

User Reference Guide For Beneficiary Identification System: State Health Agency (SHA)

AYUSHMAN BHARAT PRADHAN MANTRI-JAN
AROGYA YOJNA (AB PM-JAY)

Web Portal User

Version 1.0
(Updated on 30th Jan'19)

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1. INTRODUCTION

Beneficiary Identification System (BIS) is a process, of applying the identification criteria (as per AB-PMJAY guidelines) on the SECC and RSBY database to approve/reject the applications entitled for the benefits. AB-PMJAY aims to target about 10.74 crore poor, deprived rural families and identified occupational category of urban workers' families as per the latest Socio-Economic Caste Census (SECC) data. Additionally, all families enrolled under RSBY that do not feature in the targeted groups as per SECC data will also be included.

There are following types of user in the process namely:

- National
- State- SHA
- ISA/State-Approver
- Pradhan Mantri Arogya Mitra (PMAM)

2. APPROVAL/REJECTION BY SHA

STATE HEALTH AGENCY (SHA) can Approve or Reject and Release the Beneficiary which have been 'Recommended for Rejection' by ISA/ State Approver also can view Dashboard

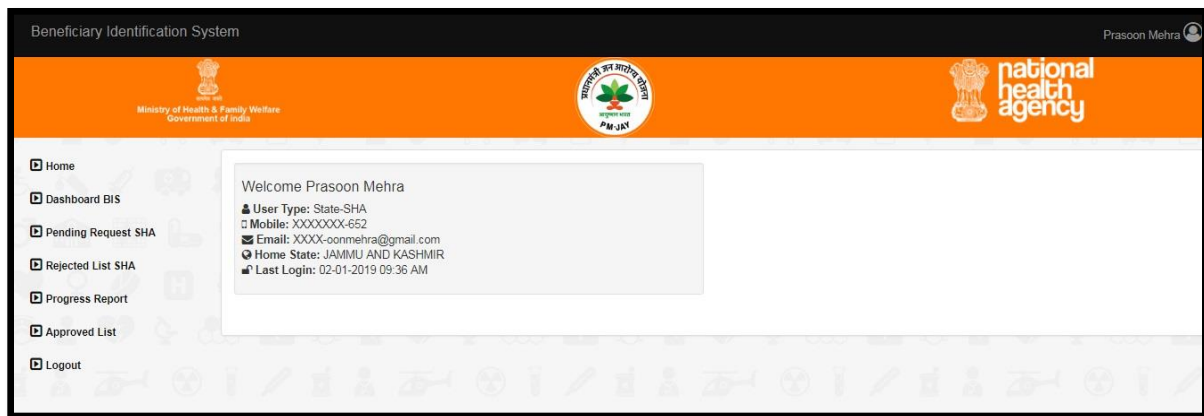


Figure 2

The figure 2 above displays upon successful login. It displays the user details which include **user type, mobile (masked), email(masked), home state and last login**.

It can be seen here that the SHA has the options for '**DashboarD BIS**', '**Pending Request SHA**', '**Rejected List SHA**', '**Progress Report**' and '**Approved List**' a Beneficiary- with an option of '**Hospital**' and '**Non-Hospital**'.

2.1 Pending Request SHA (Hospital)

If a beneficiary is Recommended for rejection by ISA/State Approver, it adds up to the queue for SHA to take necessary action. These can be seen in '**Pending Request SHA**' list.

The figure 2.1 (a), figure 2.1 (b) & figure 2.1 (c) below is displayed when SHA clicks on '**Pending Request SHA**'. On Click at '**Assign Me**' button a record is assigned to SHA for '**Approval**' or '**Reject and Release**'.



Figure 2.1 (a)

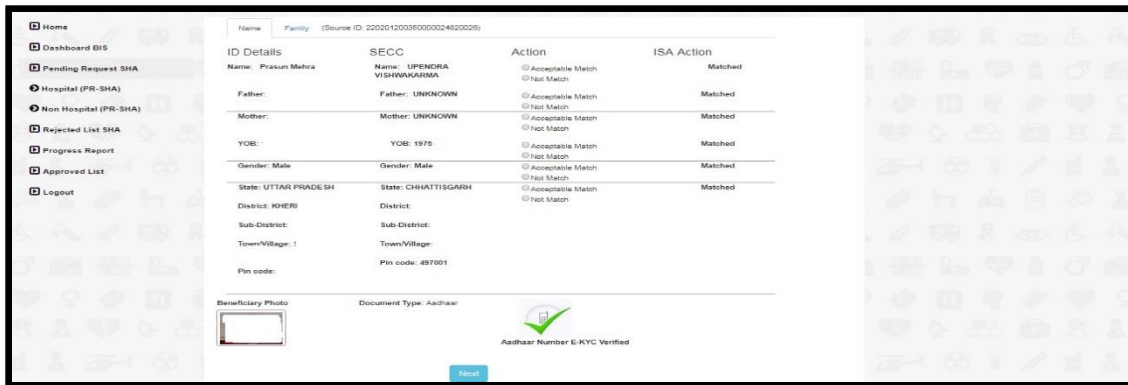


Figure 2.1 (b)

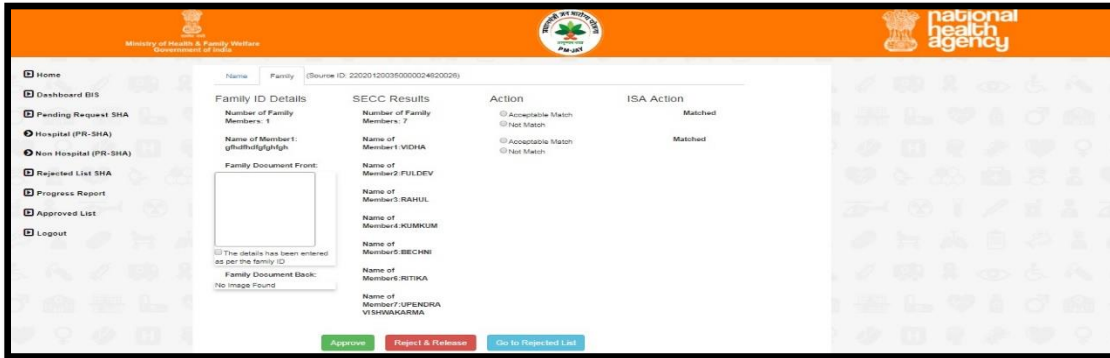


Figure 2.1 (c)

Here, SHA selects ‘**Acceptable Match**’ or ‘**Not match**’ and clicks on “**Approve**” or “**Reject & Release**” Button accordingly with valid reason.

2.2 Advance Search SHA (Hospital):

Figure 2.2 (a) shows ‘**Advance Search**’ functionality provided to SHA. SHA can search beneficiary on the basis of **Name of the Beneficiary** and ‘**Date of Recommendation**’. This feature will work only on those records which are not assigned in Pendency Pool Tab.

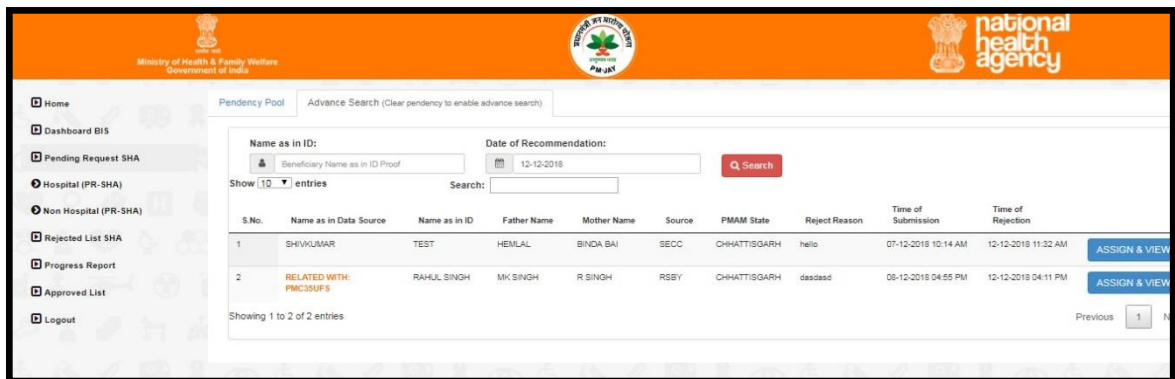


Figure 2.2 (a)

2.3 Rejected List SHA (Hospital):

In this list SHA, can view all the Rejected and Released records. Once Beneficiary is rejected by SHA as shown in figure 2.3, then it can also be viewed by PMAM with Rejected Reason.



S.No.	Family-ID	Data Source	Name in Data Source	Name in Document	Gender	YOB	Reject Reason	Released Time
1	220201200350000024820020	SECC	UPENDRA VISHWAKARMA	PRASUN MEHRA	Male	1989	SDQADF	03-01-2019 09:50 AM
2	22040523113001749	RSEY	NITIN BOY		Male	1998	not matched	02-01-2019 12:29 PM
3	2204007009100000169000087	SECC	PARASNATH	TEST SECC	Male	2001	NOT MATCHED	27-12-2018 01:26 PM
4	2204009001300000019000039	SECC	RAHUL DAAS MAHANT	RAJAT TEST	Male		YOB MISSING	28-11-2018 06:10 PM
5	22040523118000031	RSEY		FGSGDGFDFG	Transgender		rejected	28-11-2018 06:08 PM
6	22040523118000031	RSEY		PRASUN MEHRA	Male	1989	tratrtr	27-11-2018 06:52 PM
7	22040523113001381	RSEY		GGHFGH	Male	1989	not matched	27-11-2018 06:51 PM

Figure 2.3

2.4 Approved List (Hospital):

In this list, SHA can view all Approved Records. SHA can select the date on which record was approved, to view them as shown in figure 2.4 (a) and figure 2.4 (b).

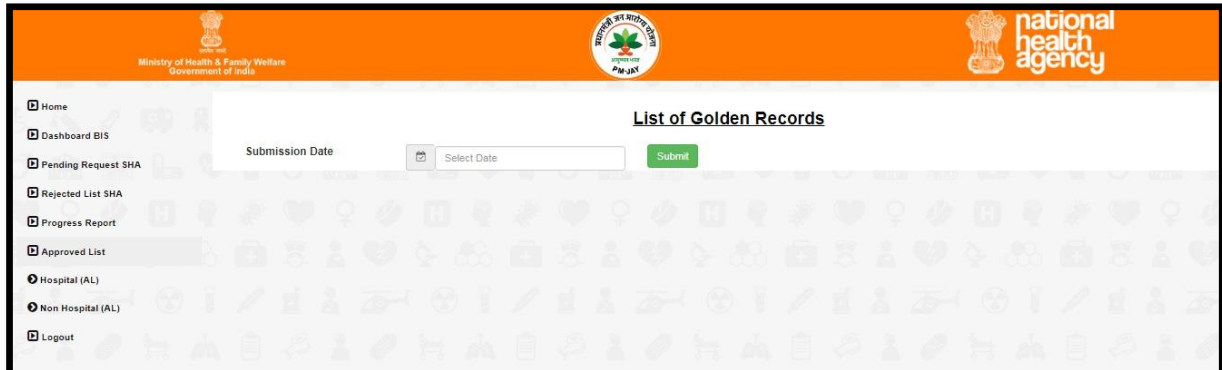
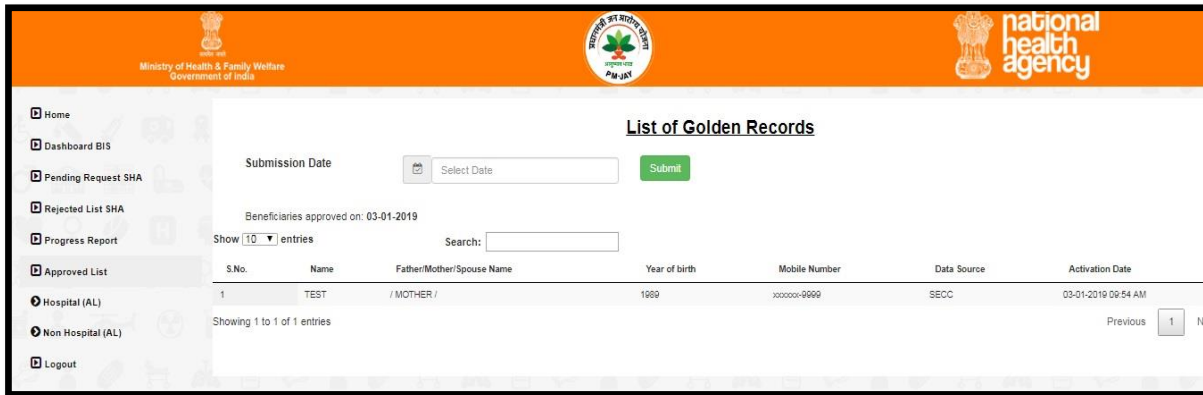


Figure 2.4 (a)



The screenshot shows the 'List of Golden Records' page on the National Health Authority portal. The page includes a navigation menu on the left with options like Home, Dashboard BIS, Pending Request SHA, Rejected List SHA, Progress Report, Approved List, Hospital (AL), Non Hospital (AL), and Logout. The main content area features a 'Submission Date' filter, a 'Beneficiaries approved on: 03-01-2019' message, and a search bar. Below this is a table with the following data:

S.No.	Name	Father/Mother/Spouse Name	Year of birth	Mobile Number	Data Source	Activation Date
1	TEST	/ MOTHER /	1989	xxxxxxxx9999	SECC	03-01-2019 09:54 AM

Below the table, it indicates 'Showing 1 to 1 of 1 entries' and includes pagination controls for 'Previous' and '1'.

Figure 2.4 (b)

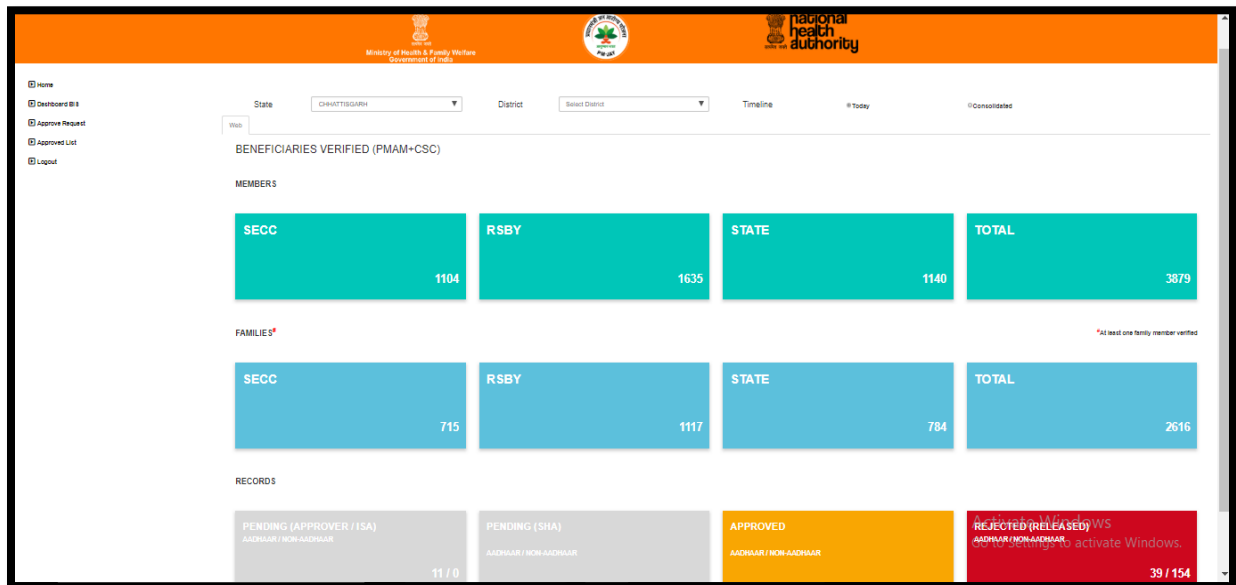
Note: For Non-hospital, same process has to be followed for SHA.

3. EMERGENCY CASE

For the scenario where the beneficiary needs urgent treatment and has been rejected for recommendation by ISA, TMS can flag them as 'Emergency'. This emergency record is given priority over all other pending records in the queue so when the SHA does 'Assign Me', the record which has been flagged will be assigned first to the SHA to approve/reject & release the beneficiary. Once the user is approved, it will be considered as PMJAY beneficiary. In case, the SHA has rejected the record, TMS will not consider this patient as a PMJAY beneficiary and claim amount will be collected from the patient.

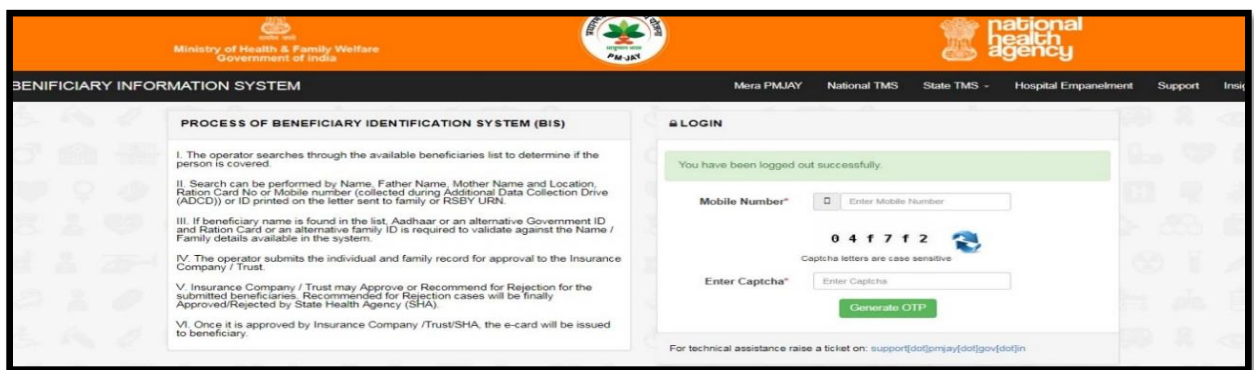
4. DASHBOARD (Hospital/ Non-Hospital)

SHA can see the records based on the data source per member and family. The dashboard also displays the total of records Pending with ISA (Aadhar/ Non-Aadhar), total of records Pending with SHA (Aadhar/ Non-Aadhar), total records approved (Aadhar/ Non-Aadhar) and finally total of records rejected by SHA (Aadhar/ Non-Aadhar). SHA can view them based on the selected State and filtered based on selected district. SHA can view current date data or the consolidated data i.e. all the data till date.



5. LOGOUT

When User clicks on Logout provided in left menu, it log's out the user from application.



The screenshot shows the 'BENEFICIARY INFORMATION SYSTEM' interface. On the left, there is a 'PROCESS OF BENEFICIARY IDENTIFICATION SYSTEM (BIS)' section with six steps:

- The operator searches through the available beneficiaries list to determine if the person is covered.
- Search can be performed by Name, Father Name, Mother Name and Location, Ration Card No or Mobile number (collected during Additional Data Collection Drive (ADCD)) or ID printed on the letter sent to family or RSBY URN.
- If beneficiary name is found in the list, Aadhaar or an alternative Government ID and Ration Card or an alternative family ID is required to validate against the Name / Family details available in the system.
- The operator submits the individual and family record for approval to the Insurance Company / Trust.
- Insurance Company / Trust may Approve or Recommend for Rejection for the submitted beneficiaries. Recommended for Rejection cases will be finally Approved/Rejected by State Health Agency (SHA).
- Once it is approved by Insurance Company /Trust/SHA, the e-card will be issued to beneficiary.

On the right, the 'LOGIN' section shows a successful message: "You have been logged out successfully." Below this, there are input fields for 'Mobile Number' and 'Enter Captcha' (0 4 f 7 f 2), a 'Generate OTP' button, and a technical support link: "For technical assistance raise a ticket on: support@dotgmsay(dot)gov(dot)in".