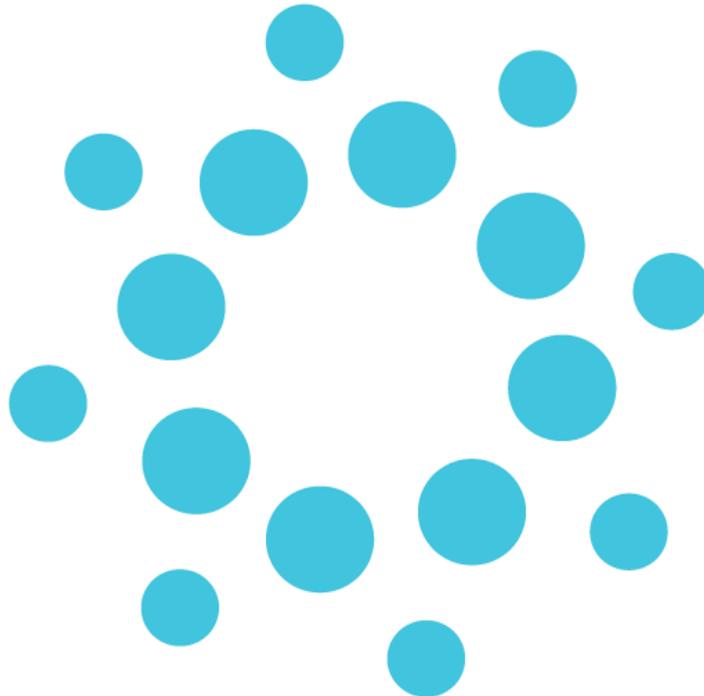


NES Gap Catch-Up Utility

Instructions for Medtech32 and Medtech Evolution



This document contains important information for Medtech users. Please ensure that it is circulated amongst all relevant staff. We suggest that the document is filed safely for future reference.

Why should the Gap Catch-Up Utility be run?

The practice register exported by the practice to the PHO is loaded into NES each quarter until the practice goes live on NES.

Once a practice has gone live, the Gap Catch-Up Utility must be run to ensure all enrolment activity that has occurred in the PMS since the export date until the Go-Live date is updated in NES.

The Gap Catch-Up Utility should only be run once. After it is run, all NES updates should be made from the PMS.

Gap Catch-Up Instructions

Step 1

Consider running the Gap Catch-Up Utility at a quieter time of day to avoid slower loading times.

Step 2

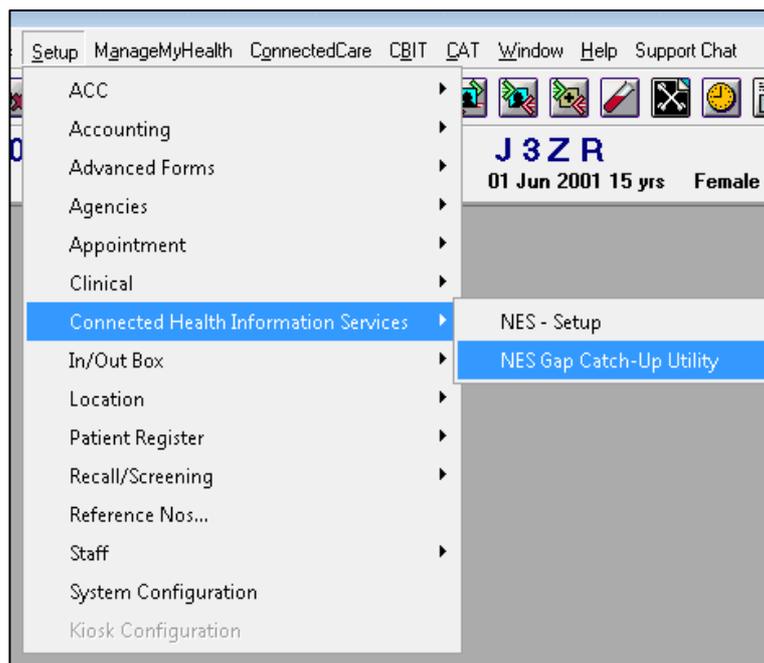
Run the Gap Catch-Up Utility by going to the following path:

Medtech32

Setup ► Connected Health Information Services ► NES Gap Catch-Up Utility

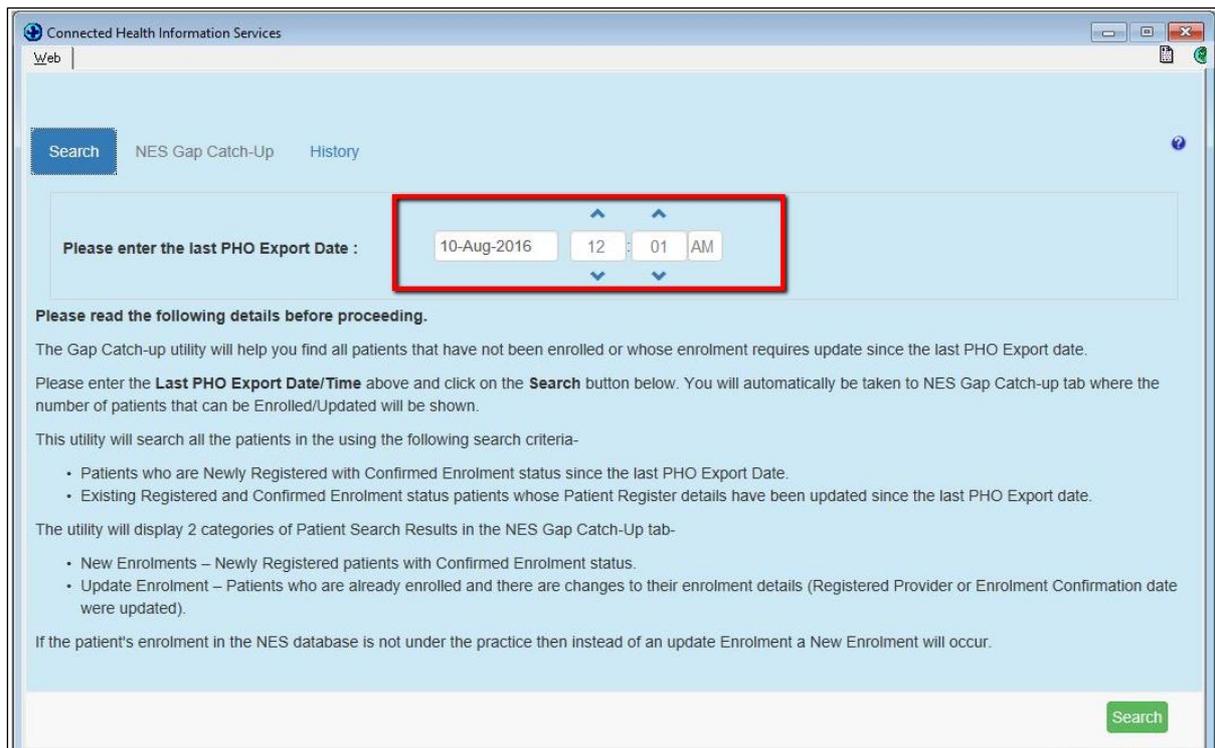
Medtech Evolution

File ► Options ► Connected Health Information Services ► NES Gap Catch-Up Utility



Step 3

- Enter the date of the last PHO CBF Export run prior to the Go-Live date.
 - For Tranche 1 practices, this will be a date in May.
 - Tranche 2 and 3 practices will have a date in August.
- Enter the start time = 12:01am.



Step 4

Click the '**Search**' button. A loading message will be displayed and the progress will show on a thin bar at the top of the box.

Step 5

Once the **Search** function is completed, click the '**Submit**' button. Another loading message with a thin progress bar will show as it runs. The function will have finished running when the number to be actioned matches the number of New Enrolments and Update Enrolments + number of Rejected/Errors.

Step 6

Go to the **History** tab to review the outcome and errors. The results can be sorted by clicking in the column heading. The sorted results can be printed out in the preferred order (i.e. by outcome, surname, NHI, etc.).

Step 7

To view the error details, go to the **History** tab and select the error row. The error message will show at the bottom of the window. Likely errors are missing NHI numbers or that identity information in the PMS differs from the NHI (e.g. a DoB or Gender difference, or the wrong NHI number has been allocated to the patient).

These errors need to be investigated. Then the patient needs to be validated and synchronised. Next, enrol the patient using the **'Enrol'** button at the bottom of the **Patient Demographics Comparison** screen.

Selected Record : 19 Oct 2016 08:43 PM

NHI	Family Name	Middle name	Given Name	Date of Birth	Gender	Requests	Outcomes
ZAU5687	TEST		NNFF	10 Oct 2016	M	Enrol Patient	Patient Alreac
GZH8646	EROPE	S T	A EUROPE	01 Jan 1970	M	Enrol Patient	Patient Alreac
HAR6018	ECHO-EE	B	R	01 Jan 1900	M	Enrol Patient	Patient Alreac
GZH1587	TEST		TEST	01 Jan 1950	U	Enrol Patient	Patient Alreac
GXA1512	A		AA	01 Jan 1900	M	Update Enrolment	Error
ZAU4362	TEST		NOT	04 Oct 2016	F	Enrol Patient	Enrolled
ZAB9051	SMITH	TEST AGAIN	NIKI	01 Jan 1970	F	Update Enrolment	Enrolled

EM11013 - A more recent enrolment (based on local processing date) already exists in the system

Requests	Submitted	Accepted	Rejected/Error	Patient Already Enrolled
New Enrolment	5	2	0	4
Update Enrolment *	2	0	1	0
Total	7	2	1	4

* If you find any discrepancy in the Submitted vs Accepted numbers above, it is because when this utility attempted an Update Enrolment, in the NES database the patient was not enrolled with the practice, hence the utility performed a New Enrolment.

Step 8

The Gap Catch-Up Utility does not enrol any babies entered in the PMS as a B code during the gap period. Run the following query for Newborn Preliminary Enrolments (B).

Column	Condition
Patient - Registered	Equal to Registered (R)
Patient - Enrolment Status Code	Equal to Newborn Preliminary Enrolment (B)
Patient - Enrolment Confirmed/Declined Date	Between ' <export date> and <today's date> '

Build query in order as specified above (for advanced users only!)

Select

- Patient - Name Surname
- Patient - Name First Name
- Patient - NHI No
- Patient - Enrolment ID

Query Store

Run Query

- a. If the baby has no Enrolment ID showing on the query, then enrol the baby with a **Pre-Enrol** status. To perform this action, first validate and synchronise the patient details with NHI, then choose the **'Enrol Patient'** button on the bottom of the **Patient Demographics Comparison** screen.

Connected Health Information Services

Web | NHI > Patient Demographics Comparison

Medtech32 Version: 2854447, Oct 19, 2016

Surname: Test

First Names: Bop

Middle Names:

Gender: Female

Street Address: 49 Big Stone Road

Suburb: Brighton

Town / City: Dunedin

Post Code: 9091

Place of Birth:

Date of Birth: 12-Jun-2015

Date of Death:

NHI: HBV2418

Ethnicity 1:

Ethnicity 2:

Ethnicity 3:

NHI Version: 2854447, Oct 19, 2016

Family Name: TEST

Given Name: BOP

Other Given Name: NHI Data held for the patient

Gender: Female

Street Address: 49 Big Stone Road

Suburb: Brighton

Town / City: Dunedin

Post Code: 9091

Place of Birth:

Date of Birth: 12 Jun 2015

Date of Death:

NHI: HBV2418

Ethnicity 1: New Zealand European (11111)

Ethnicity 2:

Ethnicity 3:

[View Patient Register Audit](#)

[Save to Medtech32](#)

[Review & Update NHI](#)

[View Details](#)

Step 1 - Compare the details between the two Records. Step 2 - Review & Update NHI if required. Step 3 - Select/Unselect relevant fields and Save details back into Medtech PMS for synchronisation. Step 4 - Select the appropriate button to Enrol the patient or Update Enrolment.

[Enrol Patient](#)

[Update Active Enrolment](#)

[View Enrolment](#)

In the **Enrol Patient** screen, select the **Pre-Enrol (Newborn Babies)** option for the **Enrolment Action** in the **Enrolment Parameters** section and click the **'Save'** button.

b. If the baby does have an Enrolment ID showing on the query, then this is a baby that was a 'B code' at the time of export and during the gap period they were changed to a Confirmed Enrolment (C).

The Gap Catch-Up Utility has changed these back to a 'B' in the PMS. These will need to be corrected in the PMS and enrolled in NES.

Go to the **Enrolment Funding** tab and change the enrolment confirmed to 'C'. Then click the **'NHI'** button to validate and synchronise. Next, click the **'Enrol Patient'** button on the bottom of the **Patient Demographics Comparison** screen and enrol the baby in NES with an Enrolment Action of **'Enrol'**.

Connected Health Information Services

National Enrolment Service > Enrol Patient

Enrolment Parameters

Enrolment Choice: Create Patient Provider Enrolment

Enrolment Action: Enrol, Pre-Enrol (Newborn Babies)

Health Service Type: First Level Services

Patient Provider Enrolment Details

Patient Demographic Details

Patient Declarations

First Level Provider: I choose to enrol with this practice as my regular and ongoing provider of first level health care services

Residing Permanently in NZ: I will be in NZ at least 183 days(6 Months) in the next 12 months

PHO Informed Consent: I have been informed of the PHO with which my chosen Practice is affiliated and the services available through the PHO and I have signed a Provider/PHO enrolment form

Patient agrees to all the above declarations

View Patient Register Audit

Back Save Reset

Select Enrolment Action, confirm Local Processing Date, tick Patient Declarations & click Save

Step 9

Email the PHO with Gap Catch-Up in the Subject Line and include the following details in the message:

- a. practice name
- b. HPI OrgID
- c. the PHO Export date used
- d. the date the Gap Catch-Up Utility was run

Checking all enrolments are in NES

Run the following query to report any patients showing as enrolled in the PMS since the Go-Live date but not yet updated in NES.

Use the last PHO Export date before NES Go-Live and today's date as the date range for the **'Enrolment Confirmed/Declined Date'** in this query.

Run this daily after Go-Live while staff are getting used to the NES changes.

Any patients showing on the report need to be reviewed and enrolled in NES.

