residential   
 Type: Telephone   Unlisted Phone Number

Phone Number:     
area phone ext.

-OR-

International Phone:      
cntry route phone

Phone Number Start:   
 Date: (YYYY-MMM-DD)

---

Visiting from **within** Canada

Out of Province ID: -- Select --  -OR-  Out of Province ID not provided

Type:   
 Out of Province ID:

---

Visiting from **outside** Canada

Country of Origin: Australia   
 Date of Entry into Canada: 2012-Jun-30  
(YYYY-MMM-DD)

1. Enter the **International Phone Number** for the patient
2. It is mandatory to select the **Visiting from outside Canada** radio button.
3. Selecting the **Country of Origin** from the drop-down box is optional. If entering a Country of Origin, the **Date of Entry into Canada** is mandatory. If the date is not known, enter the date the patient presents at the health service facility.
4. Click **Submit**

Person Directory

**Add Visitor Confirmation**

The person has been added successfully.  
Click [here](#) to add another person with shared demographic information.

<p>ULI: 35297-7114</p> <p>Preferred Name: Doe, Mr. Jack</p> <p>Gender: Male</p> <p>Date of Birth: 1975-Jul-30</p> <p>Country of Origin: Australia</p> <p>Canada Entry Date: 2012-Jun-30</p>	<p>Partial Residential/Mailing: Brisbane, Australia</p> <p>Residential/Telephone: 011-45263-01423</p> <p><small>As of: 2012-Jul-30</small></p>
---	--

5. The **Add Visitor Confirmation** screen will display the information entered as well as the new **ULI** assigned to the patient.
6. Click the **here** button to add a spouse or dependant. See [Add a Dependant](#)
7. Click **View / Update Person** to see the newly created patient's personal record and add additional information
8. click **New Search** to return to the **Person Search Criteria** Page



**NOTE:** If the patient supplies their full address, it can be entered to the Physical Address section of their record. See [Add Physical Address](#)

### **Federally Insured Person**



**NOTE:** Important Note: any **newborn that is 28 days or less** in age and was born in Alberta, **only** the Newborn link on the **Add Person** screen can be used to register the patient.

1. Select **Federally Insured (Canadian Forces, Federal Inmates, Federally Insured Refugees)** from the **Add Person** screen

2. Enter the visitor's person demographic data
3. Enter the **Preferred Name** information.
  - i. Only **Last** and **First** Name (or **No-First-Name Reason**) are mandatory.
4. Complete the **Person Details** fields.
  - i. **Gender** is mandatory,
  - ii. Entering **DOB** is optional, however if the DOB is not entered, the **Unknown** checkbox must be selected.
  - iii. The **Province of Birth** is mandatory.
  - iv. If known, enter the **Alternate ID Type** (options are: Canadian Forces Number and Veterans Affairs Canada Number) and the **Alternate ID**. These fields are optional.  
**Note:** If the Alternate ID Type is entered, an Alternate ID Number is required.

The number must be valid and must pass an algorithm digit validation. E.g. the digit validation for Canadian Forces is **annnnnnnn**

Alternate ID Type: Canadian Forces Number  
Alternate ID: F01232667

**Residential Address:**  
Partial:   
Addressee:   
Descriptive Note:

Civic Mailing Address:

Extra Address Information  
  4  Road   
Number Suffix Name (e.g. Millwoods) Type Direction

Unit Type Unit Number (e.g. 10)

Stony Plain \* Alberta  
City Province/State

Canada \*  
Country

T7Z 1X4  
Postal/Zip Code

- OR -  
 Delivery Installation Address:

5. A full **Civic Mailing** or **Delivery Installation** Address must be entered or the **Partial** checkbox can be selected to enter only the **City, Province** and **Country**.

Postal/Zip Code

**Phone Number:**  
Usage: Residential  
Type: Telephone  Unlisted Phone Number

Phone Number: 780 5555555  
area phone ext.

- OR -  
International Phone:     
country route phone

Phone Number Start Date: 2012-Jul-31  
(YYYY-MMM-DD)

6. If known, enter a **Phone Number** for the patient.
7. Click **Submit**

**Person Directory**

**Add Federally Insured Confirmation**

The person has been added successfully.

ULI: 18293-7114	Residential/Mailing: 41 4 Rd Stony Plain, Alberta Canada T7Z 1X4 <small>As of: 2012-Jul-31</small>
Preferred Name: Doe, Mr. Ted	Residential/Telephone: (780) 555-5555 <small>As of: 2012-Jul-31</small>
Gender: Male	
Date of Birth: 1970-Jul-31	
Alternate ID Type: Canadian Forces Number	
Alternate ID: F01232667	

View/Update Person    New Search

8. The **Add Visitor Confirmation** screen will display the information entered as well as the new **ULI** assigned to the patient.
9. Click the **here** button to add a spouse or dependant. See [Add a Dependant](#)
10. Click **View / Update Person** to see the newly created patient's personal record and add additional information
11. Click **New Search** to return to the **Person Search Criteria** Page

## Resident Of Alberta

### [Resident Of Alberta](#)

### [Register a Resident of Alberta – Homeless and/or No Fixed Address](#)

## Resident Of Alberta



**NOTE:** Important Note: any **newborn that is 28 days or less** in age and was born in Alberta, **only** the Newborn link on the **Add Person** screen can be used to register the patient.

**Person Directory**

**Add Person**

Choose one of the following registration types:

- [Newborn \(born in Alberta, 28 days or under\)](#)
- [Visitor to Alberta \(e.g. out of province or out of country\)](#)
- [Federally Insured \(Canadian Forces, Federal Inmates, Federally Insured Refugees\)](#)
- **[Resident of Alberta \(e.g. new resident or not previously registered\)](#)**
- [Dependant Child \(of already registered parent e.g. Adopted\)](#)

Back

1. Select **Resident of Alberta (e.g. new resident or not previously registered)** from the **Add Person** screen

**Person Directory**

**Add Alberta Resident**

Registration Date: 2012-Jul-31 \*

**Preferred Name:**

Title: Miss

Last Name: Doe \*

First Name: Jessie \*

Middle Name:

Suffix: -- Select --

---

**Person Details:**

Gender: Female \*

2. Enter the visitor's person demographic data
3. Enter the **Preferred Name** information.
  - i. Only **Last** and **First** Name (or **No-First-Name Reason**) are mandatory.

Middle Name:

Suffix: -- Select --

---

**Person Details:**

Gender: Female \*

Date of Birth: 1961-Jun-19  Unknown \*  
(YYYY-MMM-DD)

Province of Birth: Within AB \*

Marital Status: Married

Province/State of Origin: -- Select --

Country of Origin: Argentina

Alberta Entry Date: 2007-Feb-01  
(YYYY-MMM-DD)  
(Leave blank if province of origin is Alberta)

Canada Entry Date: 2007-Jan-04  
(YYYY-MMM-DD)  
(Leave blank if country of origin is Canada)

Alternate ID Type: -- Select --

Alternate ID:

---

**Residential Address:**

Homeless and/or No Fixed Address

4. Complete the **Person Details** fields.
  - i. **Gender** is mandatory,
  - ii. Entering **DOB** is optional, however if the DOB is not entered, the **Unknown** checkbox must be selected.
  - iii. The **Province of Birth** is mandatory.

- iv. If **Country of Origin** is entered then the **Alberta Entry** and **Canada Entry** dates are required

Alternate ID Type: --Select--  
Alternate ID:

---

**Residential Address:**

Homeless and/or No Fixed Address

Addressee:

Descriptive Note:

Civic Mailing Address:

*Extra Address Information*

Number Suffix Name (e.g. Millwoods) Type Direction

Unit Type Unit Number (e.g. 10)

\*  \*  
City Province/State

\*  
Country

Postal/Zip Code

- OR -

Delivery Installation Address:

5. A full **Civic Mailing** or **Delivery Installation** Address must be entered or the **Partial** checkbox can be selected to enter only the **City, Province** and **Country**.

Postal/Zip Code

---

**Residential Phone Number:**

Usage:

Type:   Unlisted Phone Number

Phone Number:     
area phone ext.

-OR-

International Phone:     
cntry route phone

Phone Number Start:

Date:   
(YYYY-MMM-DD)

6. Enter a **Phone Number** for the patient.
7. Click **Submit**



Person Directory

**Add Alberta Resident Confirmation**

The person has been added successfully.  
Click [here](#) to add another person with shared demographic information.

ULI: 54397-7114		
Preferred Name: Doe, Miss Jessie	Residential/Mailing:	67 1/2 Yamaha View
Gender: Female		Edmonton, Alberta
Date of Birth: 1961-Jun-19		Canada
Marital Status: Married		T5J 3E4
Country of Origin: Argentina	Residential/Telephone:	(780) 555-5555
Alberta Entry Date: 2007-Feb-01		<small>As of: 2012-Jul-31</small>
Canada Entry Date: 2007-Jan-04		<small>As of: 2012-Jul-31</small>

8. The **Add Alberta Resident Confirmation** screen will display the information entered as well as the new **ULI** assigned to the patient.
9. Click the **here** button to add a spouse or dependant. See [Add a Dependant](#)
10. Click **View / Update Person** to see the newly created patient's personal record and add additional information
11. Click **New Search** to return to the **Person Search Criteria** Page

### Register a Resident of Alberta – Homeless and/or No Fixed Address



**NOTE:** Important Note: any **newborn that is 28 days or less** in age and was born in Alberta, **only** the Newborn link on the **Add Person** screen can be used to register the patient.

1. Follow steps 1 – 4 of [registering a Resident of Alberta](#)
2. Select the Homeless and/or No Fixed Address check box if the address is not known. Also select the Civic Mailing or Delivery Installation Address with the City, Province and Country entered. For example, this person is homeless but states that they live permanently in Alberta.
3. Click **Submit**.
4. The **Add Alberta Resident Confirmation** screen will display the information entered as well as the new **ULI** assigned to the patient.

### Register a Dependent Child – Parent/Guardian PHN entered



**NOTE:** Important Note: any **newborn that is 28 days or less** in age and was born in Alberta, **only** the Newborn link on the **Add Person** screen can be used to register the patient.

1. Select **Dependant Child (of already registered parent e.g. Adopted)** from the **Add Person** screen



**NOTE:** The Dependant Child link can only be used for children under 16 years of age.

2. Enter the parent **PHN**
3. Click **Find**



**NOTE:** If the Parent PHN number is not known, leave the field blank and click Find to search for the parent. See [Search for a Patient File](#).

**Mcdaniel, Flonce Iann** Validated Person Directory  
PHN/ULI: 10013-5009

**Person Confirmation**  
*Please confirm this is the correct parent.*

Residential/Mailing: 100 Chaparral Villas Se Calgary, Alberta Canada T2X 3N4 <small>As of: 2004-Aug-09</small>	
Gender: Female	
Date of Birth: 1978-Jul-25	
Eligibility Start Date: 2009-Jan-01	



**NOTE:** If the Parent does not have an eligibility start date, then the child can not be registered as a 'dependant'. The child would then be added as a resident of Alberta and the association to the parent ULI would be done once the parents are eligible.

4. Confirm that the information is for the correct parent
5. Click **Accept**

Person Directory

**Add Dependant Child**

\* required

**Parent/Guardian Information:**

PHN: 10013-5009	<input type="button" value="Clear Parent"/>
Preferred Name: Mcdaniel, Flonce Iann	
Residential/Mailing: 100 Chaparral Villas Se Calgary, Alberta Canada T2X 3N4 <small>As of: 2004-Aug-09</small>	
Residential/Telephone: (403) 212-4626 <small>As of: 2008-Feb-10</small>	

**Dependant Child Information:**  
Registration Date:

6. The **Add Dependant Child** screen will refresh and the Parent / Guardian Information will be populated.

Person Directory

**Add Dependant Child**

**Parent/Guardian Information:** \* required

PHN: 10013-5009

Preferred Name: Mcdaniel, Flonce Iann

Residential/Mailing: 100 Chaparral Villas Se  
 Calgary, Alberta  
 Canada  
 T2X 3N4  
As of: 2004-Aug-09

Residential/Telephone: (403) 212-4626  
As of: 2008-Feb-10

---

**Dependant Child Information:**

Registration Date: 2012-Aug-01\*

Dependant Reason: Adopted\*

Date Placed in Care: 2011-Sep-01

---

Preferred Name:

7. Complete the **Dependant Child Information**.
  - i. The **Registration Date** will auto populate to today's date
  - ii. Enter the **Dependant Reason**. Options are: Adopted, Custody, Guardianship and Parent of
  - iii. Enter the **Date Placed in Care** for the child. This date must be within two years of today's date.



**NOTE: Adding Adopted Dependents – Date Placed in Care**

When adding an **adopted** dependant child, the date placed in care becomes a mandatory field. Either the date given by the adoptive parent or when the adoption took place, or if that date is unknown the date of registration can be entered. The date entered must be within two years of the current date.

This will ensure that eligibility is automatically established for the adopted dependant provided the parent/guardian has current Alberta Health Care Insurance Plan coverage. The adopted dependant child's eligibility may take up to 3 business days before it shows in Person Directory and a personal health card is mailed.

Date Placed in Care: |2009-Sep-01  
(YYYY-MMM-DD)

---

**Preferred Name:**

Last Name: |Doe| \*

First Name: |Jake| \*

Middle Name: | |

Suffix: |-- Select --|

---

**Person Details:**

Gender: |Male| \*

Date of Birth: |2008-Mar-01| \*

Province of Birth: |Outside AB| \*

Province/State of Origin: |British Columbia|

Country of Origin: |Canada|

Alberta Entry Date: |2009-Sep-01|  
(YYYY-MMM-DD)

Canada Entry Date: | |  
(YYYY-MMM-DD)

Out of Province ID Type: |-- Select --|

Out of Province ID: | |

Back Submit Cancel

8. Enter the **Preferred Name** information.
  - i. Only **Last** and **First** Name are mandatory.
  - ii. Complete the **Person Details** fields.
9. Complete the **Person Details** fields.
  - i. **Gender** and **DOB** is mandatory,
  - ii. The **Province of Birth** is mandatory. Options are: **Outside AB** or **Within AB**
  - iii. If Province of Birth is outside of Alberta, enter the **Province/State of Origin**, and or **Country of Origin** if known
  - iv. If a Province / State of Origin is entered, the **Alberta Entry Date** is mandatory.
  - v. If known, enter the **Out of Province ID Type** (options include: Canadian Forces Number, Treaty Number, Veterans Affairs Canada Number or the health number for another Province or Territory) and the **Out of Province ID**. These fields are optional.

**Note:** If the Alternate ID Type is entered, an Alternate ID Number is required. The number must be valid and must pass an algorithm digit validation. E.g. the digit validation for Canadian Forces is **annnnnnnn**
10. Click **Submit**

Person Directory

**Add Dependant Child Confirmation**

The person has been added successfully.  
Click [here](#) to add another dependant child for the same parent/guardian.

<b>ULI:</b> 77398-7114	<b>Residential/Mailing:</b> 100 Chaparral Villas Se	
<b>Preferred Name:</b> Doe, Jake	Calgary, Alberta	
<b>Gender:</b> Male	Canada	
<b>Date of Birth:</b> 2008-Mar-01	T2X 3N4	<small>As of: 2012-Aug-01</small>
<b>Province/State of Origin:</b> British Columbia	<b>Residential/Telephone:</b> (403) 212-4626	<small>As of: 2012-Aug-01</small>
<b>Country of Origin:</b> Canada		
<b>Alberta Entry Date:</b> 2009-Sep-01		

11. The **Add Dependant Child Confirmation** screen will display the information entered as well as the new **ULI** assigned to the patient.
12. Click the **here** button to add another dependant child to the **same** parent / guardian.
13. Click **View / Update Person** to see the newly created patient's personal record and add additional information
14. Click **New Search** to return to the **Person Search Criteria** Page

## Updating

### Identity Validation

Effective January, 2010, PD users will no longer be able to modify the Alberta Health Preferred Name Title, Last Name, First Name, Middle Name, Suffix, Gender, and Date of Birth, once a **person's identity** has been validated in the Ministry's Central Stakeholder Registry (CSR). All identity validation of Alberta residents will be conducted either by Alberta Health personnel or at pilot Alberta Registry Agent Offices.

If a person's **Date of Birth (DOB)** has been validated in CSR, the PD user will no longer be able to edit the Date of Birth (DOB) within PD.

The only validation functionality left for PD users will be the ability to validate a person's Date of Death (DOD) based on verifying supporting documentation.

### The Validated Icon on Search Results

If a **person's identity** has been validated in CSR, a Validated icon appears in the **Search Results** screen.

Person Directory						
Search Results						
	Full Name	Name Type	Age	City	Date of Birth	Gender
	<a href="#">Smith, A Edward</a>	Preferred	33 Year(s)	Lethbridge	1978-Dec-08	Male
	<a href="#">Smith, Adam</a>	Preferred	34 Year(s)	Edmonton	1978-Jul-28	Male
Validated	<a href="#">Smith, Arthur Dominic</a>	Preferred	35 Year(s)	Lethbridge	1977-Apr-21	Male
	<a href="#">Smith, Barrie Peter</a>	Preferred	33 Year(s)	De Winton	1978-Aug-16	Male
	<a href="#">Smith, Bob</a>	Preferred	36 Year(s)	Lougheed	1976-Feb-09	Male
	<a href="#">Smith, Larry G</a>	Preferred	34 Year(s)	Manning	1978-Jul-03	Male
	<a href="#">Smith, Liza</a>	Preferred	35 Year(s)	Athabasca	1976-Sep-29	Male
	<a href="#">Smith, Lorne Ernest</a>	Preferred	34 Year(s)	St. Albert	1978-Apr-19	Male
	<a href="#">Smith, Michael</a>	Preferred	35 Year(s)	Courtenay	1976-Sep-25	Male
	<a href="#">Smith, Oscar Wyatt Albert</a>	Preferred	35 Year(s)	Drayton Valley	1976-Oct-15	Male
	<a href="#">Smith, Stacey Norman</a>	Preferred	35 Year(s)	Keg River	1977-Mar-11	Male
	<a href="#">Smith, Thomas Cyril</a>	Preferred	34 Year(s)	La Crete	1977-Sep-06	Male
	<a href="#">Smith, Walter James</a>	Preferred	35 Year(s)	Sherwood Park	1976-Aug-25	Male

New Search   Refine Search   Add Person

The Validated Icon on the View/Update Person page

Also, if a person's identity has been validated by Alberta Health or a registry agent office, a **Validated** icon appears in the **View/Update** Person screen.

Smith, Arthur Dominic Validated Person Directory  
PHN/ULI:94649-

### A Validated Record and Updating Preferred Name and Person Details

If the person's identity has been validated, the Title, Last Name, First Name, Middle Name, Suffix, Gender and DOB will not be able to be edited.

Smith, Arthur Dominic Validated Person Directory  
PHN/ULI:94649-0104

**Update Preferred Name and Person Details**

**Preferred Name**

Title: Mister  
Last Name: Smith  
First Name: Arthur  
Middle Name: Dominic  
Suffix:  
Gender: Male

Marital Status:

**Date of Birth Details**

Date of Birth: 1977-Apr-21  
(YYYY-MM-DD)

**Date of Death Details**

Date of Death:   
(YYYY-MM-DD)

Document Type:

Issuing Authority:

Effective/Expiry Date:   
(YYYY-MM-DD)

Submit   Cancel

## Update Name and Date of Birth – Non Validated Record

(If the person’s identity has **not** been validated within CSR)

1. **Search** for and **Select** the patient record to be updated.

**Sosa Hirsch, Makena** Person Directory  
 PHN/ULI:10001-9009

**View/Update Person**

**This person does not currently have Alberta Health Care Insurance Plan coverage.**  
 Please choose one of the following before updating this person's information:

- [This person is a resident of Alberta requesting AHCIP coverage](#)
- [This person is a visitor to Alberta](#)
- [This person is a Federally Insured person \(Canadian Forces, Federal Inmate, Federally Insured Refugees\)](#)

**Name and Person Details:** [ edit... ]

Preferred Name: Sosa Hirsch, Makena  
 Gender: Female  
 Date of Birth: 1970-Jan-19  
 Added in Error: No  
[ view all names... ]

**Address and Phone Numbers:** [ edit... ]

**Eligibility:**  
 Not Currently Eligible  
[ view eligibility... ]

**Additional Information:**

- [Alberta Personal Health Card Requests](#)
- [Alternate IDs](#)
- [Merge Potential Duplicates](#)
- [Registration Validation](#)
- [Residency](#)
- [Secondary ULI's](#)

2. On the **View/Update Person** screen, click **edit** to access the **Update Preferred Name and Person Details**



Sosa Hirsch, Makena
Person Directory

PHN/ULI: 10001-9009

Update Preferred Name and Person Details

**Preferred Name**

Title:

Last Name:

First Name:

Middle Name:

Suffix:

Name Change Reason:

Gender:

Gender Change Reason:

Marital Status:

**Date of Birth Details**

Date of Birth:   
(YYYY-MMM-DD)

**Date of Death Details**

Date of Death:   
(YYYY-MMM-DD)

Document Type:

Issuing Authority:

Effective/Expiry Date:   
(YYYY-MMM-DD)

3. When a **name** is being changed, a **Name Change Reason** must be selected. Options are: Divorced, Legal, Married, Separated, Stakeholder Request, and Update. "Update" is the only name change reason that will not create an Alias.
4. When changing the **Gender**, a **Gender Change Reason** must also be selected. Options are: Correction, and Update
5. The **Marital Status** can be modified. Options are: Common-law, Divorced, Married, Separated, Single, and Widowed.
6. Edit the **Date of Birth** if it was recorded incorrectly.
7. If the correct documents are available, The **Date of Death Details** can be completed and validated from the screen.
8. Click Submit when updates are completed.



**NOTE:** If the Preferred Name fields are not able to be edited, then the record is validated. If any changes are required, the patient will need to contact Alberta Health.

### Add Alias Name Type



**NOTE:** A person may have only one Preferred and one Legal name. Multiple aliases are permitted.

An Alias that is exactly like a Preferred, Legal, Maiden or another Alias name cannot be added.

1. **Search** for and **Select** the patient.

**Doe, Mother** Person Directory  
 PHN/ULI:94393-7114

**View/Update Person**

<p><b>Name and Person Details:</b> <span style="float: right;">[ <a href="#">edit...</a> ]</span></p> <p>Preferred Name: Doe, Mrs Mother          Gender: Female          Date of Birth: 1980-Jan-01          Added in Error: No</p> <p style="text-align: right;">[ <a href="#">view all names...</a> ]</p> <hr/> <p><b>Address and Phone Numbers:</b> <span style="float: right;">[ <a href="#">edit...</a> ]</span></p>	<p><b>Eligibility:</b>          Not Currently Eligible <span style="float: right;">[ <a href="#">view eligibility...</a> ]</span></p> <hr/> <p><b>Additional Information:</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Alberta Personal Health Card Requests</a></li> <li>• <a href="#">Alternate IDs</a></li> <li>• <a href="#">Merge Potential Duplicates</a></li> <li>• <a href="#">Registration Validation</a></li> <li>• <a href="#">Residency</a></li> <li>• <a href="#">Secondary ULIs</a></li> </ul>
--	--

2. On the **View/Update Person** screen, click **view all names...** The View All Names screen will appear.

**Doe, Mother** Person Directory  
 PHN/ULI:94393-7114

**View All Names**

Type	Name	End Reason (if applicable)
Preferred	<a href="#">Doe, Mrs Mother</a>	

[  ]

3. Click **Add Name** to add another name / alias

**Doe, Mother**  
PHN/ULI: 94393-7114

**Add Name**

Name Type: Alias \*  
 Title: Madame  
 Last Name: Doe \*  
 First Name: Mommy \*  
 Middle Name:   
 Suffix: II  
 Document Type: Change of Name Certificate  
 Issuing Authority: 5464  
 Effective/Expiry Date:   
 (YYYY-MMM-DD)

Back Submit Cancel

4. Complete the Add Name fields:
  - i. **Name Type:** Select the category that applies to the name change. Options are: Alias, Legal and Maiden.
  - ii. **Title:** If applicable, select the appropriate Title. Options include, but are not limited to, Mister, Mrs., Ms., Brother, Corporal, Reeve, etc
  - iii. **Last Name:** This field is mandatory. If the name change only affects the first name, enter the patient's existing last name
  - iv. **First Name:** This field is mandatory. If the name change only affects the last name, enter the patient's existing first name.
  - v. **Middle Name:** this field is optional.
  - vi. **Suffix:** If applicable, a suffix can be selected from the drop-down menu. Options are: II, III, IV, Jr., Sr.
  - vii. **Document Type:** Select the document type used to validate the added name.
  - viii. **Issuing Authority:** Is only required when the Name Type: Legal is entered. An example of the Issuing Authority would be: The Vital Statistics Office
  - ix. **Effective / Expire Date:** This optional field can either have the date that the name is effective (e.g. in the case of a marriage/divorce) or the date that the name or the documentation expires.
5. Click **Submit** when the information has been entered. The View All Names screen will appear with the new alias added. **NOTE:** a Duplicate person search is automatically executed by PD when a name is added to a file.

Doe, Mother
Person Directory

PHN/ULI: 94393-7114

**View All Names**

Type	Name	End Reason (if applicable)
Preferred	<a href="#">Doe, Mrs Mother</a>	
Alias	<a href="#">Doe, Mlle. Momma</a>	
Alias	<a href="#">Doe, Mme. Mommy II</a>	

## Update Address and Phone

1. **Search** for and **Select** the patient.

Mcdaniel, Flonce Iann
Validated
Person Directory

PHN/ULI: 10013-5009

**View/Update Person**

**Name and Person Details:** [ [edit...](#) ]

Preferred Name: Mcdaniel, Flonce Iann  
 Gender: Female  
 Date of Birth: 1978-Jul-25  
 Added in Error: No  
 [ [view all names...](#) ]

---

**Address and Phone Numbers:** [ [edit...](#) ]

Residential/Mailing: 100 Chaparral Villas Se  
 Calgary, Alberta  
 Canada  
 T2X 3N4  
As of: 2004-Aug-09

Residential/Telephone: (403) 212-4626  
As of: 2012-Aug-01

[ [view all addresses and phone numbers...](#) ]

**Eligibility:**  
 Current Eligibility Start Date: 2009-Jan-01  
 [ [view eligibility...](#) ]

---

**Additional Information:**

- [Alberta Personal Health Card Requests](#)
- [Alternate IDs](#)
- [Merge Potential Duplicates](#)
- [Registration Validation](#)
- [Residency](#)
- [Secondary ULIs](#)

2. On the **View/Update Person** screen, click **Edit**

**Mcdaniel, Flonce Iann** Validated
Person Directory

PHN/ULI: 10013-5009

**View/Update Address**

**Residential Mailing Address**

**Persons sharing this address:**

*Select the persons that should also have their address updated.  
(Date of birth is shown in brackets)*

Mcdaniel, Kanugonda (1977-Jun-21)

Mcdaniel, Kogularam Edward Sr (2008-Feb-08)

Doe, Jake (2008-Mar-01)

Addressee:

Descriptive Note:

**Civic Mailing Address:**

*Extra Address Information*

<input type="text" value="100"/>	<input type="text" value="--Select--"/>	<input type="text" value="CHAPARRAL"/>	<input type="text" value="Villas"/>	<input type="text" value="South East / Sud-Est"/>
<small>Number</small>	<small>Suffix</small>	<small>Name (e.g. Millwoods)</small>	<small>Type</small>	<small>Direction</small>
<input type="text" value="--Select--"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<small>Unit Type</small>	<small>Unit Number (e.g. 10)</small>			
<input type="text" value="Calgary"/>	<input type="text" value="* Alberta"/>			
<small>City</small>	<small>Province/State</small>			
<input type="text" value="Canada"/>				

3. If there are multiple people sharing the same address, they will all be listed in the Residential Mailing Address section. **Select All** or de-select, **Clear All**, the other residents that will also use the new / updated address.
4. Enter the individual name or a descriptor (e.g. care of XYZ) in the **Addressee** field for the mailing address.
5. Enter additional delivery information in the **Descriptive Note** if applicable.
6. Enter the **new / updated civic** and/or **Delivery Installation** address
  - **Civic Mailing Address** (residential) or **Delivery Installation Address** (Rural Route and general delivery)
  - Enter a note, such as "Change of Address Notification" into the **Extra Address Information** field. This information will appear in the View Address History window.
  - And **Effective Date** if the address does not take effect immediately



**NOTE:** A number of persons may share the same residential mailing address and/or phone number. Ensure you only update the persons requiring a change to their demographic data.

**Note:** In case more than one person is changing address, be sure to update address information before updating phone number information. If you update an address a second time within a week, PD will display a warning message.

**Delivery Installation Address:** Find... Clear All

Extra Address Information

--Select-- Mode of Delivery (e.g. PO Box) Mode of Delivery Identifier (e.g. 12)

--Select-- Delivery Installation Type (e.g. STN) Qualifier (e.g. 'A') Delivery Installation Area

\* Alberta Province/State

Canada Country \*

Postal/Zip Code

Effective Date: 2012-Aug-03 (YYYY-MMM-DD)

Bad Address

Go to Add/Update Residential Phone Number

Back Submit Cancel

7. Click **Bad Address** if the patient is homeless or it is known that mail to this address has been returned. See: [Updating a person's eligibility](#)
8. If the phone number needs to be updated as well, check the **Go to Add/Update Residential Phone Number**.
9. Click **Submit** to save and submit these changes and return to the **View/Update Person** screen.



**NOTE:** If applicable, a warning will appear stating that all the Associated Addresses WILL be UPDATED at the same time.

**Mcdaniel, Flonce Iann** Validated
Person Directory

PHN/ULI:10013-5009

**View/Update Address**

Associated Addresses Will be UPDATED

**Residential Mailing Address**

**Persons sharing this address:**  
*Select the persons that should also have their address updated.  
 (Date of birth is shown in brackets)*

Mcdaniel, Kanugonda (1977-Jun-21)

Mcdaniel, Kogularam Edward Sr (2008-Feb-08)

Doe, Jake (2008-Mar-01)

Click **Submit** a second time once you have confirmed that the additional people will have their address updated. The Update Phone Number screen will appear if you selected the **Go to Add/Update Residential Phone Number**.

**Mcdaniel, Flonce Iann** Validated
Person Directory

PHN/ULI:10013-5009

**Update Phone Number**

<p><b>Residential Telephone Number:</b></p> <p><input type="checkbox"/> Unlisted Phone Number</p> <p>Phone Number: <input type="text" value="403"/> <input type="text" value="2124626"/> <input type="text"/></p> <p style="text-align: center; font-size: small;">-OR- area phone ext.</p> <p>International Phone: <input type="text"/> <input type="text"/> <input type="text"/></p> <p style="text-align: center; font-size: small;">country route phone</p> <p>Effective Date: <input type="text" value="2012-Aug-03"/></p> <p style="text-align: center; font-size: small;">(YYYY-MMM-DD)</p> <p>End Date: <input type="text"/></p> <p style="text-align: center; font-size: small;">(YYYY-MMM-DD)</p> <p>End Reason: <input type="text" value="-- Select --"/></p>	<p><b>Persons sharing this Phone Number:</b>  <i>(Date of birth is shown in brackets)</i></p> <p>Mcdaniel, Kanugonda (1977-Jun-21)</p> <p>Mcdaniel, Kogularam Edward Sr (2008-Feb-08)</p> <p>Doe, Jake (2008-Mar-01)</p> <p><input checked="" type="checkbox"/> Continue sharing phone number with these persons</p>
--	--

10. Enter the new **phone number** and its **effective date**.
11. If the phone number is temporary, enter an **End Date**
12. Select an **End Reason** (**Added in Error**, or **Stakeholder Request**) if applicable
13. If there are multiple people sharing the same address, they will also be listed as sharing the phone number. **Select** or **de-select** the **Continue sharing phone number with these persons** check box as per applicable.
14. Click **Submit**



**NOTE:** Previous addresses and phone numbers can also be accessed by selecting the **View all addresses and Phone numbers** link from the View/Update a Person screen for the patient.

Mcdaniel, Flonce Iann Validated

Person Directory

PHN/ULI: 10013-5009

**View/Update Person**

<p><b>Name and Person Details:</b> <span style="float: right;">[ <a href="#">edit...</a> ]</span></p> <p>Preferred Name: Mcdaniel, Flonce Iann          Gender: Female          Date of Birth: 1978-Jul-25          Added in Error: No  <span style="float: right;">[ <a href="#">view all names...</a> ]</span></p> <hr/> <p><b>Address and Phone Numbers:</b> <span style="float: right;">[ <a href="#">edit...</a> ]</span></p> <p>Residential/Mailing: 100a Chaparral Rd E          Calgary, Alberta          Canada          T2X 3N4  <small>As of: 2012-Aug-03</small></p> <p>Residential/Telephone: (403) 555-5555  <small>As of: 2012-Aug-03</small></p> <div style="border: 1px solid red; padding: 2px; width: fit-content; margin: 5px auto;"> <span style="color: red;">[ <a href="#">view all addresses and phone numbers...</a> ]</span> </div>	<p><b>Eligibility:</b>          Current Eligibility Start Date: 2009-Jan-01  <span style="float: right;">[ <a href="#">view eligibility...</a> ]</span></p> <hr/> <p><b>Additional Information:</b></p> <ul style="list-style-type: none"> <li><a href="#">Alberta Personal Health Card Requests</a></li> <li><a href="#">Alternate IDs</a></li> <li><a href="#">Merge Potential Duplicates</a></li> <li><a href="#">Registration Validation</a></li> <li><a href="#">Residency</a></li> <li><a href="#">Secondary ULIs</a></li> </ul>
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Back
New Search

### Add Physical Address

The physical address is collected when an Alberta resident provides a PO Box or to collect a foreign address under physical address and use the residential mailing address as a contact address in Canada.

1. **Search** for and **Select** the patient.



**Mcdaniel, Flonce Iann** Validated  
 PHN/ULI:10013-5009

**Person Directory**

**View/Update Person**

**Name and Person Details:** [ [edit...](#) ]

Preferred Name: Mcdaniel, Flonce Iann  
 Gender: Female  
 Date of Birth: 1978-Jul-25  
 Added in Error: No  
 [ [view all names...](#) ]

**Address and Phone Numbers:** [ [edit...](#) ]

Residential/Mailing: 100a Chaparral Rd E  
 Calgary, Alberta  
 Canada  
 T2X 3N4  
 As of: 2012-Aug-03

Residential/Telephone: (403) 555-5555  
 As of: 2012-Aug-03

[ [view all addresses and phone numbers...](#) ]

**Eligibility:**  
 Current Eligibility Start Date: 2009-Jan-01  
 [ [view eligibility...](#) ]

**Additional Information:**

- [Alberta Personal Health Card Requests](#)
- [Alternate IDs](#)
- [Merge Potential Duplicates](#)
- [Registration Validation](#)
- [Residency](#)
- [Secondary ULIs](#)

[ Back ] [ New Search ]

- On the **View/Update Person** screen, select the **View all addresses and Phone numbers** link

**Mcdaniel, Flonce Iann** Validated  
 PHN/ULI:10013-5009

**Person Directory**

**View/Update Addresses and Phone Numbers**

**Addresses** [ [add address](#) ] [ [add physical address](#) ]

Residential/Mailing: 100a Chaparral Rd E  
 Calgary, Alberta  
 Canada  
 T2X 3N4  
 As of: 2012-Aug-03

[ [edit](#) ] [ [history](#) ]

**Phone Numbers** [ [add phone number](#) ]

Residential/Telephone: (403) 555-5555 [ [edit](#) ]  
 As of: 2012-Aug-03

[ Back ]

- Select the **Add physical address** link

**Mcdaniel, Flonce Iann** Person Directory  
 Validated  
 PHN/ULI:10013-5009

**Add Physical Address**

Address Usage: Residential  
 Addressee Info:   
 Descriptive Note: Main residence  
 Physical Location: 123 street  
  
  
 City: Paris  
 Province/State: --Select--  
 Country: France  
 Postal/ZIP Code: 23  
 Effective Date: 2012-Aug-03  
 Temporary  
 Start Date:   
 End Date:

Back Submit Cancel

4. Complete the Add Physical Address fields
  - i. Select **Residential** or **Business** from the **Address Usage** Drop-box
  - ii. **Addressee Info** is a free text box
  - iii. **Descriptive Note** is a free text box
  - iv. Enter the address into the **Physical Location** lines
  - v. Enter the **City**
  - vi. If the address is for an out of country location, the **Province / State** can be left as –Select—
  - vii. Locate the **Country** from the drop=box
  - viii. Enter the **Postal/Zip code**
  - ix. The **Effective Date** will default to today's date. This field can be changed if required.
  - x. Enter a **Start** and **End Date** if appropriate.

**Mcdaniel, Flonce Iann** Person Directory

Validated  
 PHN/ULI: 10013-5009

**View/Update Addresses and Phone Numbers**

<p><b>Addresses</b> <span style="float: right;"><a href="#">add address</a>   <a href="#">add physical address</a></span></p> <p>Residential/Mailing: 100a          Chaparral Rd          E          Calgary,          Alberta          Canada          T2X 3N4  <small>As of: 2012-Aug-03</small></p> <p style="text-align: right;"><a href="#">edit</a>   <a href="#">history</a></p> <hr/> <p>Residential/Physical: Main residence          123 Street          Paris,          France          23  <small>As of: 2012-Aug-03</small></p> <p style="text-align: right;"><a href="#">edit</a>   <a href="#">history</a></p>	<p><b>Phone Numbers</b> <span style="float: right;"><a href="#">add phone number</a></span></p> <p>Residential/Telephone: (403) 555-5555 <a href="#">edit</a>  <small>As of: 2012-Aug-03</small></p>
---	--

[Back](#)

- The **View/Update Addresses and Phone Numbers** screen has been refreshed with the new information

### Add Other Phone

- Search** for and **Select** the patient.

**Mcdaniel, Flonce Iann** Validated
Person Directory

PHN/ULI:10013-5009

**View/Update Person**

**Name and Person Details:** [\[ edit... \]](#)

Preferred Name: Mcdaniel, Flonce Iann  
 Gender: Female  
 Date of Birth: 1978-Jul-25  
 Added in Error: No  
[\[ view all names... \]](#)

---

**Address and Phone Numbers:** [\[ edit... \]](#)

Residential/Mailing: 100a Chaparral Rd E  
 Calgary, Alberta  
 Canada  
 T2X 3N4  
As of: 2012-Aug-03

Residential/Telephone: (403) 555-5555  
As of: 2012-Aug-03

[\[ view all addresses and phone numbers... \]](#)

**Eligibility:**  
 Current Eligibility Start Date: 2009-Jan-01  
[\[ view eligibility... \]](#)

---

**Additional Information:**

- [Alberta Personal Health Card Requests](#)
- [Alternate IDs](#)
- [Merge Potential Duplicates](#)
- [Registration Validation](#)
- [Residency](#)
- [Secondary ULIs](#)

Back New Search

- On the **View/Update Person** screen, select the **View all addresses and Phone numbers** link

**Mcdaniel, Flonce Iann** Validated
Person Directory

PHN/ULI:10013-5009

**View/Update Addresses and Phone Numbers**

**Addresses** [add address](#) | [add physical address](#)

Residential/Mailing: 100a Chaparral Rd E  
 Calgary, Alberta  
 Canada  
 T2X 3N4  
As of: 2012-Aug-03

Residential/Physical: Main residence  
 123 Street  
 Paris, France  
 23  
As of: 2012-Aug-03

**Phone Numbers** [add phone number](#)

Residential/Telephone: (403) 555-5555 [edit](#)  
As of: 2012-Aug-03

Back

3. Select the **Add phone number** link

**Mcdaniel, Flonce Iann** Validated  
 PHN/ULI:10013-5009

**Add Phone Number**

**Other Phone Number:**

Phone Usage: Personal  
 Phone Type: Cellular Phone  
 Unlisted Phone Number

Phone Number: 780 5555555  
area phone ext.

-OR-  
 International Phone:     
country route phone

Phone Number Start Date: 2012-Aug-03  
(YYYY-MMM-DD)

Back Submit Cancel

4. Select the **Phone Usage**. Options are: Residential, Personal, and Business.
5. Select the **Phone Type**. Options are: Telephone, Cellular, Fax line, Beeper, and Teletype. **NOTE:** only one record can be recorded for each phone type.
6. Enter the **Phone Number** or **International Phone** Number
7. The **Phone Number Start Date** will default to today's date. If the start date of the phone number is later, enter the date.
8. Click **Submit**

**Mcdaniel, Flonce Iann** Validated  
 PHN/ULI:10013-5009

**View/Update Addresses and Phone Numbers**

Addresses	Phone Numbers
Residential/Mailing: 100a Chaparral Rd E, Calgary, Alberta, Canada, T2X 3N4 <small>As of: 2012-Aug-03</small> <a href="#">add address</a>   <a href="#">add physical address</a>   <a href="#">edit</a>   <a href="#">history</a>	Residential/Telephone: (403) 555-5555 <small>As of: 2012-Aug-03</small> <a href="#">edit</a>
Residential/Physical: Main residence, 123 Street, Paris, France, 23 <small>As of: 2012-Aug-03</small> <a href="#">edit</a>   <a href="#">history</a>	<b>Personal/Cellular Phone: (780) 555-5555</b> <small>As of: 2012-Aug-03</small> <a href="#">edit</a>

Back

- The **View/Update Addresses and Phone Number** will be refreshed with the new information added.

### Update Person – Date of Death.

- Search** for and **Select** the patient.

The screenshot shows the 'View/Update Person' interface for a patient named Lupyciw, Daysie. The patient's PHN/ULI is 99993-0109. The interface is divided into several sections:

- Name and Person Details:** Preferred Name: Lupyciw, Daysie; Gender: Female; Date of Birth: 1941-Feb-24 (Validated); Added in Error: No. There is an [ edit... ] link next to the name.
- Address and Phone Numbers:** Residential/Mailing: 96 Dechene Rd Nw, Edmonton, Alberta, Canada, T6M 2S4. There is an [ edit... ] link next to the address.
- Eligibility:** Current Eligibility Start Date: 1969-Jul-01. There is a [ view eligibility... ] link.
- Additional Information:** A list of links including Alberta Personal Health Card Requests, Alternate IDs, Merge Potential Duplicates, Registration Validation, Residency, and Secondary ULIs.

At the bottom of the form, it says 'As of: 1993-Mar-19'.

- On the **View/Update Person** screen, select the **Edit** link for Name and Person Details

Lupypciw, Daysie
Person Directory

PHN/ULI: 99993-0109

**Update Preferred Name and Person Details**

**Preferred Name**

Title:

Last Name:  \*

First Name:  \*

Middle Name:

Suffix:

Name Change Reason:

Gender:

Gender Change Reason:

Marital Status:

**Date of Birth Details**

Date of Birth: 1941-Feb-24 (Validated)  
(YYYY-MMM-DD)

**Date of Death Details**

Date of Death:   
(YYYY-MMM-DD)

Document Type:

Issuing Authority:

Effective/Expiry Date:   
(YYYY-MMM-DD)

3. Complete the **Date of Death** Details
  - i. Enter the **Date of Death**
  - ii. If the Date of Death is entered and the proof is available, select the **Document Type** if available. Document Types are: Certificate of Death, Medical Certificate of Death, and Registration of Death. **NOTE:** by entering the Document Type the Date of Death will be validated.
  - iii. If the **Document Type** is completed, the **Issuing Authority** and **Effective / Expiry Date** is mandatory.
4. Click **Submit**

**Lupypciw, Daysie** Person Directory

**Deceased**  
PHN/ULI: 99993-0109

**View/Update Person**

<p><b>Name and Person Details:</b> [ <a href="#">edit...</a> ]</p> <p>Preferred Name: Lupypciw, Daysie</p> <p>Gender: Female</p> <p>Date of Birth: 1941-Feb-24 (Validated)</p> <p>Added in Error: No</p> <p><b>Deceased Date: 2012-Aug-06</b> [ <a href="#">view all names...</a> ]</p> <hr/> <p>Address and Phone [ <a href="#">edit...</a> ]</p>	<p><b>Eligibility:</b> Current Eligibility 1969- Start Date: Jul-01 [ <a href="#">view eligibility...</a> ]</p> <hr/> <p><b>Additional Information:</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Alberta Personal Health Card Requests</a></li> <li>• <a href="#">Alternate IDs</a></li> <li>• <a href="#">Merge Potential Duplicates</a></li> <li>• <a href="#">Registration Validation</a></li> <li>• <a href="#">Residency</a></li> <li>• <a href="#">Secondary ULTs</a></li> </ul>
--	--

5. The **View / Update Person** screen has been refreshed with the **Deceased Date** and the label **Deceased** next to the person name.

### Newborn Information

1. **Search** for and **Select** the patient.

**Mcdaniel, Jane** Person Directory

PHN/ULI: 87793-7114

**View/Update Person**

<p><b>Name and Person Details:</b> [ <a href="#">edit...</a> ]</p> <p>Preferred Name: Mcdaniel, Jane</p> <p>Gender: Female</p> <p>Date of Birth: 2012-Aug-01</p> <p>Added in Error: No [ <a href="#">view all names...</a> ]</p> <hr/> <p><b>Address and Phone Numbers:</b> [ <a href="#">edit...</a> ]</p> <p>Residential/Mailing: 100a Chaparral Rd</p>	<p><b>Eligibility:</b> Not Currently Eligible [ <a href="#">view eligibility...</a> ]</p> <hr/> <p><b>Additional Information:</b></p> <ul style="list-style-type: none"> <li>• <b>Newborn Information</b></li> <li>• <a href="#">Alberta Personal Health Card Requests</a></li> <li>• <a href="#">Alternate IDs</a></li> <li>• <a href="#">Merge Potential Duplicates</a></li> <li>• <a href="#">Registration Validation</a></li> <li>• <a href="#">Residency</a></li> <li>• <a href="#">Secondary ULTs</a></li> </ul>
---	--

2. On the **View/Update Person** screen, click **Newborn** Information





**NOTE:** Important Note: the Newborn Information link is only available for 90 days from Date of Birth and the baby is only considered a Newborn if he/she was born in Alberta.

**Mcdaniel, Jane**
Person Directory

PHN/ULI: 87793-7114

**Update Newborn Information**

**Parent Information:** \* required

PHN/ULI: 10013-5009 Clear Parent

Name: Mcdaniel, Flonce Iann

---

**Newborn Information:**

Birth Order:  \* of  \*

Registration Facility:  \*

Stillborn

The Update Newborn Information will be populated with the information entered when the newborn was registered.

All the data on this screen is able to be edited if required.

If the Infant was stillborn, and entered into PD, see [If the stillborn has already been added to Person Directory](#)

## Alberta Personal Health Card Requests

1. **Search** for and **Select** the patient.

**Mcdaniel, Flonce Iann** Validated
Person Directory

PHN/ULI: 10013-5009

**View/Update Person**

<p><b>Name and Person Details:</b> <span style="float: right;">[ <a href="#">edit...</a> ]</span></p> <p>Preferred Name: Mcdaniel, Flonce Iann</p> <p>Gender: Female</p> <p>Date of Birth: 1978-Jul-25</p> <p>Added in Error: No</p> <p style="text-align: right;">[ <a href="#">view all names...</a> ]</p> <hr/> <p><b>Address and Phone Numbers:</b> <span style="float: right;">[ <a href="#">edit...</a> ]</span></p> <p>Residential/Mailing: 100a Chanarral Rd E</p>	<p><b>Eligibility:</b></p> <p>Current Eligibility Start Date: 2009-Jan-01</p> <p style="text-align: right;">[ <a href="#">view eligibility...</a> ]</p> <hr/> <p><b>Additional Information:</b></p> <ul style="list-style-type: none"> <li style="border: 1px solid red; display: inline-block; padding: 2px; margin-bottom: 5px;">• <a href="#">Alberta Personal Health Card Requests</a></li> <li>• <a href="#">Alternate IDs</a></li> <li>• <a href="#">Merge Potential Duplicates</a></li> <li>• <a href="#">Registration Validation</a></li> <li>• <a href="#">Residency</a></li> <li>• <a href="#">Secondary U.I.s</a></li> </ul>
--	---

- On the **View/Update Person** screen, click on **Alberta Personal Health Card Requests**

- Click **Request Alberta Personal Health Card**. The View/Update Person screen will be refreshed with the request



**NOTE:** The **Request Alberta Personal Health Card** button will not be displayed if the patient is not currently eligible or if the PD user has View Only privileges.

Clicking **Back** will return PD to the View/Update Person screen.

- The **View/Update Person** screen will display that the request has been submitted.

**Mcdaniel, Flonce Iann** Validated
Person Directory

PHN/ULI:10013-5009

**Alberta Personal Health Card Requests**

**Current Eligibility Start Date:** 2009-Jan-01

**History of Alberta Personal Health Card Requests**

Date of Request	Time Requested	Requesting Facility
2012-Aug-07	14:26:00	Telus Plaza North:

The **Alberta Personal Health Card Requests** Screen will document when a card was requested and by what facility.

## **Alternate IDs**

### **Add an Alternate ID**

### **End Alternate ID**

### **Add an Alternate ID**

1. **Search** for and **Select** the patient.

**Mcdaniel, Flonce Iann** Person Directory  
 Validated  
 PHN/ULI:10013-5009

**View/Update Person**

**Name and Person Details:** [ edit... ]  
 Preferred Name: Mcdaniel, Flonce Iann  
 Gender: Female  
 Date of Birth: 1978-Jul-25  
 Added in Error: No  
 [ view all names... ]

**Address and Phone Numbers:** [ edit... ]  
 Residential/Mailing: 100a Chaparral Rd

**Eligibility:**  
 Current Eligibility Start Date: 2009-Jan-01  
 [ view eligibility... ]

**Additional Information:**

- [Alternate IDs](#)
- [Merge Potential Duplicates](#)
- [Registration Validation](#)
- [Residency](#)
- [Secondary ULIs](#)

- On the **View/Update Person** screen, click the **Alternate IDs** link to add an alternate ID or end an existing alternate ID

**Mcdaniel, Flonce Iann** Person Directory  
 Validated  
 PHN/ULI:10013-5009

**View/Update Alternate IDs**

Type	Alternate ID	End Date	End Reason

Back Add Alternate ID

- If there are any existing alternate IDs they will be listed on the View/Update Alternate IDs screen
- Click **Add Alternate ID**

**Mcdaniel, Flonce Iann** Person Directory  
 Validated  
 PHN/ULI:10013-5009

**Add Alternate ID**

Alternate ID Type: Manitoba Health Number \*  
 Alternate ID: 103759590 \*

Back Submit Cancel

5. Select the **Alternate ID Type** from the drop list
6. Enter the **Alternate ID** number  
The Alternate ID number must be valid and must pass an algorithm that checks the validation. Click the **Help** Button at the top of the screen for a list of the validation patterns.
7. Click **Submit**

Type	Alternate ID	End Date	End Reason
Manitoba Health Number	103759590		

Buttons: Back, Add Alternate ID

8. The **View/Update Alternate IDs** screen will be refreshed to show the new alternate ID

## End Alternate ID

1. **Search** for and **Select** the patient.

**Name and Person Details:** Preferred Name: Mcdaniel, Flonce Iann; Gender: Female; Date of Birth: 1978-Jul-25; Added in Error: No. [ [view all names...](#) ]

**Eligibility:** Current Eligibility Start Date: 2009-Jan-01. [ [view eligibility...](#) ]

**Address and Phone Numbers:** Residential/Mailing: 100a Chaparral Rd. [ [edit...](#) ]

**Additional Information:**

- [Alternate IDs](#) (highlighted)
- [Merge Potential Duplicates](#)
- [Registration Validation](#)
- [Residency](#)
- [Secondary ULIs](#)

- On the **View/Update Person** screen, click the **Alternate IDs** link to add an alternate ID or end an existing alternate ID

Mcdaniel, Flonce Iann Person Directory  
Validated  
PHN/ULI:10013-5009

**View/Update Alternate IDs**

Type	Alternate ID	End Date	End Reason
Manitoba Health Number	103759590		

Back Add Alternate ID

- Select the **Alternate ID** hyperlink to end the alternate ID

Mcdaniel, Flonce Iann Person Directory  
Validated  
PHN/ULI:10013-5009

**Update Alternate ID**

Alternate ID Type: Manitoba Health Number  
Alternate ID: 103759590  
End Date: 2012-Jan-01  
(YYYY-MMM-DD)  
End Reason: -- Select --

- Select --
- Added In Error
- Alberta Health Decision
- Alberta Health coverage
- Coverage in the other province ended
- Invalid out of province registration number
- New Version
- No Longer Resident of Alberta
- Now an Alberta Resident
- Number not registered for this person
- Stakeholder Request

- Enter the effective **End Date**
- Select an **End Reason** from the drop-down list
- Click **Submit**



**NOTE:** If the entry is added in error, do not enter an end date

Type	Alternate ID	End Date	End Reason
Manitoba Health Number	<a href="#">103759590</a>		Added In Error

Buttons: Back, Add Alternate ID

7. The **View/Update Alternate IDs** screen will be refreshed to show the End Date and End Reason for the alternate ID

## Registration Validation

1. **Search** for and **Select** the patient.

**Name and Person Details:** Preferred Name: Mcdaniel, Flonce Iann; Gender: Female; Date of Birth: 1978-Jul-25; Added in Error: No. [ [edit...](#) ] [ [view all names...](#) ]

**Address and Phone Numbers:** Residential/Mailing: 100a Chaparral Rd E, Calgary, Alberta. [ [edit...](#) ]

**Eligibility:** Current Eligibility Start Date: 2009-Jan-01. [ [view eligibility...](#) ]

**Additional Information:**

- [Alberta Personal Health Card Requests](#)
- [Alternate IDs](#)
- [Merge Potential Duplicates](#)
- **[Registration Validation](#)**
- [Residency](#)
- [Secondary ULIs](#)

2. On the **View/Update Person** screen, click the **Registration Validation** link to view the Registration Validation Information.

<b>Mcdaniel, Flonce Iann</b> 		<b>Person Directory</b>
Validated		
PHN/ULI:10013-5009		
<b>View Registration Validation</b>		
<b>Registration Validation Information:</b>		
Application Received Date:		
Identity Documentation:	Validated	
Identity Date:	2010-Jun-15	
Legal Entitlement Documentation:	Validated	
Legal Entitlement Date:	2010-Jun-15	
Alberta Residency Documentation:	Validated	
Alberta Residency Date:	2010-Jun-15	
<input type="button" value="Back"/>		

<b>View Registration Validation</b>		
<b>Registration Validation Information:</b>		
Application Received Date:		
Identity Documentation:	Existing	
Identity Date:	2007-Oct-09	
Legal Entitlement Documentation:	Existing	
Legal Entitlement Date:	2007-Oct-09	
Alberta Residency Documentation:	Existing	
Alberta Residency Date:	2007-Oct-09	

The View Registration Validation screen will display the status of the required documentation associated with an application and the date it was applied.

Documentation status' can be: Validated, Group or Existing.

This information indicates the status of the receipt of required documentation to complete registration for Alberta Health Care Insurance Plan coverage.

Refer to the *Application for Alberta Health Care Insurance Coverage* (Form AHC0102) for documentation requirements.



If any of the above information is inaccurate, you or the patient should contact Alberta Health Care Insurance Plan. To inquire about the account or update personal information, please quote the personal health number (except with email):




**Telephone:** 780-427-1432 (Edmonton)  
**Toll-free** in Alberta, dial 310-0000 then 780-427-1432.

**Fax:** 780-422-0102 (Edmonton)

**Mail:** Alberta Health  
Attention: Alberta Health Care Insurance Plan  
PO Box 1360, Station Main  
Edmonton, AB  
T5J 2N3

**In person:**

As of April 1, 2009, please use the [new registry agent locations](#). If you have questions, please contact Alberta Health Care Insurance Plan via telephone or email.

<b>Required Documentation</b>		
<p>In order to process your application for Alberta Health Care Insurance Plan coverage, you must include <b>photocopies</b> (<i>front and back, if applicable</i>) of documents proving your <b>1) Alberta residency</b>, <b>2) identity</b>, and <b>3) legal entitlement to be in Canada</b>. Some examples of acceptable documents are listed below. <b>If you do not submit the required documents, your application cannot be processed. Please do not send originals as we cannot guarantee their safe return.</b></p>		
 <p><b>Alberta residency</b></p> <p><b>** Must show name and current Alberta address, which must be the same as on the application.</b></p>	 <p><b>Government issued photo identification</b></p> <p><b>** Must be government issued ID which shows your photo, name and birthdate.</b></p>	 <p><b>Legal entitlement to be in Canada</b></p> <p><b>** Must be ID which shows your name and birthdate.</b></p>
<p><b>One of the following in either applicant's or spouse/partner's name.</b></p> <ul style="list-style-type: none"> <li>● Current Alberta driver's licence</li> <li>● Current Alberta registries ID Card</li> <li>● Current utility bills for an Alberta residence</li> </ul>	<p><b>&amp;</b></p> <ul style="list-style-type: none"> <li>● Canadian/Non-Canadian passport</li> <li>● Canadian citizenship card</li> <li>● Permanent resident card</li> <li>● Federal identification card</li> <li>● Current Alberta/provincial/territorial driver's licence</li> <li>● Nexus card</li> </ul>	<p><b>&amp;</b></p> <ul style="list-style-type: none"> <li>● Canadian passport</li> <li>● Canadian citizenship card</li> <li>● Canadian birth certificate</li> <li>● Permanent resident card</li> <li>● Canada entry document</li> <li>● Canadian baptismal certificate</li> </ul>

**Residency**

1. **Search** for and **Select** the patient.

**Smetany, Hoonjong Fracisco** Person Directory  
PHN/ULI:99986-1009

**View/Update Person**

**Name and Person Details:** [ edit... ]

Preferred Name: Smetany, Hoonjong Fracisco

Gender: Male

Date of Birth: 1940-Mar-13 (Validated)

Added in Error: No [ view all names... ]

**Address and Phone Numbers:** [ edit... ]

**Eligibility:**  
Current Eligibility Start Date: 1969-Jul-01 [ view eligibility... ]

**Additional Information:**

- [Alberta Personal Health Card Requests](#)
- [Alternate IDs](#)
- [Merge Potential Duplicates](#)
- [Registration Validation](#)
- **Residency**
- [Secondary ULIs](#)

2. On the **View/Update Person** screen, click the **Residency** link to View or Update Residency information

**Smetany, Hoonjong Fracisco** Person Directory  
PHN/ULI:99986-1009

**View/Update Residency**

**Arrival Information:**

Province/State of Origin: -- Select --

Country of Origin: -- Select --

Alberta Entry Date: (YYYY-MMM-DD)

Canada Entry Date: (YYYY-MMM-DD)

**Departure Information:**

Destination Province/State: British Columbia

Destination Country: Canada

Alberta Departure Date: 2012-aug-15 (YYYY-MMM-DD)

**Submit** **Cancel**

3. Enter the **Arrival Information** if required:
  - i. Enter the **Province / State of Origin**:
  - ii. **Country of Origin**:
  - iii. The **Alberta Entry Date**:
  - iv. The **Canada Entry Date**: If unknown, leave blank or enter the same date as the Alberta Entry Date.
4. Enter the **Departure Information** if required
  - i. **Destination Province / State**
  - ii. **Destination Country**:
  - iii. **Alberta Departure Date**:

5. Click **Submit**. Clicking **Cancel** will return you to the View/Update Person screen without saving any information.

**Note:** If there are shared addresses for this person, updating Departure Information cannot be done until the shared addresses are closed. If required, Navigate to the **View/Update Address** screen and Clear All shared addresses by clicking the **Clear All** Button in the Persons sharing this address field, and then **Submit**. Then, return to the **View/Update Residency** screen and update the Departure Information. Clicking 'Clear All' will not affect the addresses on the other records.

## Merge / Unmerge Request

### [Merge Request](#)

### [Unmerge Request](#)

## Merge Request

### Important Notes:

- In a merge, no patient information is changed and the affected records are linked in a relationship with one record remaining active and the other record being set to an inactive status. The inactive record can still be viewed but cannot be updated.
- A Merge Request is a request to the Provincial Registries Data Integrity Team within Alberta Health. They will investigate and determine if a merge is appropriate.
- In the confirmation email from Alberta Health, no reference is made to either patient so the PD user should take note if required.

1. **Search** for and **Select** the patient.

Smetany, Hoonjong Fracisco		Person Directory
PHN/ULI:99986-1009		
<b>View/Update Person</b>		
<b>Name and Person</b> [ <a href="#">edit...</a> ] <b>Details:</b> Preferred Name: Smetany, Hoonjong Fracisco Gender: Male Date of Birth: 1940-Mar-13 (Validated) Added in Error: No [ <a href="#">view all names...</a> ]	<b>Eligibility:</b> Current Eligibility Start Date: 1969-Jul-01 [ <a href="#">view eligibility...</a> ]	
<b>Address and Phone</b> [ <a href="#">edit...</a> ] Numbers:	<b>Additional Information:</b> <ul style="list-style-type: none"> <li>• <a href="#">Alberta Personal Health Card Requests</a></li> <li>• <a href="#">Alternate IDs</a></li> <li>• <b>Merge Potential Duplicates</b></li> <li>• <a href="#">Registration Validation</a></li> <li>• <a href="#">Residency</a></li> <li>• <a href="#">Secondary ULIs</a></li> </ul>	

- On the **View/Update Person** screen, click the **Merge Potential Duplicates** link

- Enter the Parent PHN or ULI if known and click **Find** or **search** for and **select** the parent. (See [Registering a Newborn, Step 2](#))

- Confirm that it is the correct person and click **Accept**. If the person displayed is not correct, click **New Search** or if there are too many results, click **Refine Search**. Clicking **Back** will return to the **Merge Potential Duplicates** screen

Smetany, Hoonjong Fracisco		Person Directory
PHN/ULI: 99986-1009		
<b>Compare Potential Duplicate Person</b>		
<b>First Person:</b>	<b>Second Person:</b>	
PHN/ULI: 99986-1009	PHN/ULI: 33896-7114	
Preferred Name: Smetany, Hoonjong Fracisco	Preferred Name: Smetany, Mr. Hoon	
Residential/Mailing: 198 Shannon Hill Sw Calgary, Alberta Canada T2Y 2Y8 <small>As of: 2003-May-26</small>	Residential/Mailing: 21 1/4 Millwoods Abbey E Edmonton, Alberta Canada T5J 3E4 <small>As of: 2012-Aug-09</small>	
Gender: Male	Gender: Male	
Date of Birth: 1940-Mar-13 (Validated)	Date of Birth: 1941-Mar-13	
Eligibility Start Date: 1969-Jul-01	Eligibility Start Date: Not Currently Eligible	
Alternate ID Type: Alternate ID:	Alternate ID Type: Alternate ID:	
Province/State of Origin: Country of Origin: Alberta Entry Date: Canada Entry Date:	Province/State of Origin: Country of Origin: Alberta Entry Date: Canada Entry Date:	
<a href="#">[ compare person names... ]</a> <a href="#">[ compare person addresses... ]</a> <a href="#">[ compare person eligibility history... ]</a> <a href="#">[ compare person alternate IDs... ]</a>		
<input type="button" value="Back"/>	<input type="button" value="Request Merge"/>	<input type="button" value="Cancel"/>

- The Compare Potential Duplicate Person screen will display the two records side by side on the same screen. The links **Compare Person...** located at the bottom of the screen will break down the information into smaller chunks. See screen shots below.
- Click **Request Merge** if records are to be merged. Click **Cancel** if the records should not be merged. Click **Back** to search for a different record.

#### Example of Compare Person Names

Compare Person Names		Person Directory
<b>First Person</b>	<b>Second Person</b>	
PHN/ULI: 99986-1009	PHN/ULI: 33896-7114	
Smetany, Hoonjong Fracisco	Smetany, Mr. Hoon	
<b>Corresponding Names</b>		
Preferred Name: Smetany, Hoonjong Fracisco	Preferred Name: Smetany, Mr. Hoon	
<b>Non-corresponding Names</b>		
<input type="button" value="Back"/>		

**Smetany, Hoonjong Fracisco**
Person Directory

PHN/ULI: 99986-1009

**Request Merge of Potential Duplicate Person**

First Person:	Second Person:
PHN/ULI: 99986-1009	PHN/ULI: 33896-7114
Preferred Name: Smetany, Hoonjong Fracisco	Preferred Name: Smetany, Mr. Hoon
Gender: Male	Gender: Male
Date of Birth: 1940-Mar-13	Date of Birth: 1941-Mar-13

You are about to request that the above records be merged.  
 Type in any relevant information about this update in the box below.

email address:

Click the 'Submit' button to request that Alberta Health merge these two records.

7. Enter any additional supporting information in the **text field**
8. Enter a contact **email address** for the ANP User requesting the merge if it is required to receive confirmation when the merge has been processed.
9. Click **Submit**. Click **Cancel** if the records should not be merged and be returned to the **View/Update Person** screen.

Smetany, Hoonjong Fracisco		Person Directory
PHN/ULI:99986-1009		
<b>View/Update Person</b>		
The merge request has been submitted to AH&W and the tracking number is WEL120000040084.		
<p><b>Name and Person Details:</b> [ <a href="#">edit...</a> ]</p> <p>Preferred Name: Smetany, Hoonjong Fracisco</p> <p>Gender: Male</p> <p>Date of Birth: 1940-Mar-13 (Validated)</p> <p>Added in Error: No [ <a href="#">view all names...</a> ]</p> <hr/> <p><b>Address and Phone Numbers:</b> [ <a href="#">edit...</a> ]</p> <p>Residential/Mailing: 198 Shannon Hill Sw Calgary, Alberta Canada T2Y 2Y8 As of: 2003-May-26</p> <p>Residential/Telephone: (403) 271-4566 As of: 2002-Oct-10</p> <p>[ <a href="#">view all addresses and phone numbers...</a> ]</p>	<p><b>Eligibility:</b> Current Eligibility Start Date: 1969-Jul-01 [ <a href="#">view eligibility...</a> ]</p> <hr/> <p><b>Additional Information:</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Alberta Personal Health Card Requests</a></li> <li>• <a href="#">Alternate IDs</a></li> <li>• <a href="#">Merge Potential Duplicates</a></li> <li>• <a href="#">Registration Validation</a></li> <li>• <a href="#">Residency</a></li> <li>• <a href="#">Secondary ULIs</a></li> </ul>	

10. A message will display stating that the request to merge the two records has been sent. If the User's email address was entered on the Request Merge of Potential Duplicate Person screen, the confirmation will be sent to the user referencing the tracking number displayed on this screen.

## Unmerge Request

### Important Notes:

- In an unmerge, no patient information is changed and the affected records are only split apart (e.g. two brothers, same last name, different Dates of Birth, sharing the same personal health number).
- An Unmerge Request is only a request to the Provincial Registries Data Integrity Team within Alberta Health. They will investigate and determine if an unmerge is appropriate.
- In the confirmation email from Alberta Health, no reference is made to either patient so the PD user should take note if required.

1. **Search** for and **Select** the patient.

2. Click on **Secondary ULIs**
3. The **View / Update Secondary ULIs** screen will display the secondary ULI(s) associated with the PD Person Record. Click on the **Name Hyperlink** for the Secondary ULI that is to be removed from the Patient.

**Kahmahkoostayo, Tierre Snow** Person Directory  
PHN/ULI:67359-7009

**Unmerge Primary/Secondary Persons**

Primary Person:	Secondary Person:
PHN/ULI: 67359-7009	PHN/ULI: 12894-5009
Preferred Name: Kahmahkoostayo, Tierre Snow Flower	Preferred Name: Arbour, Mei Na Kin Ling
<a href="#">[ compare person names... ]</a> <a href="#">[ compare person addresses... ]</a> <a href="#">[ compare person eligibility history... ]</a> <a href="#">[ compare person alternate IDs... ]</a>	

4. Click **Request Unmerge** from the **Unmerge Primary/Secondary Persons** screen

**Kahmahkoostayo, Tierre Snow** Person Directory  
PHN/ULI:67359-7009

**Unmerge Primary/Secondary Confirmation**

Primary Person:	Secondary Person:
PHN/ULI: 67359-7009	PHN/ULI: 12894-5009
Preferred Name: Kahmahkoostayo, Tierre Snow Flower	Preferred Name: Arbour, Mei Na Kin Ling
Gender: Female	Gender: Female
Date of Birth: 1993-Mar-06	Date of Birth: 1993-Mar-06

You are about to request that the above records be unmerged.  
Type in any relevant information about this update in the box below.

email address:

Click the 'Submit' button to request that Alberta Health unmerge these two records.

5. Enter any additional supporting information in the **text field**



6. Enter a contact **email address** for the ANP User requesting the unmerge if it is required to receive confirmation when the request has been processed.
7. Click **Submit** to send the Unmerge request. Click **Cancel** if the records should not be unmerged and be returned to the **View/Update Person** screen.
8. A message will display stating that the request to unmerge the two records has been sent. If the User's email address was entered on the **Unmerge Primary/Secondary Persons** screen, the confirmation will be sent to the user referencing the tracking number displayed on this screen.

### Updating a person's eligibility

- [Updating a person's registration type status – This person is a resident of Alberta requesting AHCIP](#)
- [Updating a person's registration type status – This person is a resident of Alberta requesting AHCIP and is homeless and/ or No Fixed Address](#)
- [Updating a person's registration type status – This person is a visitor to Alberta](#)
- [Updating a person's registration type status – This person is a Federally Insured person](#)

### Updating a person's registration type status – Requesting Alberta Health Care Insurance Plan (AHCIP)

**NOTE:** the person requesting AHCIP must have a valid address on their record. An AHCIP application will not be sent if the address is flagged 'BAD'.

1. **Search** for and **Select** the patient.

**Jouini, Tarma Louisma** Person Directory

PHN/ULI: 10005-5009

**View/Update Person**

**This person does not currently have Alberta Health Care Insurance Plan coverage.**

Please choose one of the following before updating this person's information:

- **This person is a resident of Alberta requesting AHCIP coverage**
- [This person is a visitor to Alberta](#)
- [This person is a Federally Insured person \(Canadian Forces, Federal Inmate, Federally Insured Refugees\)](#)

Name and Person [ [edit...](#) ] | Eligibility: Not Currently

Details:

2. On the **View/Update Person** screen, click on **This person is a resident of Alberta requesting AHCIP coverage**

**Jouini, Tarma Louisma**
Person Directory

PHN/ULI: 10005-5009

**Update Alberta Resident**

Registration Date:  \*

Preferred Name: Jouini, Mrs Tarma Louisma  
 Gender: Female  
 Date of Birth: 1942-Jun-26

Province/State of Origin:  ▾  
 Country of Origin:  ▾

Alberta Entry Date:   
(YYYY-MMM-DD)  
 (Leave blank if province of origin is Alberta)

Canada Entry Date:   
(YYYY-MMM-DD)  
 (Leave blank if country of origin is Canada)

---

**Address and Phone Number:**

Homeless and/or No Fixed Address  
[update residential mailing address](#)

Residential/Mailing: Box 301 gen Del  
 Hobbema, Alberta  
 Canada  
 T0C 1N0  
As of: 2006-Feb-18

Residential/Telephone: (403) 546-6880  
As of: 2009-Jan-28

3. The **Update Alberta Resident** screen is displayed.
4. Complete or update the Alberta Resident information.
5. Click **Submit**
6. The PD record has been updated.

### Updating a person's registration type status – Requesting Alberta Health Care Insurance Plan (AHCIIP) and updating Alberta Resident Status to Homeless and/ or No Fixed Address

1. **Search** for and **Select** the patient.

<b>Hirsch, Maria Sosa</b>		Person Directory
PHN/ULI: 10001-9009		
<b>View/Update Person</b>		
<p><b>This person does not currently have Alberta Health Care Insurance Plan coverage.</b></p> <p>Please choose one of the following before updating this person's information:</p> <ul style="list-style-type: none"> <li><a href="#">This person is a resident of Alberta requesting AHCIP coverage</a></li> <li><a href="#">This person is a visitor to Alberta</a></li> <li><a href="#">This person is a Federally Insured person (Canadian Forces, Federal Inmate, Federally Insured Refugees)</a></li> </ul>		
<p><b>Name and Person Details:</b></p>	<p>[ <a href="#">edit...</a> ]</p>	<p><b>Eligibility:</b>          Not Currently Eligible</p>

- On the **View/Update Person** screen, click on **This person is a resident of Alberta requesting AHCIP coverage**



**NOTE:** These links display for persons who have registered more than 60 days ago and are not currently eligible for the Alberta Health Care Insurance Plan.

**This person does not currently have Alberta Health Care Insurance Plan coverage.**

Please choose one of the following before updating this person's information:

- [This person is a resident of Alberta requesting AHCIP coverage](#)
- [This person is a visitor to Alberta](#)
- [This person is a Federally Insured person \(Canadian Forces, Federal Inmate, Federally Insured Refugees\)](#)

**Hirsch, Maria Sosa**
Person Directory

PHN/ULI:10001-9009

**Update Alberta Resident**

Registration Date: \*

Preferred Name: Hirsch, Maria Sosa  
 Gender: Female  
 Date of Birth: 1970-Jul-19

Province/State of Origin:

Country of Origin:

Alberta Entry Date:   
(YYYY-MMM-DD)  
 (Leave blank if province of origin is Alberta)

Canada Entry Date:   
(YYYY-MMM-DD)  
 (Leave blank if country of origin is Canada)

---

**Address and Phone Number:**

Homeless and/or No Fixed Address  
[update residential mailing address](#)

Residential/Mailing: 11163 36a Ave Nw  
 Edmonton, Alberta  
 Canada  
 T6J 0E6  
As of: 2006-Oct-27

Residential/Telephone: (780) 288-6090  
As of: 2006-Oct-27

3. The **Update Alberta Resident screen** is displayed. Select the **Homeless and/or No Fixed Address** check box.
4. Click the **update residential mailing address** link. The **View/Update Address** screen will display.

**Hirsch, Maria Sosa**
Person Directory

PHN/ULI:10001-9009

**View/Update Address**

**Residential Mailing Address**

**Persons sharing this address:**  
*Select the persons that should also have their address updated.  
 (Date of birth is shown in brackets)*

Sosa Hirsch, Liliya (1978-Jun-02)  
 Sosa Hirsch, Davonte Abdulsalam (2002-Dec-01)  
 Sosa Hirsch, Nathanale Argo (2005-Sep-04)

Addressee:

Descriptive Note:

**Civic Mailing Address:**

*Extra Address Information*

Number (e.g. 11)    Suffix    Name (e.g. Millwoods)    Type    Direction


---

Effective Date:  (YYYY-MMM-DD)

**Bad Address**

Go to Add/Update Residential Phone Number

5. Select the **Bad Address** Check box. This needs to be selected before a record can be changed to homeless and/or no fixed address.
6. Click **Submit**. The **Update Alberta Resident** screen will display.



**NOTE:** If there are multiple persons sharing the same address, a warning message will appear. If they will also be sharing the 'no fixed address' change then leave the names selected and click **submit**.

If the additional people will be maintaining the address and only the patient being modified is of no fixed address, then click the **Clear All** button and then click **Submit**.

**View/Update Address**

Associated Addresses Will be UPDATED

**Residential Mailing Address**

**Persons sharing this address:**  
*Select the persons that should also have their address updated.  
 (Date of birth is shown in brackets)*

**Hirsch, Maria Sosa**
Person Directory

PHN/ULI:10001-9009

**Update Alberta Resident**

Registration Date: \*

Preferred Name: Hirsch, Maria Sosa  
 Gender: Female  
 Date of Birth: 1970-Jul-19

Province/State of Origin:

Country of Origin:

Alberta Entry Date:   
(YYYY-MMM-DD)  
 (Leave blank if province of origin is Alberta)

Canada Entry Date:   
(YYYY-MMM-DD)  
 (Leave blank if country of origin is Canada)

---

**Address and Phone Number:**

Homeless and/or No Fixed Address

[update residential mailing address](#)

Residential/Mailing: **ⓈBad Address**  
 11163 36a Ave Nw  
 Edmonton, Alberta  
 Canada  
 T6J 0E6  
As of: 2012-Aug-10

Residential/Telephone: (780) 288-6090  
As of: 2006-Oct-27

7. Select the **Homeless and/or No Fixed Address** check box
8. click **Submit**

<b>Hirsch, Maria Sosa</b>		<b>Person Directory</b>
PHN/ULI:10001-9009		
<b>View/Update Person</b>		
<p>The person has no fixed address and does not have a partial residential address. Click <a href="#">here</a> to add a partial residential address.</p>		
<p><b>Name and Person Details:</b> [ <a href="#">edit...</a> ]</p> <p>Preferred Name: Hirsch, Maria Sosa</p> <p>Gender: Female</p> <p>Date of Birth: 1970-Jul-19</p> <p>Added in Error: No</p> <p>[ <a href="#">view all names...</a> ]</p>	<p><b>Eligibility:</b></p> <p>Not Currently Eligible</p> <p>[ <a href="#">view eligibility...</a> ]</p>	<p><b>Additional Information:</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Alberta Personal Health Card Requests</a></li> <li>• <a href="#">Alternate IDs</a></li> <li>• <a href="#">Merge Potential Duplicates</a></li> <li>• <a href="#">Registration Validation</a></li> <li>• <a href="#">Residency</a></li> <li>• <a href="#">Secondary ULIs</a></li> </ul>
<p><b>Address and Phone Numbers:</b> [ <a href="#">edit...</a> ]</p> <p>Residential/Mailing: <b>@Bad Address</b></p> <p>11163 36a Ave  Nw  Edmonton,  Alberta  Canada  T6J 0E6</p> <p><small>As of: 2012-Aug-10</small></p>		

- The **View / Update Person** screen will display a message that the person does not have a partial residential address. Click the **here** hyperlink to enter a partial address for the patient (e.g. the city they reside / obtain services in)

Hirsch, Maria Sosa

Person Directory

PHN/ULI: 10001-9009

### Add Address

Partial:

Addressee:   
 Descriptive Note:

**Civic Mailing Address:**

*Extra Address Information*

<input style="width: 100%;" type="text"/>	--Select--	<input style="width: 100%;" type="text"/>	--Select--	--Select--	
Number	Suffix	Name (e.g. Millwoods)	Type	Direction	

*Unit Type*      *Unit Number (e.g. 10)*

*City*      *Province/State*

*Country*

*Postal/Zip Code*

10. Click the **Partial** check box
11. Enter any **address information** available.
12. Click **Submit**



**Hirsch, Maria Sosa**
Person Directory

PHN/ULI: 10001-9009

**View/Update Addresses and Phone Numbers**

Addresses	<a href="#">add address</a>   <a href="#">add physical address</a>	Phone Numbers	<a href="#">add phone number</a>
Partial Residential/Mailing: Lethbridge, Alberta Canada <small>As of: 2012-Aug-10</small>	<a href="#">edit</a>   <a href="#">history</a>	Residential/Telephone: (780) 288-6090 <small>As of: 2006-Oct-27</small>	<a href="#">edit</a>
Residential/Mailing: @Bad Address 11163 36a Ave Nw Edmonton, Alberta Canada T6J 0E6 <small>As of: 2012-Aug-10</small>	<a href="#">edit</a>   <a href="#">history</a>		

[Back](#)

13. The **View/Update Address and Phone Numbers** screen has been updated with the new partial address and noting that the Residential / Mailing address is not valid.
14. Click **Back** to return to the **View / Update Person** screen.

### Updating a person's registration type status – This person is a visitor to Alberta

1. **Search** for and **Select** the patient.

Schottsneider, Han-Pu Tina Nicole PHN/ULI:10002-8009		Person Directory
<b>View/Update Person</b>		
<p><b>This person does not currently have Alberta Health Care Insurance Plan coverage.</b></p> <p>Please choose one of the following before updating this person's information:</p> <ul style="list-style-type: none"> <li><a href="#">This person is a resident of Alberta requesting AHCIP coverage</a></li> <li><b><a href="#">This person is a visitor to Alberta</a></b></li> <li><a href="#">This person is a Federally Insured person (Canadian Forces, Federal Inmate, Federally Insured Refugees)</a></li> </ul>		
<p><b>Name and Person Details:</b></p> <p>Preferred Name: Schottsneider, Han-Pu Tina Nicole</p> <p>Gender: Female</p> <p>[ <a href="#">edit...</a> ]</p>	<p><b>Eligibility:</b></p> <p>Not Currently Eligible</p> <p>[ <a href="#">view eligibility...</a> ]</p>	<p><b>Additional Information:</b></p>

- On the **View/Update Person** screen, select the hyperlink **This Person is a visitor to Alberta**. The Update Visitor screen will appear.



**NOTE:** These links display for persons who have registered more than 60 days ago and are not currently eligible for the Alberta Health Care Insurance Plan.

**This person does not currently have Alberta Health Care Insurance Plan coverage.**

Please choose one of the following before updating this person's information:

- [This person is a resident of Alberta requesting AHCIP coverage](#)
- [This person is a visitor to Alberta](#)
- [This person is a Federally Insured person \(Canadian Forces, Federal Inmate, Federally Insured Refugees\)](#)

3. Select from the radio buttons the option that best describes the patient:
  - i. **Visiting from within Canada**: Click the **Add New Alternate ID** Hyperlink
  - ii. **Visiting from outside Canada**: Enter the **Country of Origin** and **Date of Entry into Canada**.
4. Click **Submit**

5. Click **View eligibility** to see the Eligibility information for the patient that you just edited

**Schottsneider, Han-Pu**  
**Tina Nicole**  
PHN/ULI:10002-8009

Person Directory

**View Eligibility**

**Eligibility Information:**  
Not Currently Eligible

**Registration Type:**  
Registration Type: Visitor to Alberta from outside Canada  
Registration Date: 2012-Aug-10

**Eligibility History:**

Coverage From Date	Coverage To Date	Coverage End Reason

Back

6. The View eligibility screen will document the patient's current eligibility for AHCIP.

## Updating a person's registration type status – This person is a Federally Insured person

1. **Search** for and **Select** the patient.

**Edmunds-  
Leonhardt, Zhindra Jess**  
PHN/ULI:10003-7009

Person Directory

**View/Update Person**

**This person does not currently have Alberta Health Care Insurance Plan coverage.**

Please choose one of the following before updating this person's information:

- [This person is a resident of Alberta requesting AHCIP coverage](#)
- [This person is a visitor to Alberta](#)
- [This person is a Federally Insured person \(Canadian Forces, Federal Inmate, Federally Insured Refugees\)](#)

**Name and Person Details:** [ [edit...](#) ]

Preferred Name: Edmunds-  
Leonhardt, Zhindra  
Jess

**Eligibility:**  
Not Currently Eligible [ [view eligibility...](#) ]

**Additional Information:**  
[Alberta Personal Health Card Requests](#)

- On the **View/Update Person** screen, select the hyperlink **This Person is a Federally Insured person**. The View / Update Person screen will refresh.



**NOTE:** These links display for persons who have registered more than 60 days ago and are not currently eligible for the Alberta Health Care Insurance Plan.

**This person does not currently have Alberta Health Care Insurance Plan coverage.**

Please choose one of the following before updating this person's information:

- [This person is a resident of Alberta requesting AHCIP coverage](#)
- [This person is a visitor to Alberta](#)
- [This person is a Federally Insured person \(Canadian Forces, Federal Inmate, Federally Insured Refugees\)](#)

Edmunds- Leonhardt, Zhindra Jess		Person Directory
PHN/ULI: 10003-7009		
<b>View/Update Person</b>		
<p><b>Name and Person Details:</b> [ <a href="#">edit...</a> ]</p> <p>Preferred Name: Edmunds- Leonhardt, Zhindra Jess</p> <p>Gender: Female</p> <p>Date of Birth: 2006-Apr-24</p> <p>Added in Error: No</p>	<p><b>Eligibility:</b> Not Currently Eligible</p> <p>[ <a href="#">view eligibility...</a> ]</p>	<p><b>Additional Information:</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Alberta Personal Health Card Requests</a></li> <li>• <a href="#">Alternate IDs</a></li> <li>• <a href="#">Merge Potential Duplicates</a></li> </ul>

- Click **View eligibility** to see the Eligibility information for the patient that you just edited

Edmunds- Leonhardt, Zhindra	Person Directory						
PHN/ULI: 10003-7009							
<b>View Eligibility</b>							
<p><b>Eligibility Information:</b> Not Currently Eligible</p> <p><b>Registration Type:</b> Registration Type: Federally Insured Registration Date: 2012-Aug-13</p> <p><b>Eligibility History:</b></p> <table border="1"> <thead> <tr> <th>Coverage From Date</th> <th>Coverage To Date</th> <th>Coverage End Reason</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table>		Coverage From Date	Coverage To Date	Coverage End Reason			
Coverage From Date	Coverage To Date	Coverage End Reason					





- The View eligibility screen will document when the patient's current eligibility for AHCIIP.



Clicking the PD **Back** buttons will return you to the previous page to make corrections. Clicking **Cancel** will return you to the PD Home Page and will not save any of the data entered on the patient's account you were creating

## Appendix

### PD Screen Symbols

Symbol	Definition
	<b>Added in Error.</b> A new record was mistakenly created for a non-person (such as Mickey Mouse). If a record was added and you note that the person already exists in PD, click <b>Merge Potential Duplicates</b> to submit a merge request to AH. Once a record is created in PD it cannot be deleted, but it can be “ended” by appending this symbol to alert others.
	<b>Deceased.</b> May include a “Validated” or “Notified” (not validated) reference next to the Date of Death.
	<b>Secondary ULI.</b> A merged record exists. This symbol signifies a link to the primary record in PD. Always use the primary record for viewing – click <b>Secondary ULIs</b> to view the secondary record if necessary.
	<b>Bad Address.</b> The address on file is incorrect.

### Glossary

Term	Definition
Access ID	See <b>User ID</b>
User Name	See <b>User ID</b>
Affiliate	According to the HIA, an affiliate includes: <ul style="list-style-type: none"> <li>▪ Employees of a custodian</li> <li>▪ Any person that performs a service for a custodian (agent, appointee, volunteer or student).</li> <li>▪ Health care providers who can admit/treat patients at hospitals and other health care practitioners with formal access to hospital resources.</li> </ul>
Alberta Health Care Insurance Plan (AHCIP)	
Authorized Health Care Providers	An individual who works at an authorized health care facility and requires access to the EHR for direct patient care. EHR access permissions are determined by the facility’s Custodian.

Term	Definition
Civic Mailing Address	Is an urban mailing address. E.g. does not have a P.O. box, Mail Bag number, or reside on a Rural / Range Road.
Custodian	According the HIA, a custodian includes: <ul style="list-style-type: none"> <li>▪ Hospital boards, nursing home operators, provincial health boards, etc.</li> <li>▪ Health services providers as designated in the regulations, named by health professional body (e.g., regulated members of the College of Physician and Surgeons of Alberta)</li> <li>▪ Licensed pharmacies</li> </ul>
Delivery Installation Address	Examples include those that have a P.O. box, Mail Bag number, or reside on a Rural / Range Road.
Electronic Health Record (EHR)	A clinical Health Information System that links community physicians, pharmacists, hospitals, home care and other authorized health care providers.
Health Information Act (HIA)	Establishes the rules that must be followed for the collection, use, disclosure and protection of health information. It assists custodians and affiliates apply and administer the Act.
Person Directory (PD)	The web-enabled application that delivers person-identifiable demographic and eligibility information to authorized health care providers.
Personal Health Number (PHN)	Identifier issued to Albertans who are eligible for basic coverage with the Alberta Health Care Insurance Plan. This number is the same as the ULI (if applicable).
Unique Lifetime Identifier (ULI)	Assigned to a health care patient by Alberta Health. This is the number changes to an Alberta PHN when they have Alberta Health Insurance Plan coverage.

## **Error Messages**

Error message when adding a dependant child and the **Date Placed in Care** is greater than 2 years from today.

When a Dependant Child is adopted, the **Date Placed in Care** is Mandatory. The date must be within 2 years of today's date. If the date is unknown, the registration date can be entered.



Person Directory

**Add Dependant Child**

A date placed in care is required for an adopted child - date must be within two years of today's date. [DPHI\_003466]

Error message when the **Name Change Reason** for changing a person's name has not been selected,

Person Directory

**Sosa Hirsch, Maria**  
 PHN/ULI:10001-9009

**Update Preferred Name and Person Details**

METHOD UPDT CANNOT BE SPECIFIED WITH WHEN NAM\_CHG\_RSN\_CD IS BLANK

**Preferred Name**

Title: -- Select --

Last Name: Hirsch \*

First Name: Maria \*

Middle Name:

Suffix: -- Select --

**Name Change Reason:** [ ]

Gender: Female

Error message when trying to put an **End Date** to an alternate ID that is before the AHCIP effective date.

**Mcdaniel, Flonce Iann** Person Directory  
 Validated  
 PHN/ULI:10013-5009

**Update Alternate ID**

Alternate identifier end date should not be before alternate identifier effective date. [DPHI\_002476]

Alternate ID Type: Manitoba Health Number  
 Alternate ID: 103759590  
 End Date: 2012-Jan-01  
(YYYY-MMM-DD)  
 End Reason: Alberta Health coverage

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Error message when selection the **End Reason: Added In Error** and an **End Date** is entered.

Do not enter an **End Date** when entering an **End Reason: Added in Error**.

**Mcdaniel, Flonce Iann** Person Directory  
 Validated  
 PHN/ULI:10013-5009

**Update Alternate ID**

Alternate identifier expiry date should not be specified if end reason is 'Added In Error'. [DPHI\_002479]

Alternate ID Type: Manitoba Health Number  
 Alternate ID: 103759590  
 End Date: 2012-Jan-01  
(YYYY-MMM-DD)  
 End Reason: Added In Error

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**THE PD INITIATIVE IS A PARTNERSHIP BETWEEN  
ALBERTA HEALTH & ALBERTA HEALTH SERVICES**

