

# Identifying overseas visitors:

User guide to the Message Exchange for Social  
Care & Health (MESH)

August 2019



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## What is the MESH tool?

The Message Exchange for Social care and Health (MESH) tool helps overseas visitor managers (OVMs) working in secondary care, to identify possible non-UK residents who are required to pay for provided healthcare.

Covering the majority of NHS trusts and NHS foundation trusts, the MESH tool provides patient information (such as NHS number and date of birth) to [Spine](#) (who maintain our NHS IT infrastructure nationwide) via a MESH mailbox to recognise indicative or potential chargeable status and demographics.

## Key benefits of the MESH tool

- MESH is a free, secure NHS Digital product with no associated software or licensing costs and includes full 24/7 user support.
- Reduces time and effort of cross-checking patients individually against the Spine.
- A systematic check of patients' chargeable status.
- Filtering returned data frees up time.
- Automates the process to assist up-front charging and billing.
- Proactive identification of visitors in advance enhances up front charging and subsequent potential waiting list reductions.
- Increased identification and possible income generation.
- MESH supports cost avoidance ie surcharge payees seeking fertility treatment easy identification and cancellation of appointments in advance.

## Minimum system requirements

- To use the MESH tool, you will need a Smartcard with role-based access control (RBAC) 0259/0266 access; MESH mailbox; and an input file in the correct .dat (data) format.

## Key information and helpful tips

- RBAC lets employees have access rights only to the information they need to effectively carry out their jobs. A registration authority (RA) agent within your organisation will assign your B0259 or B0266 access code to your smartcard.
- How many records? Up to 1000 records per submission with no limit on the number of daily batch submissions.

- How to setup? With the assistance of a local administrator and IT department – mailbox request form is available on the NHS Digital website - see the [MESH Online Enquiry Service](#).
- Within the Department of Health and Social Care (DHSC) [eXchange toolbox](#) locate and save a copy of the OVMReadRequest Excel spreadsheet (also referred to as the MESH tool) to your local internal drive, this will be used to convert and submit NHS numbers and date of births to summary care records (SCRa) for cross matching.
- Further information can be found in the MESH folder on the [DHSC eXchange](#).

## Getting started

Prior to using the MESH tool, you will need the organisational data necessary to provide the required accurate information.



Contact your local IT or Informatics team to develop and request an internal report of all trust patient data for submission ie new outpatient appointments, inpatients and waitlist patients etc. Please note that if this data exceeds the 999 records threshold, your data will need to be split into batches for upload.

NHS Number	DoB
9990006954	22/02/2006
9990006660	05/11/2005
9990045704	13/08/1983
9990095485	01/02/1948
9990104018	16/01/1912
9990104034	20/10/1941
9990040257	25/05/1974
9990241902	23/05/2007
9990240272	29/10/1943
9990240736	01/10/1994

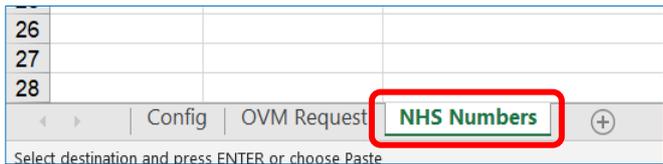
Your internal IT reports can be developed in an Excel format. Your IT or Informatics teams can develop these reports for you on a daily basis. Please ensure that the required fields NHS number and date of birth are adjoining and that the date of birth field is formatted as DD/MM/CCYY to ensure compliance with MESH upload submissions.

It is important that your Information Governance department is aware of the OVM activities and data control. Data extracted from MESH must be protected appropriately, whether stored locally, on servers, removable media, or paper, which should be destroyed when no longer needed for your intended purpose (as referenced in your trust's privacy statement and record retention policy).

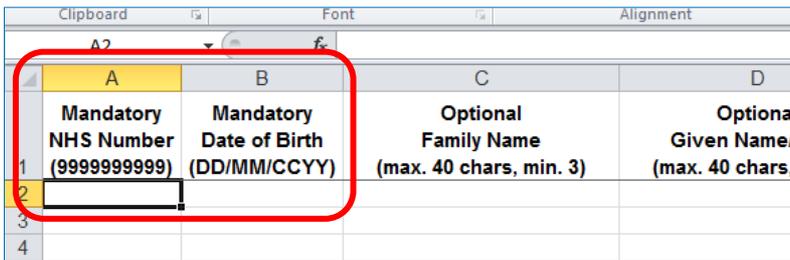
## Overseas visitor managers read requests

You will now need to input and submit your data as an OVM read request. This is essentially an Excel spreadsheet displaying visitor demographics in order to bulk query and obtain the chargeable status for a list of patients from Spine.

Open your read request spreadsheet and select Enable Content on start-up.

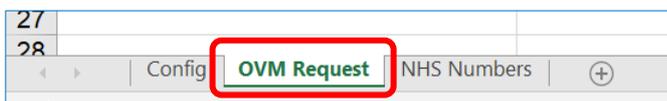


Click the NHS Numbers tab within the Excel MESH read request file.

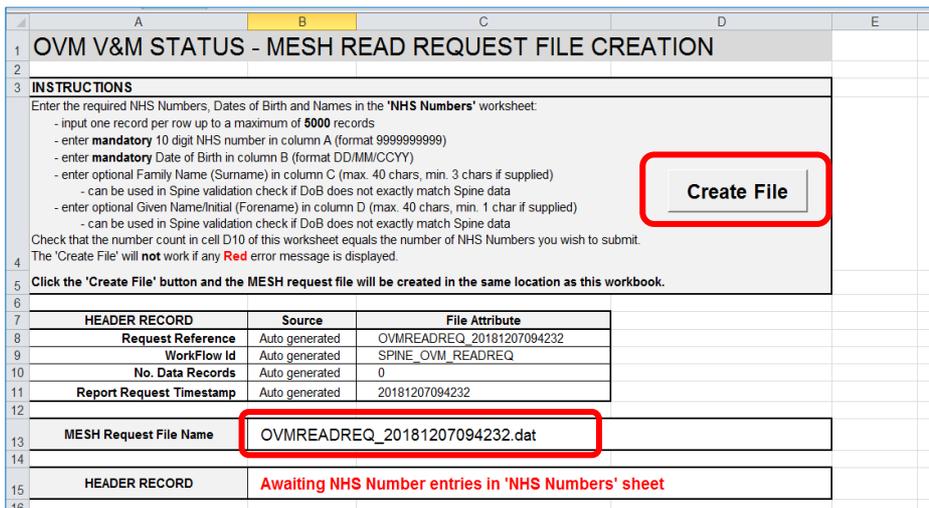


Collate your report data ie outpatients, inpatients and waitlist patient NHS numbers and date of births, then copy and paste these data items into the mandatory NHS Number (9999999999) and mandatory date of birth (DD/MM/CCYY) columns.

If an incorrect mandatory field is entered an error message will be displayed in red until corrected.



Click the OVM Request tab to create your file.

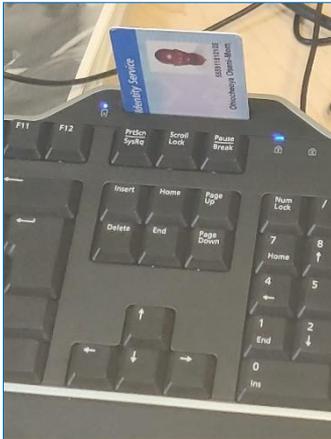


Click Create File button within the MESH read request file to create your OVM read request .dat (data) file for submission to the Spine.

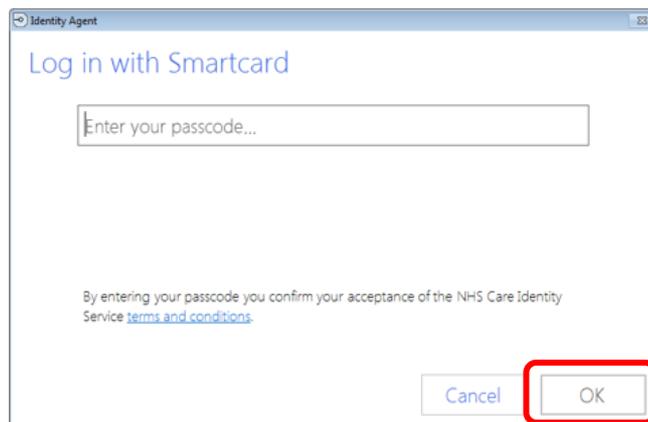
Your file will be 'timestamped' for ease of identification when you need it later on.

## Accessing the Spine portal

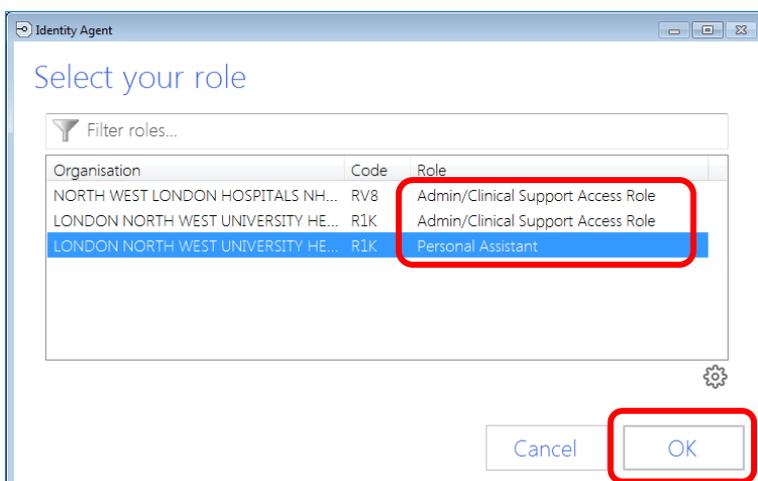
Spine allows information to be shared securely through national services such as summary care records (SCRa). The spine contains information as to whether a patient may be charged for their healthcare.



Start by inserting your Smartcard into the reader on your keyboard.



When the login screen appears, enter your passcode and click OK.



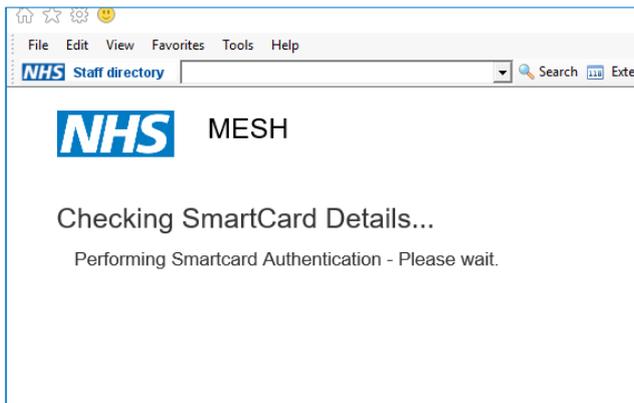
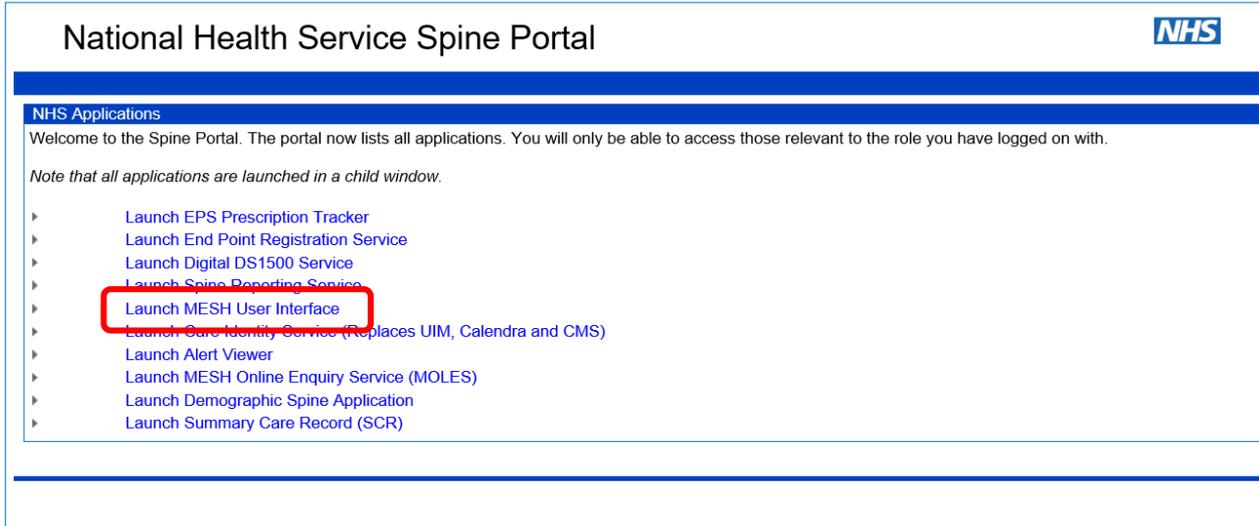
If required, select your Role, this will be your role with RBAC 0259/0266 access assigned.

Click OK.

Now launch the [NHS Spine application](#) in your browser.

You will now see a list of applications accessible via the Spine portal. You will only be able to access those applications which are relevant to the role you logged with.

Scroll down the list and select Launch MESH User Interface.



Once clicked, your Smartcard will be verified to ensure you have the right credentials to access this particular application

Your trust mailbox will now be displayed with your user name (next to the person icon in the top right corner of the screen and your trust name clearly displayed to inform you that you are on the correct path.

NHS Message Exchange for Social Care and Health

**NHS FOUNDATION TRUST - SPINE**  
SUBMISSIONS - REPHC001 - REP

Inbox Sent Page last refreshed at: 10:53 [New Message](#)

Search

Mailbox Name	Type	Received On	Expires On	
INTERNAL-SPINE	Spine OVM Bulk Visitor and Migration Info...	24-May-2018 09:46	29-May-2018 09:46	<a href="#">Download</a>
INTERNAL-SPINE	Spine OVM Bulk Visitor and Migration Info...	21-May-2018 10:39	26-May-2018 10:39	<a href="#">Download</a>
INTERNAL-SPINE	Spine OVM Bulk Visitor and Migration Info...	18-May-2018 08:45	23-May-2018 08:45	<a href="#">Download</a>
INTERNAL-SPINE	Spine OVM Bulk Visitor and Migration Info...	16-May-2018 12:33	21-May-2018 12:33	<a href="#">Download</a>

Click New Message.

NHS Message Exchange for Social Care and Health

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INTERNAL-SPINE	Spine OVM Bulk Visitor and Migration Info...	16-May-2018 12:33	21-May-2018 12:33	<a href="#">Download</a>
INTERNAL-SPINE	Spine OVM Bulk Visitor and Migration Info...	11-May-2018 09:59	16-May-2018 09:59	<a href="#">Download</a>
INTERNAL-SPINE	Spine OVM Bulk Visitor and Migration Info...	04-May-2018 09:50	09-May-2018 09:50	<a href="#">Download</a>
INTERNAL-SPINE	Spine OVM Bulk Visitor and Migration Info...	03-May-2018 08:49	08-May-2018 08:49	<a href="#">Download</a>
INTERNAL-SPINE	Spine OVM Bulk Visitor and Migration Info...	02-May-2018 09:47	07-May-2018 09:47	<a href="#">Download</a>

10 1

**NHS** Message Exchange for Social Care and Health

NHS FOUNDATION TRU  
SUBMISSIONS - REPHC001 - REP

Inbox Sent

### New message

**\* Select Message Type**  
 Spine OVM Bulk Visitor and Migration Information Request (SPINE\_OVM\_READREQ) ▼  
Please select a message type from the drop down list

**\* To**  
 INTERNAL-SPINE - INTERNAL-SPINE × ▼  
Select a message type before choosing a recipient

**\* Attach a document**  
  
Please attach the relevant document here

[+ Additional Information](#)

Select Spine OVM Bulk Visitor and Migration Information Request from the Select Message Type drop down menu.

Select Internal Spine from the To drop down menu,

Locate your file via the Attach a document field by clicking the Select file button.

Select your .dat (data) file from your drive and click Submit.

## MESH responses



Upon submission, repeatedly press F5 to auto refresh your screen until your .dat (data) response file becomes available to download. Submitting 100's of NHS numbers and date of births takes seconds and 1000's of NHS numbers and date of births takes minutes.

Click your bold highlighted response file. Select Download and save your returned .dat (data) file to your local drive.

The screenshot shows the NHS Message Exchange for Social Care and Health interface. At the top, it says "NHS TRUST - SPINE" and "SUBMISSIONS - RYJHC001 - RYJ". There are tabs for "Inbox" and "Sent". A search bar is present. Below is a table of submissions with columns: Mailbox Name, Type, Received On, Expires On, and a Download button. The first row's Download button is highlighted with a red box.

Mailbox Name	Type	Received On	Expires On	Download
<b>INTERNAL-SPINE</b>	<b>Spine OVM Bulk Visitor and Migration I...</b>	<b>12-Jun-2019 14:49</b>	<b>17-Jun-2019 14:49</b>	<b>Download</b>
INTERNAL-SPINE	Spine OVM Bulk Visitor and Migration Info...	10-Jun-2019 08:44	15-Jun-2019 08:44	Download
INTERNAL-SPINE	Spine OVM Bulk Visitor and Migration Info...	10-Jun-2019 08:43	15-Jun-2019 08:43	Download
INTERNAL-SPINE	Spine OVM Bulk Visitor and Migration Info...	04-Jun-2019 12:51	09-Jun-2019 12:51	Download
INTERNAL-SPINE	Spine OVM Bulk Visitor and Migration Info...	04-Jun-2019 12:23	09-Jun-2019 12:23	Download
INTERNAL-SPINE	Spine OVM Bulk Visitor and Migration Info...	04-Jun-2019 12:09	09-Jun-2019 12:09	Download
INTERNAL-SPINE	Spine OVM Bulk Visitor and Migration Info...	03-Jun-2019 08:54	08-Jun-2019 08:54	Download
INTERNAL-SPINE	Spine OVM Bulk Visitor and Migration Info...	03-Jun-2019 08:54	08-Jun-2019 08:54	Download
INTERNAL-SPINE	Spine OVM Bulk Visitor and Migration Info...	31-May-2019 16:29	05-Jun-2019 16:29	Download
INTERNAL-SPINE	Spine OVM Bulk Visitor and Migration Info...	31-May-2019 16:04	05-Jun-2019 16:04	Download

When the dialog box appears at the bottom of the screen, select the drop-down arrow next to the Save option and select Save As from the subsequent menu.

The screenshot shows a file dialog box with the text: "Do you want to open or save RESP\_OVMREADREQ\_20190612144736\_20190612134917.dat from portal2.national.ncrs.nhs.uk?". There are buttons for "Open", "Save", and "Save and open". The "Save" button has a dropdown arrow, and the "Save as" option is highlighted with a red box.

The screenshot shows a file explorer window with the following details:

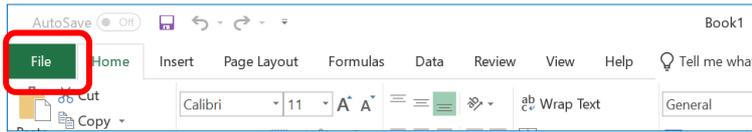
- File name: RESP\_OVMREADREQ\_20190612144736\_20190612134917
- Save as type: DAT File
- The "Save" button is highlighted with a red box.

Click Save to store the file.

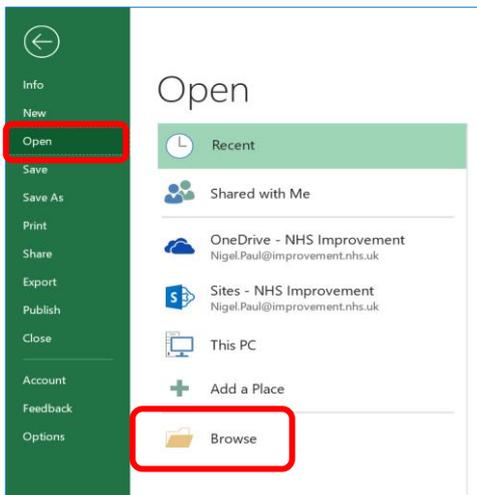
A .DAT (data) file will be automatically generated and stored locally within your specified drive. Here is an example of a response .dat (data) file.

Name	Date modified	Type	Size
OVREADREQ_20180223100442	23/02/2018 10:05	DAT File	1 KB

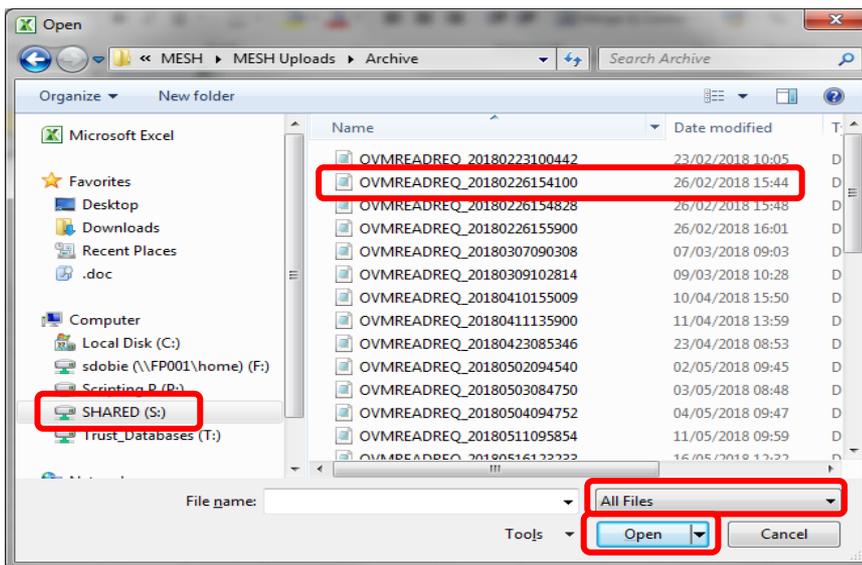
Do not change the name of this file prior to submission.



Open a new Excel spreadsheet. Select File.



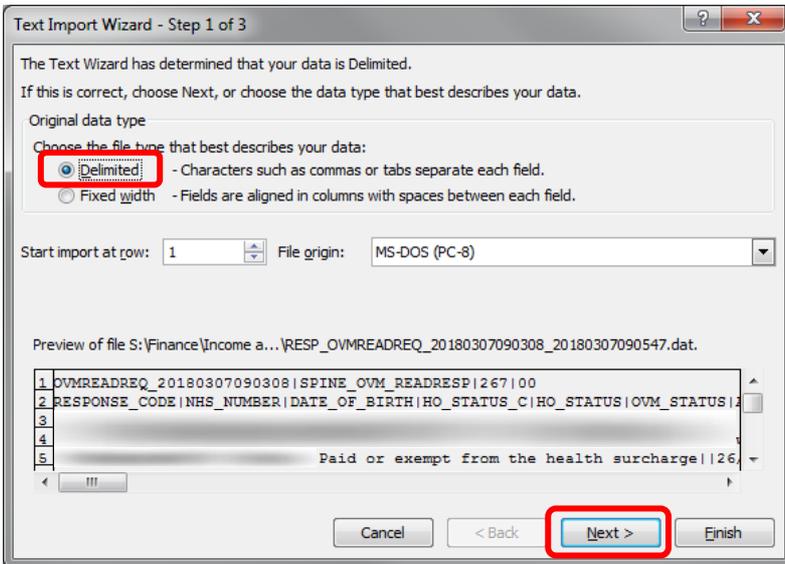
Scroll down the list on the sidebar and select **Open** and then click **Browse** to find the folder where your file is stored.



Click on the folder in which your file is stored, to open it.

Ensure that All Files has been selected so that the full list of dat. files are displayed.

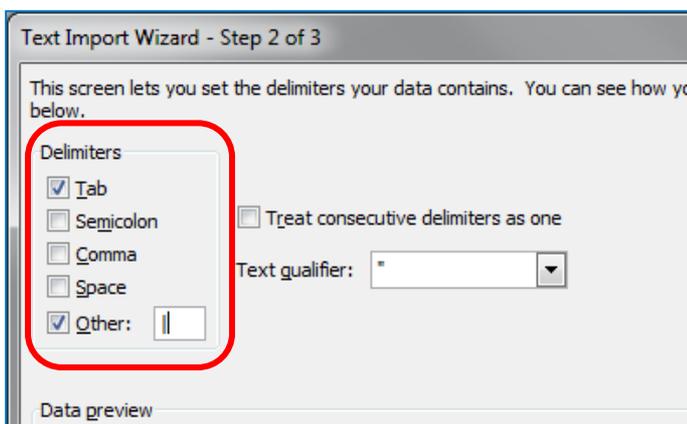
Select your response .dat (data) file, then click Open.



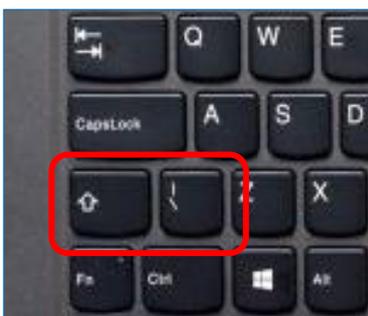
An excel wizard dialog box will appear.

Using this Text Import Wizard, select Delimited.

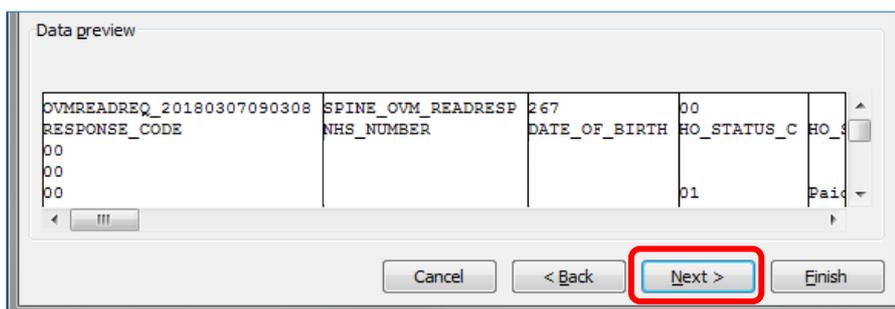
Click Next.



For Step 2, untick the Tab delimiter and tick Other within the delimiters box.



Select Shift and the vertical bar symbol (typically located above backslash symbol) which will split the file into columns. This is known as a pipe command.



Now click Next.

Text Import Wizard - Step 3 of 3

This screen lets you select each column and set the Data Format.

Column data format

General  
 Text  
 Date: DMY  
 Do not import column (skip)

'General' converts numeric values to text.

Data preview

Text	General	General	General
OVMSREADREQ_20180803122136	SPINE_OVM_READRESP	15	
RESPONSE_CODE	NHS_NUMBER		DAT

When the final Wizard step appears, click to highlight the Response Code column (under the Text heading) and then change the Column data format from General to Text.

Column data format

General  
 Text  
 Date: DMY  
 Do not import column (skip)

'General' converts numeric values to numbers, date values to text, and text values to text.

Advanced...

Data preview

Text	General	General	Text	General
OVMSREADREQ_20180803122136	SPINE_OVM_READRESP	15	00	
RESPONSE_CODE	NHS_NUMBER	DATE_OF_BIRTH	HO_STATUS_C	00

Now highlight the HO\_Status\_C column and again change the data format from General to Text. This will ensure the status codes will appear correctly ie response code 00 Success and HO Status Code 02 Likely chargeable for NHS services

General	General	General	General	General
OVMSREADREQ_20190612144736	SPINE_OVM_READRESP	11	00	
RESPONSE_CODE	NHS_NUMBER	DATE_OF_BIRTH	HO_STATUS_C	HO_S
00	9990006954	22/02/2006	01	Paid
00	9990006660	05/11/2005	02	Like
00	9990045704	13/08/1983	01	Paid

Click **Finish**.

## Response OVM read request file

The query response file will contain multiple data records with a record for each patient, providing OVMs and overseas visitor officers with information to assist in determining eligibility to free NHS treatment.

Having clicked Finish, your response .dat (data) file will now present your data within Excel.

A	B	C	D	E	F	G	H	I	J
1	O SPINE_OVM_READRESP	267	0						
2	R NHS_NUMBER	DATE_OF_BIRTH	HO_STATUS_C	HO_STATUS	OVM_STATUS	ALLOC_DATE	SUPERSEDED_BY	FAMILY_NAME	GIVEN_NAME
3	0					30/08/2016			
4	0					01/08/2017			
5	0			1 Paid or exempt from the health surcharge		26/09/2017			
6	0					04/02/2016			
7	0					22/09/2017			
8	0					08/03/2017			
9	0				P	13/02/2018			
10	0					07/04/2017			
11	0					16/02/2017			
12	0			1 Paid or exempt from the health surcharge		02/11/2015			
13	0			1 Paid or exempt from the health surcharge		28/11/2017			
14	0					05/12/2017			
15	0			1 Paid or exempt from the health surcharge		06/09/2016			
16	0					25/07/2017			
17	0					05/10/2016			
18	0				P	30/01/2018			
19	0					16/05/2016			
20	0			1 Paid or exempt from the health surcharge		13/06/2017			
21	0					02/03/2016			
22	0					01/12/2017			
23	0					25/09/2017			
24	0			1 Paid or exempt from the health surcharge		26/09/2017			
25	0					05/10/2017			
26	4								
27	0			1 Paid or exempt from the health surcharge		24/05/2017			
28	0			1 Paid or exempt from the health surcharge		10/10/2017			
29	0			1 Paid or exempt from the health surcharge		28/11/2017			
30	0			1 Paid or exempt from the health surcharge		10/10/2017			
31	0					12/04/2017			
32	0					05/06/2017			
33	0			2 Likely chargeable for NHS Services		23/08/2016			

The table displays those who have paid or are exempt (in this example, circled in green), those who are likely to be chargeable (circled in red) and where there is a decision pending, P is displayed (circled in this example, in Amber)

Quick tip:

- You can quickly sort the data by selecting the corner arrow and double-clicking between column A and B in the tab bar.

	A	B	C	D	E
1	OVMREADREQ_20190612144736	SPINE_OVM_READRESP	11	0	
2	RESPONSE_CODE	NHS_NUMBER	DATE_OF_BIRTH	HO_STATUS_C	HO_STATUS

The Query Response Record Data table provides a numeric code regarding the processing of each individual request ie 00 provides a successful match with a visitor identified from a Trusts Patient Administration System and the Spine, providing possible further information as to whether the visitor is likely chargeable, surcharge paid or exempt alternatively checks may need to be done for further evidence.

Data Record	
Field Title	Content
RESPONSE_CODE	<p>A numeric code representing the outcome of processing the individual request.</p> <p>Valid values are:</p> <p>00 Success</p> <p>01 Failure: Invalid format/missing NHS Number</p> <p>02 Failure: NHS Number not found on Demographics (or flagged "Invalid")</p> <p>03 Warning: NHS Number superseded on Demographics</p> <p>04 Failure: X-check failed</p> <p>05 Failure: Missing DoB</p> <p>06 Failure: Invalid DoB</p> <p>07 Failure: parse failure</p> <p>99 Failure: unexpected error</p>

Quick tip:

- Further information for all fields in the tab bar can be located in the OVM Query Batch document, section 2.2.3 available within the OVM Toolbox, Finance, MESH on the [DHSC eXchange](#).

	A	B	C	D	E	F	G	H	I	
1	QUMREXPRES_20190513141235	SPINE_OVM_RESPONSE	11							
2	RESPONSE_CODE	NHS_NUMBER	DATE_OF_BIRTH	HO_STATUS_C	HO_STATUS	OVM_STATUS	ALLOC_DATE	SUPERSEDED_BY	FAMILY_NAME	GIVEN

## Need help?

Should you discover issues with MESH, in the first instance, you should contact your own trust IT helpdesk to rule out if one or all of the following, is causing the issue:

- user local network account
- hardware (eg PC)
- software (eg web browser).



If no local issues are found, please contact the National Service Desk via email or telephone. Please ensure you state Spine-OVM in your communications and state the severity to ensure it is directed to the correct support operative

## Known issues and requests

- Once local support from your IT department has established there is a MESH mailbox problem unrelated to your PC and its setup, you will need to log an email/call with NHS Digital National Service Desk.
- Urgent issues will need to be raised as an Incident under Spine-OVM Severity 3.
- General information/non-urgent requests need to be raised as a Service Request Spine-OVM Severity 4.
- An attempt may be made on a call to resolve your issue immediately or it may be passed/deferred to a dedicated team member to help in resolution.
- This table outlines NHS Digital's priority type and timescales in providing a response and resolution to your incident or request.

Severity / Priority	Maximum Resolution Target
3	Used for mailbox deactivation/password changes/urgent new mailbox requests - 15 working hours maximum resolution
4	Used for general enquiries / non urgent – Maximum 10 working days resolution.

- OVMs should note the priority number severity, those who do not receive a resolution within the appropriate timescales should escalate via the NHS service desk (details are outlined below).
- When your issue is resolved or your request completed, the National Service Desk will close the call and will inform you via a confirmation email.

If you have any further questions or queries, please contact the NHS Digital National Service Desk on 0300 3035 035 or email [ssd.nationalservicesdesk@nhs.net](mailto:ssd.nationalservicesdesk@nhs.net).

Further MESH information, documentation and helpful videos can be found in the OVM Toolbox on the [DHSC eXchange](#) forum. If you don't have an account and wish to become a member then please email your details to: [NHSCostRecovery@dhsc.gov.uk](mailto:NHSCostRecovery@dhsc.gov.uk).

**Contact us: 0300 123 2257 | [enquiries@improvement.nhs.uk](mailto:enquiries@improvement.nhs.uk) | [improvement.nhs.uk](http://improvement.nhs.uk)**

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