# PRIME – Registration – Applicant Enrolment - Provisioner Prototype Session

## Prototype Delivered by

- PRIME Change management team

## Contents

The PRIME Prototype is a working model of what has been developed by the PRIME project team to date. This document will assist in demonstrating the progress to date but does not represent the complete solution and full functionality.

The following instructions will assist you in walking through the processes to gain a better understanding of PRIME and how it fits within your organizational processes.

Before you begin:
- Google Chrome
- Prototype is available for your use from October 1 – November 15, 2018
- The link to the prototype –
  https://maximus-prime-test.pathfinder.gov.bc.ca/
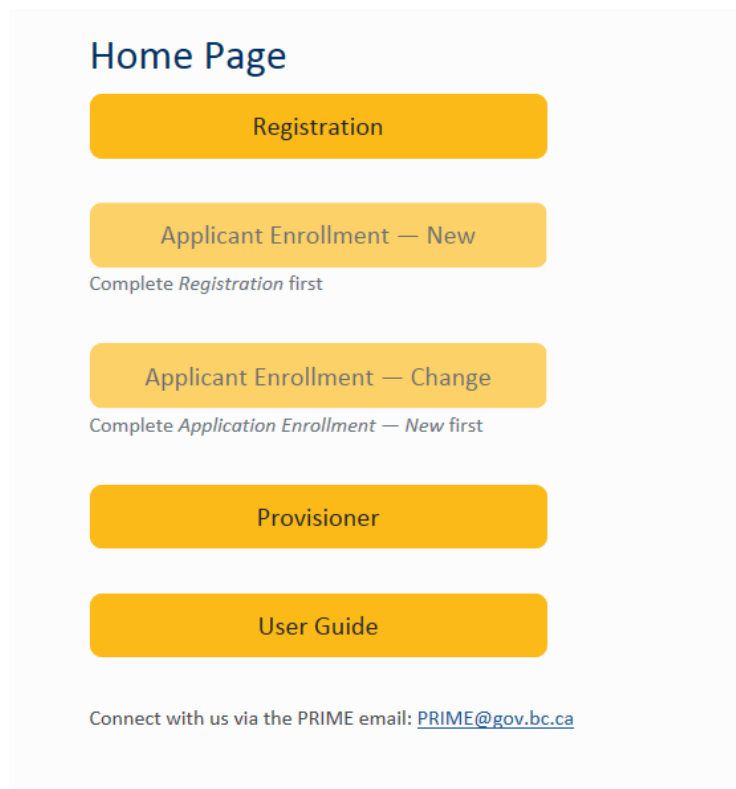
## 1   PRIME Overview

***PharmaNet Revisions for Information Management Enhancements*** (PRIME) is a user management solution for PharmaNet that will ensure that all PharmaNet access is secure transparent and accountable.
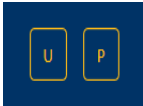
PRIME is being implemented in order to:
- Ensure that access to PharmaNet aligns with applicable, government standards and strategic direction
- Ensure individual accountability for access to PharmaNet
- Improve information regarding user access and PharmaNet use
- Increase the security and privacy of personal information in PharmaNet

## 2   PRIME Home Page

For the prototype the PRIME home page will display 5 Category bars that will link you to the indicated process or resource document

## 3    PRIME Visual Artifacts – What do the Icons represent

| WF Icons | Description |
|---|---|
|  | • Return to home page<br>• Logout |
|  | • Interactive help and tour<br>• Tooltip displayed above main features |
|  | • A link to a FAQ that displays user relative content about PRIME |
|  | • User is shown which PRIME screen is applicable based on which role is checked:, User/Applicant, Provisioner<br>• Once logged in, they can move from screen to screen |
|  | • Process links |
| PRIME@gov.bc.ca | • PRIME project – contact email |
|  | • Notification banner will |

# 4   Registration Process

PRIME is a secure system that requires users to login. In order to setup an account, each user will need to complete Registration; a process that involves setting up a multi-factor credential and confirming their identity.

1.      Multi-factor means the credential is stronger than the standard Username + Password (something you know); it requires something else that you have e.g. a BC Services Card or a phone to receive a text with a one-time code.

2.      Confirming an identity means proving you are who you say you are.  It will involve providing identity information and validation with an agent via video-chat.

Registration for PRIME also provides contact coordinates and security questions to aid in account recovery and confirms identity via a remote identity-proofing process consisting of a brief video chat with an authorized Identity Assurance Administrator, using an identity document. Additional options may include:
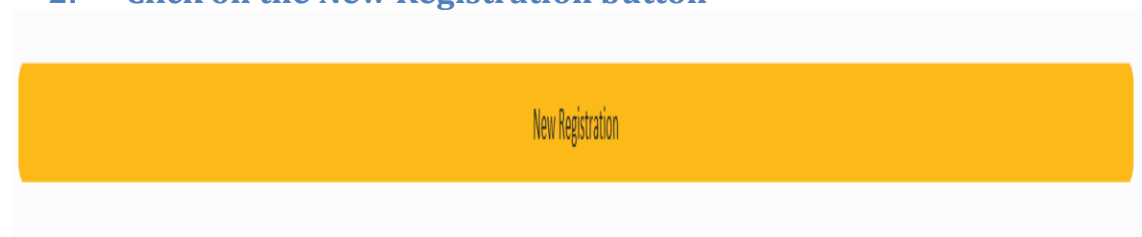   • SMS/Text ,
   • Physical token/fob
   • Secure Phone application

   1.    **Click on the Registration button**
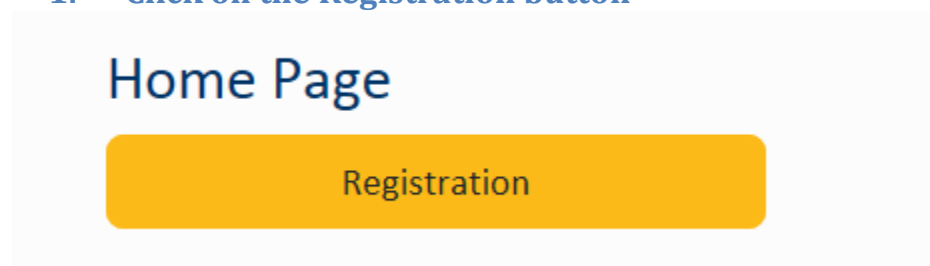


This will take you to the first page of the Registration process

   2.    **Click on the New Registration button**

### 3. Collection Notice Page

Clicking on the "I Agree" button on the collection notice will indicate the individual agrees to the collection of information for the purpose of the Registration process, and will move to the next step in the Registration Process on the Application Guidance page.

## Collection Notice

The PRIME application collects personal information for the purposes of verification to authorize your access to PharmaNet. Your personal information is collected by the Ministry of Health under section 26(c) of the Freedom of Information and Protection of Privacy Act. Should you have any questions about the collection of this personal information, please contact PRIME@gov.bc.ca.

Disagree    I Agree

### 4. Application Guidance Page

Registration can be completed using one of the following two methods:

1.      BC Services Card:
This method involves setting up your BC Services Card as your actual credential – you will use the card to authenticate and login to PRIME.
**To set this up, you will be required to pair your card with your phone or a card reader, and verify your identity with a Services Agent via video-chat.**
Once the card is setup, you will be prompted to complete some additional information including Contact and Security questions/responses.

2.      Ministry of Health credential:
This is an alternate process for those who do not have a BC Services Card (or prefer not to use it); you can create a credential consisting of a Username, Password, and a Multi-Factor method such as text message confirmation.
Information to support your identity (name, address, and picture of a valid **Government Issue Photo ID**) and verify your identity with an agent via video-chat is required. Setting up this type of credential requires a bit more data entry and is not as integrated as the BC Services Card credential. We recommend using the BC Services Card credential if at all possible.

## Application Guidance

There are two ways to obtain login credentials for PRIME. If you have a BC Services Card, register with your BC Services Card. Otherwise, register with the Ministry of Health

**BC Services Card**

If you have BC Services Card please start your registration process here.

**BCSC Register**

**BC Ministry of Health**

For standard registration please start your registration here.

**Register**

BC Services Card – the option recommended for BC Residents –

Click on the BCSC Register button to move the user to the next step in the Registration Process



**BC Services Card**

If you have BC Services Card please start your registration process here.

**BCSC Register**

BC Services Card Page – The page below is a copy of the BC Services Card Website page with all the information for using a BC Services Card

The user will be required to setup their BC Services Card using one of the options presented: (mobile card or via a card reader) and validate their identity via video-chat. **This process will not be demonstrated as part of the prototype.**

Once the card is setup, the user will be prompted to complete Contact and Security Information by Clicking on the continue button.

**NOTE:**  Addition of a Preferred Name is optional and is for those users who are commonly known by a name that differs from their identity documents
If the user chooses to add a preferred name the **first and last name fields are mandatory** to meet the criteria for a name search.

Contact Information is collected for communication with the individual regarding their account. Contact information fields are mandatory
Click on the continue button to move to the next step in the Registration Process

**Security Questions:**
You must select 3 security questions and provide the answer to each: If a PRIME user places a call for support, these security questions may be asked as an added security measure.



Once completed click the Submit button:



The dashboard will display all portions of your Registration as complete

You may now use your BC Services Card to Log into PRIME for the purposes of Enrolment

If you do not have a BCSC an alternate process is available.
Click on the BC Ministry of Health button to move to the next step in the Registration Process



**BC Ministry of Health**

For standard registration please start your registration here.

Register

**Registration Information Page**
The individual completes all fields indicated in Registration Information and Contact Information.

NOTE: The Registration Information must be entered as it appears on your Government Issue Photo Identification

NOTE:  Addition of a Preferred Name is optional and is for those users who are commonly known by a name that differs from their identity documents e.g. Shortened first name Robert > Bob

If an applicant chooses to add a preferred name **the first and last name fields are mandatory** to meet the criteria for a name search.



Adding a Preferred Name is an optional step

**Registration Information**

Last Name

Middle Name

First Name

Date of Birth
Please Select

Address

City

Province

Postal Code

Country

**Preferred Name (optional)**

Preferred Last Name

Preferred Middle Name

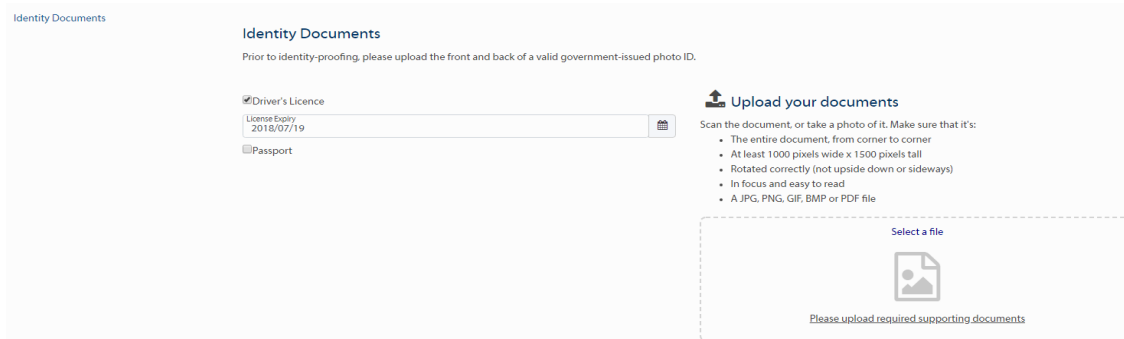Preferred First Name

**Contact Information**

Phone

Extension Number

Email

Click on the continue button to move to the next step in the Registration Process

Continue

## Identity Document

You will be asked to select the identification that you will use from the list displayed (not a complete list represented) and to provide the expiry date of the identification. This document will be validated during the upcoming video-chat to confirm you are who you say you are. (Comparison of your ID to the information you provided, and your image)

**Identity Documents**

**Identity Documents**

Prior to identity-proofing, please upload the front and back of a valid government-issued photo ID.

☑ Driver's Licence

License Expiry
2018/07/19 📅

☐ Passport

⬆ Upload your documents

Scan the document, or take a photo of it. Make sure that it's:
- The entire document, from corner to corner
- At least 1000 pixels wide x 1500 pixels tall
- Rotated correctly (not upside down or sideways)
- In focus and easy to read
- A JPG, PNG, GIF, BMP or PDF file

Select a file

Please upload required supporting documents

You are required to upload a copy of your identification

Click on Continue

**Continue**
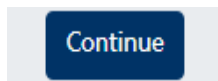
The next screen is for setting up your login in credential that includes:
Creating a PRIME User ID
Adding a Password/confirming that password
NOTE: Standard protocols for User ID and password will be applied in production but not in the prototype

Answering 3 security questions
Choosing a Multi-factor Authentication method e.g. Text/App
The Multi-factor Authentication adds an additional layer of security that ensures that password information has not been compromised

## Prime Account

**User ID**
SSecurity

**New Password**
••••••••

**Confirm Password**
••••••••

### Security Questions

**Security Question 1**
What is the name of your first pet?

**Security Question 1 Answer**
Pet

**Security Question 2**
What was the last name of your favourite teacher?

**Security Question 2 Answer**
Teacher

**Security Question 3**
What town was your mother born in?

**Security Question 3 Answer**
Town

### Multi-Factor Authentication Methods

Secondary Security (please select at least one)
☑ SMS/Text

**Phone**
(250)-555-1234

☐ Physical Security Key

Instructions to follow

## Multi-factor methods - Background

This is where you setup your second factor method that will prompted for to login to PRIME. Only one method is required, but you can setup multiple if you want.

Option #1: SMS/Text: This requires a mobile phone number that can receive text messages. When this method is setup and selected at login, you will be sent a one-time code via text message and be prompted to enter it in order to login.

Option #2: Physical Security Key: For those without access to a mobile phone, a physical security key can be setup and mailed to you for the purpose of logging into PRIME. This key generates a random number that must be entered to login. Identity Proofing can be completed without the key

Option #3: Mobile App Authentication: This requires you to download an app on your mobile device that will generate a code that must be entered to login.

**NOTE: Option 2 and 3 are not available for Prototype**

Click submit to move to the next step

The account has been created, and now the next step in the process will be identify proofing.

**Account Created Successfully**

User ID
SSecurity

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum laoreet. Proin gravida dolor sit amet lacus accumsan et viverra justo commodo. Proin sodales pulvinar sic tempor. Sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Nam fermentum, nulla luctus pharetra vulputate, felis tellus mollis orci, sed rhoncus pronin sapien nunc accuan eget.

**Complete Identity Proofing**

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum laoreet. Proin gravida dolor sit amet lacus accumsan et viverra justo commodo. Proin sodales pulvinar sic tempor. Sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Nam fermentum, nulla luctus pharetra vulputate, felis tellus mollis orci, sed rhoncus pronin sapien nunc accuan eget.

User ID
SSecurity

Password

[Login]

An applicant must log in to confirm the credential using the multi-factor method selected.

Enter your password and click Login

Select a method to verify yourself                    ✕

⦿ SMS/Text

Phone
**0-555-12***

◯ Physical Security Key

Instructions to follow

◯ Mobile App Authentication
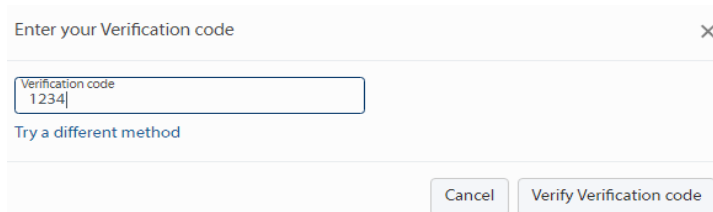
[Cancel]  [Send Verification code]

Select the preferred verification (multi-factor) method chosen and click on "Send Verification Code" (example will be SMS text) **NOTE: For the prototype no actual text will be sent**

You will receive your verification code via text message (as indicated)

Enter the Verification Code into the field indicated and click on Verify Verification Code
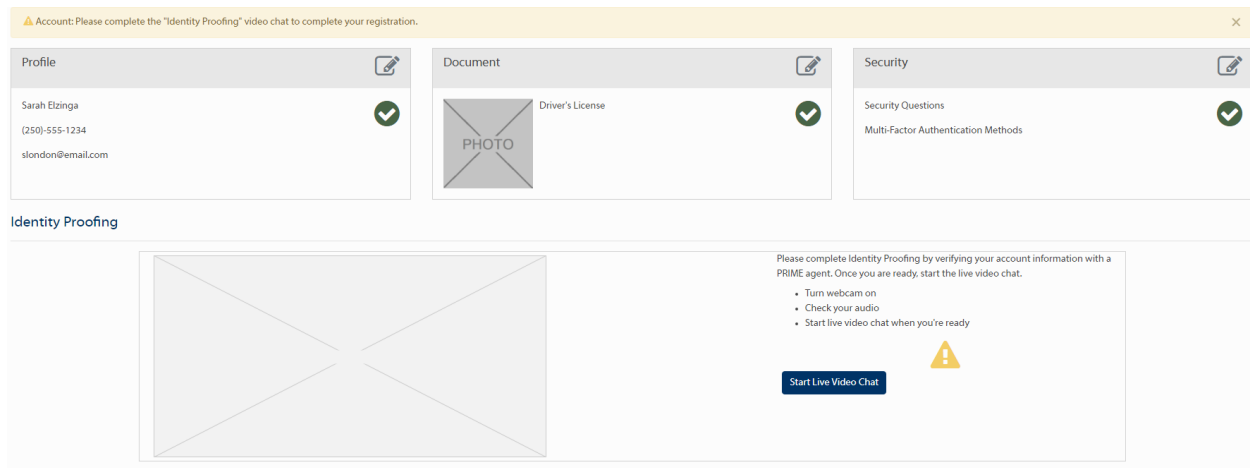


You will receive confirmation that the code has been verified (and that you are successfully logged in) – click on Identity Proofing to complete Registration

By clicking on the "Start Live Chat" button you will be redirected to a web session for identity proofing.  NOTE: There is no Live Chat for the Prototype

The dashboard will display all portions of your Registration as complete and you can use your Ministry of Health credential to log into PRIME

This is the last step of Registration and once complete, you can login to PRIME and complete Enrolment

**Enrolment Process**

All Individuals who require access to PharmaNet (Regulated and On-Behalf Of Users) will be granted access by the Ministry of Health based on the information provided in their application.
All individuals who wish to have continuous access to PharmaNet will be required to periodically confirm that the information collected at enrolment is still valid

Pre-condition: The applicant has completed the Registration Process and logged into PRIM E

**Click on the *Applicant Enrolment – New* button**
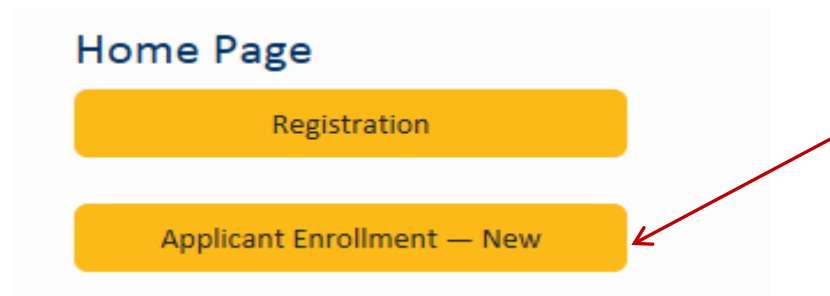


This will take you to the first page of the Enrolment process

**Display of Registration Information**

The page will display the information provided by the User at the time of Registration.

## Registration Information

This information is from your ID document or as provided at Registration. Your name as known by other people will be used to find you in PRIME. If you prefer to go by another name that was not provided at Registration, select "(optional) Set Preferred Name" and enter your preferred name in full. Otherwise, your legal name will be used to find you in PRIME.

**Legal Name**
smith smeith smith

**Date of Birth**

**Address**
1234

**City**
victoria

**Province**
bc

**Postal Code**
V8V 8V8

**Country**
canada

## Preferred Name (optional)

**Preferred Last Name**
smitty

**Preferred Middle Name**
smeith

**Preferred First Name**
smith

## Contact Information

**Phone Number**
(250)-555-5555

**Extension Number**

**Email**
ssmith@smith.com

## Mailing Address

Use the address from my Registration Information as my mailing address  [ Yes ] [ No ]

**Address**

**City**

**Province**

**Postal Code**

**Country**

PHOTO

The user has the option to update preferred name, contact info, and must provide their mailing address information. They can provide an alternate mailing address by clicking "No" to the question: "Use the mailing address from my Registration Information...." and completing the address fields

## Mailing Address

Use the address from my Registration Information as my mailing address  [ Yes ] [ No ]

**Address**

**City**

**Province**

**Postal Code**

**Country**

Click the Continue button to move to the next step in the process – Professional Information
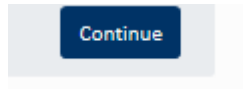


**Professional Information**

The Professional Information page will ask a series of questions related to the Users professional Information.  This information will be used to determine the Users PharmaNet access privileges



Professional Information

### Professional Information

Your professional information is used to assign you to a user class, which helps determine the PharmaNet access privileges you will receive.

Are you a regulated health care professional?

Yes   No

### Self Declaration Professional History

The information you provide here will determine whether or not a manual review is required. Upload any supporting documents as needed.

Have you ever been the subject of an order or a conviction for an information contravention?

Yes   No

Have you ever had your registration with a governing body of a health profession suspended or cancelled?

Yes   No

Have you ever had Limits and Conditions imposed on your licence as a result of disciplinary actions taken by the governing body of a Health Profession?

Yes   No

Have you ever had your access to PharmaNet suspended or revoked?

Yes   No

Click the Continue button to move to the next step in the process – Professional Information
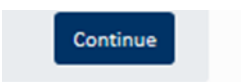


The Professional Information page will ask a series of questions related to the Users professional associations. This information will be used to determine the user's PharmaNet access privileges.

The applicant will declare their professional designation/role and any pertinent licensing information.
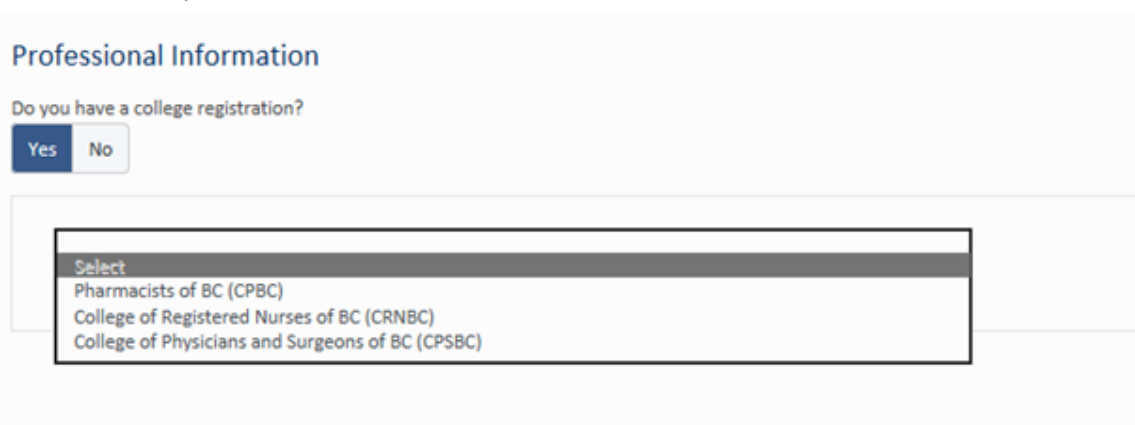
The applicant must complete the professional registration information as it applies to them.

**Regulated Health Care Professional:**

An applicant who is a regulated health care professional will click Yes
•        A drop down list of College Registrations is displayed
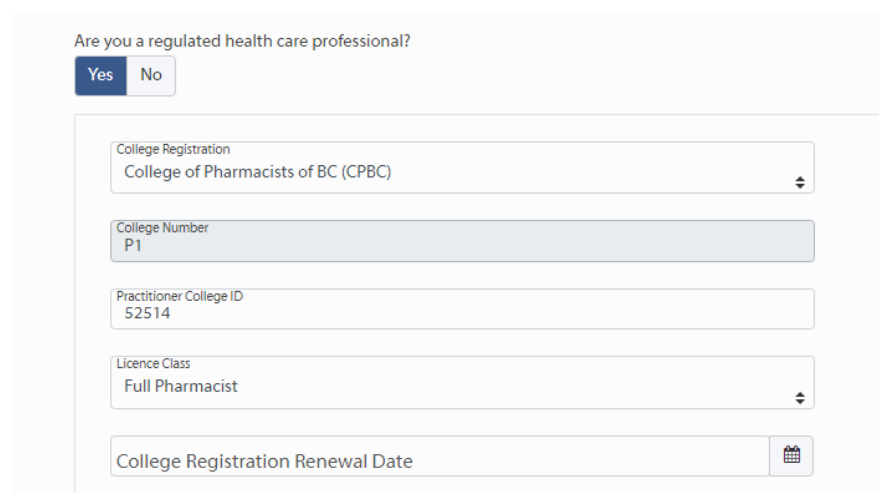
Applicant must select the applicable college registration from the dropdown list (not a finite list)



The college selected will display additional fields requiring completion

Complete all fields displayed
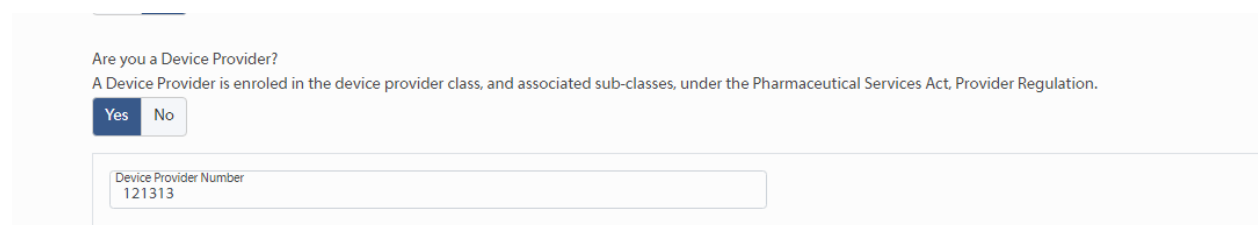
**NOTE**: More than one College Registration can be added.

**Device Provider**: if you are a Device Provider answer the Device Provider Question

**NOTE:** A pharmacist may also be a Device Provider and must add the information for both.

Click on Yes and add your Device Provider Number
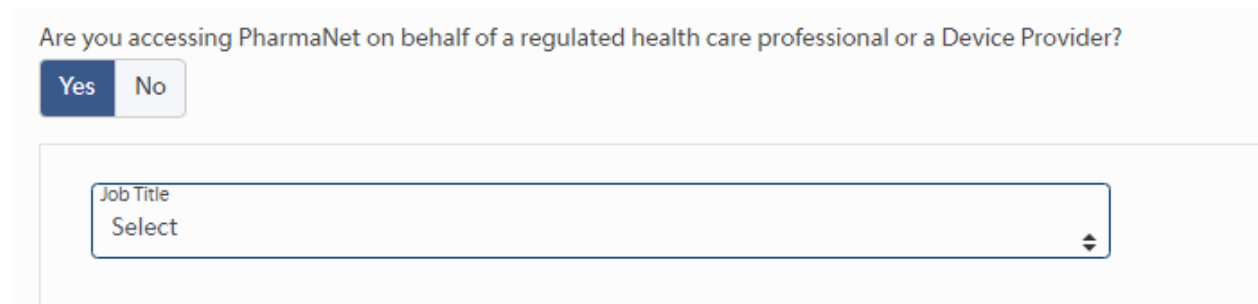
Are you a Device Provider?
A Device Provider is enroled in the device provider class, and associated sub-classes, under the Pharmaceutical Services Act, Provider Regulation.

Yes    No

Device Provider Number
121313
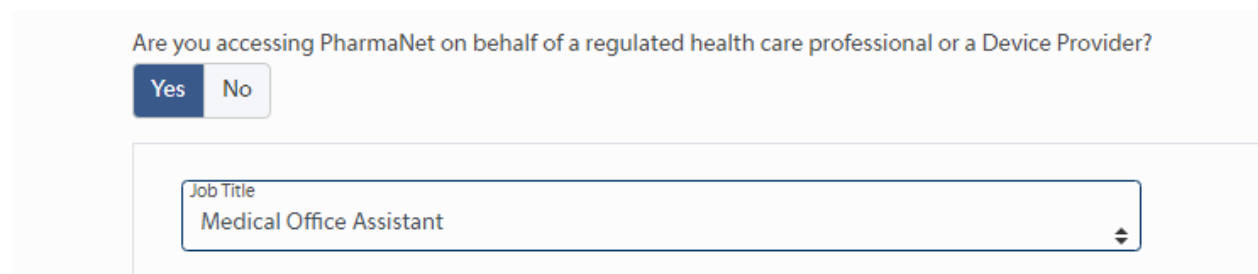
**On-Behalf-Of** – an On behalf of User must answer No to the Registered User and Device Provider Question

The following question will display – Select the category that applies to you in the dropdown list:

Are you accessing PharmaNet on behalf of a regulated health care professional or a Device Provider?

Yes    No

Job Title
Select

Are you accessing PharmaNet on behalf of a regulated health care professional or a Device Provider?

Yes    No

Job Title
Medical Office Assistant

## Professional History

The User must now answer each of the professional history questions. The information provided by the User may introduce the requirement to upload supporting documentation and a manual review by MoH may be required.

**NOTE:  No document upload will be in Prototype**



Click the continue button to proceed to the next step in the process - the PharmaNet Access - Organization



The Organization page will be displayed and the User must select one or more Organizations from which they access PharmaNet

NOTE: The setup of Organizations and associated Sites in PRIME will be coordinated with stakeholders from each Organization as an Operational readiness exercise

**To add an Organization,**
Click on *Add Organization*

A Search pop-up Window will display and the User can enter their search criteria

Find and add a Organizations                                               ✕

Organization Name                    Type (optional)
Fraser                               HA
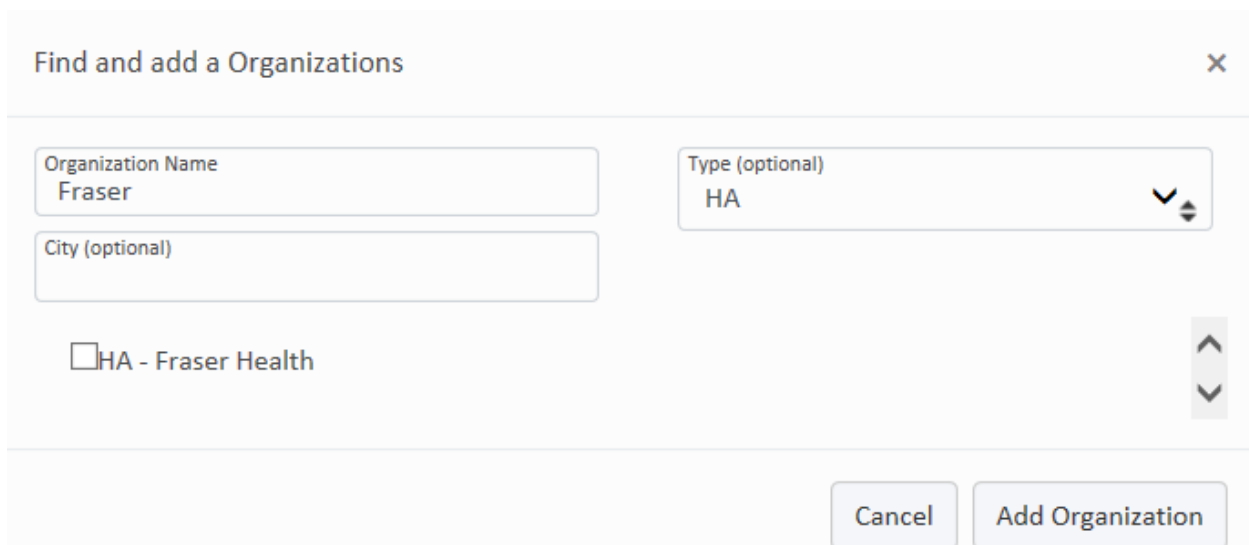
City (optional)


                                                        Find Organization


NOTE: Prototype is limited to Organization Name and Type


Click on **Find Organization**

Find and add a Organizations                                               ✕

Organization Name                    Type (optional)
Fraser                               HA

City (optional)


☐HA - Fraser Health                                                        ⌃
                                                                           ⌄
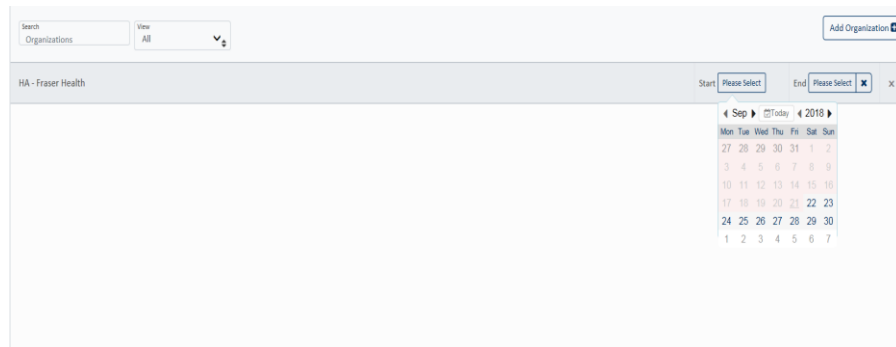

                                              Cancel    Add Organization


When the correct organization is displayed, select it, then – Click on the **Add Organization** button

The User will be prompted to add the "**start date**" and **"end date" (end date only if known)**
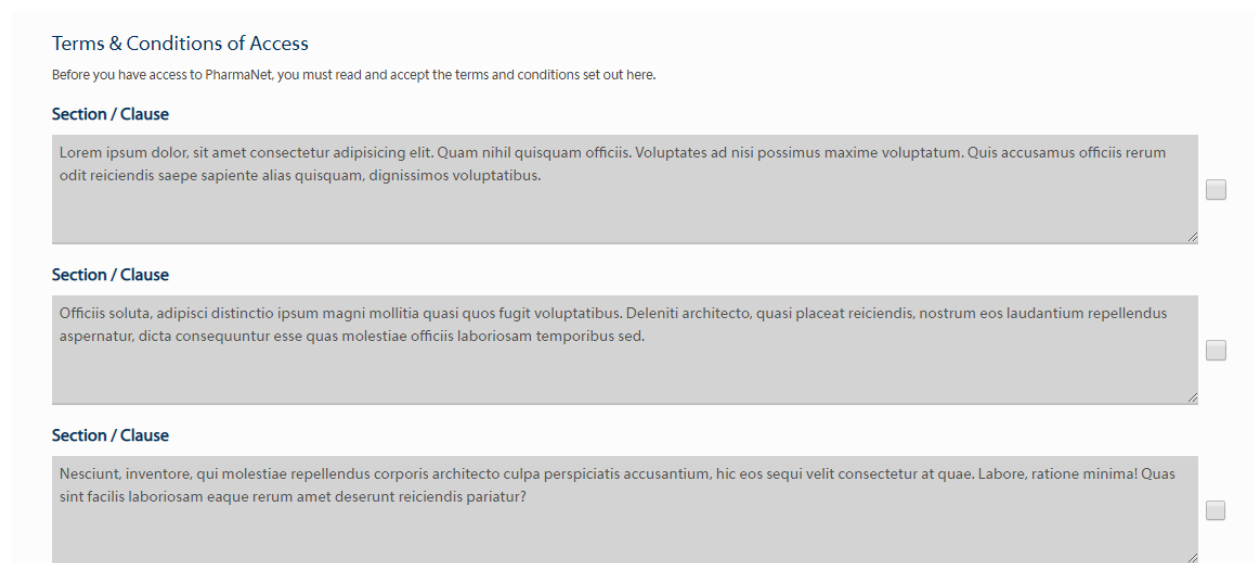

**NOTE**: For the purpose of the prototype:
 "**start date**"  Start date is today's date or a future date

*"end date"* Optional – and only if known e.g. short term assignment



Click the continue button to proceed to the next step in the process - the Terms and Conditions of Access Page

Click on each of the Terms and Conditions of Access Check boxes



Click on the Declaration Statement (**if not selected the Applicant cannot continue in the enrolment process**)

Click Continue the Review and Submit page will display the enrolment information supplied. The User will have the opportunity to make changes at this time or Submit if everything is correct.



Click Submit 

The following message will display:



At this point in the process the application will be reviewed by Ministry electronically or manually based on the information provided in the application.

**Applicant Enrollment – Change**

NOTE: Clicking on this link will allow the Applicant to:
1) Confirm their PharmaNet access
2) Make changes to their enrolment information

The User is notified by PRIME to log into PRIME to confirm the access provisioning and complete the Terms and Conditions of access as required.

Click on Applicant Enrolment - Change



Activities for action will be highlighted



## Click on the Edit Button in the PharmaNet Access Panel



The display will include what has been provisioned for the applicant:
- A list of the Organizations identified by the Applicant in their enrolment
- A list of the sites that the Provisioner has indicated the Applicant will need to access PharmaNet
- The POS ID, the start/end date
- The Personal Access question e.g. A Doctor will be required to enrol, but will have On-Behalf-of Users to access on their behalf.
- The User must confirm the information for each line item and accept or decline each site as indicated by the Provisioner

**Note:** Decline may be used when a site indicated may be incorrect. If selected the User will have no access from that specific site and the Provisioner will be notified.

- Clicking on Accept will update the status of each item to Active  - Once complete click on Continue

The Terms and Conditions page will display and the user must check each item



Click Continue and the Review and Submit page will display, allowing the user to edit or Submit

Click Submit and the following message will display:

## Provisioning Confirmed

Thank you for confirming the provisioning at the specific sites. You now have access to PharmaNet at those confirmed sites.

Ok

Click on Ok and the Dashboard will display all areas of enrolment complete and PharmaNet Access "Active"

| ⚠ System Notification: Server will be down for 2 hours maitenance at 14:30 PT. | ✕ |
|---|---|

| Contact Information | ✎ | Professional Information | ✎ |
|---|---|---|---|
| PHOTO  Bob Hunt  (250)-333-2323  dbdldl@email.com | ✓ | Job Title: Medical Office Assistant | ✓ |

| Terms & Conditions of Access | ✎ | PharmaNet Access | ✎ |
|---|---|---|---|
| Renewal Date: n/a | ✓ | 1 Organization  4 Sites  **Enrolment Active** | ✓ |
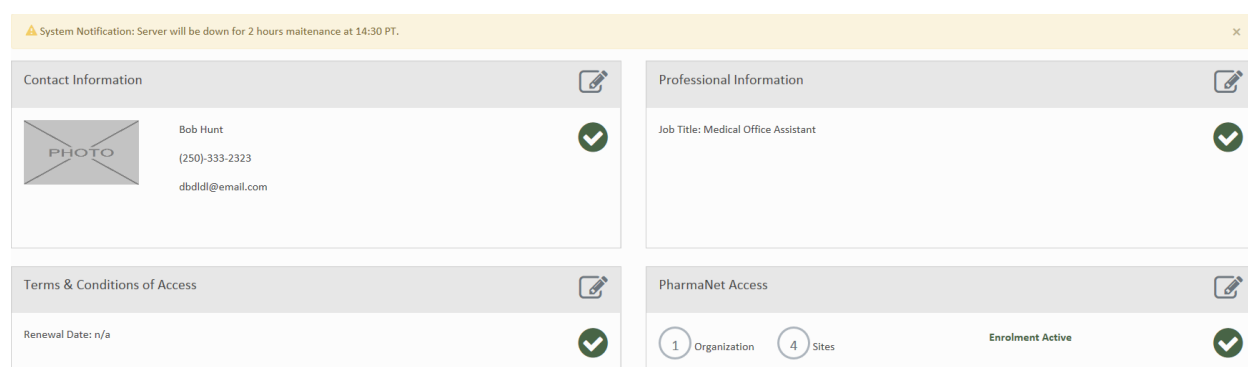
## Provisioning

The Provisioner is the authorized person(s) who sets up the applicant's PharmaNet access in the local point-of-service software.
The Provisioner identifies the Sites and the POS User ID in PRIME to link access to PharmaNet

## Provisioner - Home Page
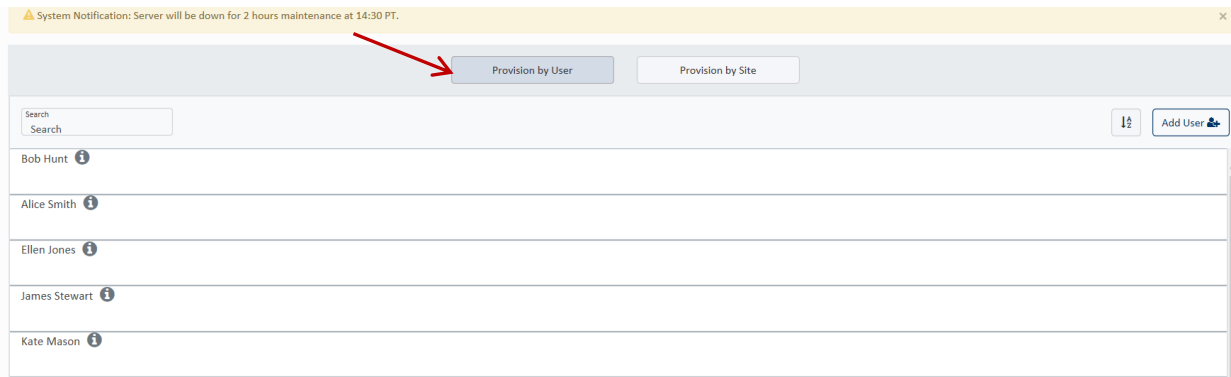
The Provisioner will be contacted by the Organization via email to Provision for applicants

The Provision Home Page provides the Provisioner with two Options
1)  Provision by User:  To provision access for an individual
2) Provision by site e.g. To Provision access for multiple individuals at a single site.

**Provision by User:**
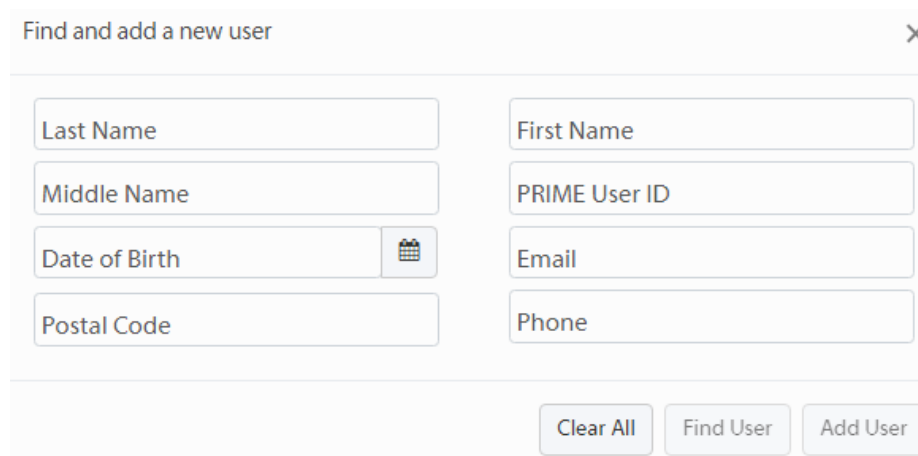
The Provisioner will see the list of Users who currently have PharmaNet access at the Sites they oversee.
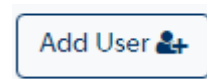




To Provision for a new user click on the Add User button

Search for the Individual using the information provided in the request e.g. Last Name, First Name, and DOB



**Note:** If a search returns more than one return, the system will prompt you to add additional fields to resolve a single return.

All fields must be completed in full – no partial entries e.g. first name: Bob rather Bo

The Provisioner will not be able to search users for Organizations they do not provision for.

Enter the information and press "Find User"



If the individual returned is the correct individual, select the check box and click on Add User



The individual is added to the Provisioner Home Page – as indicated:

Click on the Edit Icon to proceed to the next step 

The information the individual provided at enrolment and the Organizations the Provisioner is responsible for are displayed:



Click each organization to display the sites associated with that Organization:



The Provisioner records required information for each Site where the User is required to access PharmaNet .The Provisioner can enter both start and end dates. The end date is an optional e.g. short-term assignment

The POS User ID must be entered to link the POS system with PRIME

The question of Personal Access is answered from the drop down list
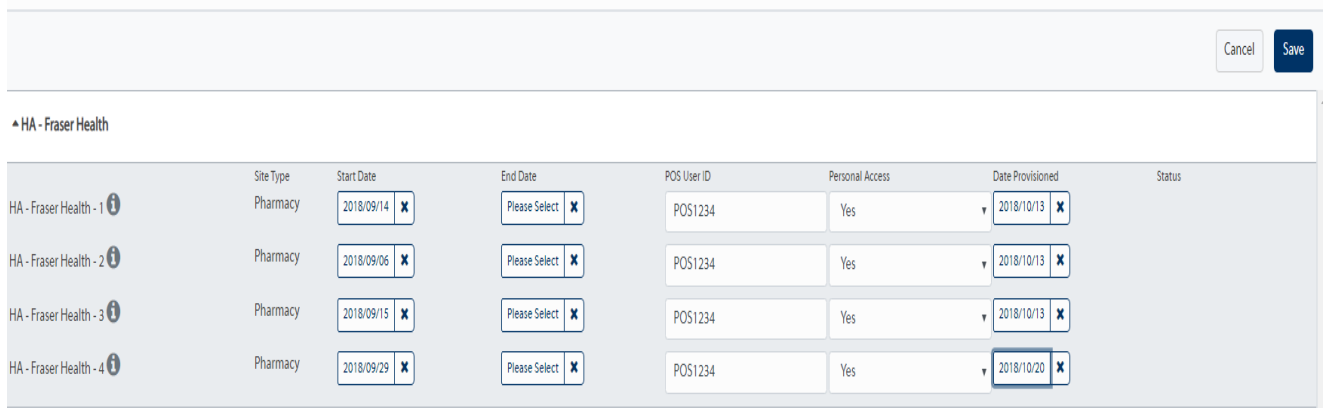


**NOTE**: This question is in place for those Registered Users who may not access personally but have On Behalf Of users acting on their behalf. This step assists in monitoring of erroneous access. If "No" is selected no POS ID is required.

**NOTE**: For future there will be the ability to add "All" sites in bulk to allow for those individual who will require access from all sites in an Organization.

Select the date of Provisioning –



Click on Save



The status will be updated to indicate "Confirmation Requested"

NOTE:

To complete enrolment, the individual is notified via email and is instructed to log into PRIME to confirm Provisioning their PharmaNet access and accept their User Access Agreement terms and conditions of access.

**Provision by Site:**

Provision by Site' is used when provisioning for multiple users at a single Site



Click on the Organization and each site associated with that Organization will display:

Click on the edit button for each site to add/maintain provisioning at that Site

For a new user the Provisioner will click on the Add User button
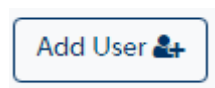


They will search for the Individual using the information provided in the provisioning request e.g. Last Name, First Name, and DOB



Note: If a search returns more than one individual the system will prompt the user to add additional fields to resolve a single return.
All fields must be completed in full – no partial entries e.g. first name: Bob rather Bo

Enter the information and press "Find User"

If the individual returned is the correct individual, select the check box and click on Add User



The user will be added to the site User list as below:
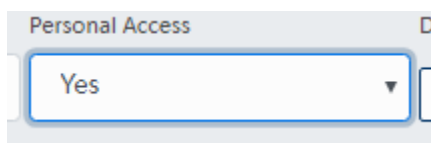
NOTE: The Search/Add can be repeated multiple times.

Access Start Date must be entered, with End Date optional

The POS User ID must be entered to link the POS system with PRIME

The question of Personal Access is answered from the drop down list.



Select the date of Provisioning –

Click on Save



The status for each individual added is updated to indicate "Confirmation Requested"



**NOTE:** Once provisioning is confirmed by MoH the individual is notified via email and instructed to log into PRIME and complete their User Access Agreement to complete Enrolment.