Patient Demographics

Overview

When a clinic is connected to Alberta Netcare through Community Information Integration (CII), patient identity needs to be validated before encounter, consult, or panel information can flow between systems. CII and the Central Patient Attachment Registry (CPAR) verify patient demographics against the Provincial Client Registry, which relies on healthcare insurance plan data collected through Person Directory.

The Provincial Client Registry (PCR) is an Alberta Health (AH) identity management application used to manage client demographics for the Ministry, Electronic Medical Records (EMR) and pharmacy community stakeholders.

PCR provides a central repository of demographic information for all clients that have encountered the health system. It is also a repository for the ministry's personal identifiable data attributes for insured residents and uninsured persons that have encountered the health system.

The demographic data that must match between the EMR to PCR are:

- Patient last name
- Patient first name
- Patient ID (ULI)
- Date of birth
- Gender

If the demographic information does not match, a patient's encounter or consult report will **not** flow into Alberta Netcare. It is also important for CPAR users to note that patients who are not uploaded to their provider's CPAR panel due to demographic mismatch will not have eNotifications flow back to their record. Users of CPAR receive feedback in the form of demographic

CII and CPAR match against the legal name as registered with the Alberta Health Care Insurance Plan (AHCIP).

For billing purposes, the matching is not as stringent. A clinic may have billed for a patient visit where the corresponding encounter or consult report will not flow to CII.

Information that can be challenging to keep up to date such as address and phone numbers are not used to match for CII and CPAR.

mismatch reports but submitters of encounters or consult reports do not. If a clinic submitting consult reports and encounters has errors, they will receive an e-mail communication from the CII Operations Team at Alberta Health; they run reports monthly to identify consults and encounter that do not submit due to demographic mismatches. Once a correction to the demographics is made, the consult or encounter information to flow to Alberta Netcare.

What source of truth is there for patient demographics?

Person Directory (PD) is considered the source of truth for Alberta Health Care Insurance Plan coverage and authorized users can view patient demographic information for comparison to the clinic EMR.

Community access to Person Directory is managed via Alberta Netcare. A user must configure their Alberta Netcare home page to open the application. This Quick Reference explains how to configure the Alberta Netcare homepage for PD access.

A best practice to keep patient demographics up to date in your clinic EMR is to validate against PD when checking in a patient for a clinic visit or booking a virtual visit.

If any mismatch is found, then either correct the EMR, when applicable, or instruct the patient on how to register a demographic change with Alberta Health.

Is Alberta Netcare or Connect Care the source of truth for patient demographics? No, please use Person Directory.

When a patient needs to update their patient information on their Alberta Health Care Card, the patient needs to complete a 'Notice of Change' form. This is a useful handout you can print at the clinic to provide instructions to patients on changing their information with Alberta Health.

Other notable facts about demographics
- Ensure the name field for the patient contains the legal name instead of a nickname or a preferred name (e.g., Kimberly instead of Kim, Ravinder instead of Ravi)
  - EMRs have a separate field for capturing a preferred name or nickname that does NOT communicate with CII/CPAR
- It is very rare, but a patient may have a blank first name, last name or may have a birthdate that is only year or only month and year as their legal name with the AHCIP

- Genders that match to PCR are female, male, other and X
  - Most EMRs just have female and male as genders, though Healthquest has *Other* as well as *X* and Med Access has *Other*
- Because the EMR gender needs to match the gender in Person Directory for information to submit to CII and/or CPAR, a clinic can use a pop-up or other feature in the EMR to note gender for a patient undergoing a transition or another demographic note field to record gender identity until the patient changes their gender on their Alberta Health Care Card.
- Special characters that are accepted in patient demographics:
  - Period
  - Space
  - Hyphen
  - Apostrophe
  - Brackets
    - Note: Telus removes any asterisks used in demographics before loading the panel to CPAR.

More useful tools

Person Directory User Guide

Person Directory Quick Reference landing page

Person Directory Primary/Secondary ULI Quick Reference