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.

Connected Health Information Services		
web		
Search NES Gap Catch-Up History		Ø
Please enter the last PHO Export Date :	10-Aug-2016 12 01 AM	
Please read the following details before proceed	ding.	
The Gap Catch-up utility will help you find all patie	nts that have not been enrolled or whose enrolment req	uires update since the last PHO Export date.
Please enter the Last PHO Export Date/Time about number of patients that can be Enrolled/Updated v	ove and click on the Search button below. You will auto vill be shown.	matically be taken to NES Gap Catch-up tab where the
This utility will search all the patients in the using t	he following search criteria-	
Patients who are Newly Registered with Co Existing Registered and Confirmed Enrolmer	nfirmed Enrolment status since the last PHO Export Dat ent status patients whose Patient Register details have t	e. been updated since the last PHO Export date.
The utility will display 2 categories of Patient Sear	ch Results in the NES Gap Catch-Up tab-	
 New Enrolments – Newly Registered patien Update Enrolment – Patients who are alreading were updated). 	ts with Confirmed Enrolment status. dy enrolled and there are changes to their enrolment de	tails (Registered Provider or Enrolment Confirmation date
If the patient's enrolment in the NES database is n	ot under the practice then instead of an update Enrolme	ent a New Enrolment will occur.
		Search

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.

A										
Web										
Search NES Gap Catch-Up History										Ø
26 Oct 2016, Run 3: 03:35 PM	Selected	Record : 19 Oct 2016 08	243 PM							
20 Oct 2016, Run 1: 09:35 AM								-		
20 Oct 2016, Run 2: 06:08 PM	NHI	Family Name	Middle name	Given Na	ame	Date of Birt	h Gender	Requests		Outcomes -
20 Oct 2016, Run 3: 06:15 PM	ZAU5687	TEST		NNNFF		10 Oct 2016	м	Enrol Patient		Patient Alread
19 Oct 2016, Run 1: 10:02 AM	GZH8646	EROPE	ST	A UROPI	E	01 Jan 1970	M	Enrol Patient		Patient Alread
19 Oct 2016, Run 2: 08:25 PM	HAR6018	ECHO-EE	В	R		01 Jan 1900	M	Enrol Patient		Patient Alread
19 Oct 2016, Run 3: 08:43 PM	GZH1587	TEST		TEST		01 Jan 1950	U	Enrol Patient		Patient Alread
19 Oct 2016, Run 4: 08:45 PM	GXA1512	А		AA		01 Jan 1900	м	Update Enrolment		Error
19 Oct 2016, Run 5: 08:47 PM	ZAU4362	TEST		NOT		04 Oct 2016	F	Enrol Patient		Enrolled
19 Oct 2016, Run 6: 08:53 PM	ZAB9051	SMITH	TEST AGAIN	NIKI		01 Jan 1970	F	Update Enrolment		Enrolled
19 Oct 2016, Run 7: 09:33 PM										
18 Oct 2016, Run 1: 03:31 PM										
18 Oct 2016, Run 2: 07:27 PM									_	```
17 Oct 2016, Run 1: 04:53 PM	EM11013	- A more recent enrolm	ent (based on local p	rocessing date) alre	eady exists in the	system				
14 Oct 2016, Run 1: 11:01 AM	Deguaste		Submitted	Accounted	Rejected/Err		Patient Already F	prolled		
14 Oct 2016, Run 2: 11:02 AM	Requests		Submitted	Accepted	Rejected/En	л 	Patient Arready E	Inclied		
14 Oct 2016, Run 3: 11:02 AM	New Enro	Iment	5	2	0		4			
14 Oct 2016, Run 4: 11:16 AM	Update Er	nrolment *	2	0	1		0			
14 Oct 2016, Run 5: 11:20 AM	Total		7	2	1		4			
14 Oct 2016, Run 6: 06:25 PM										
	* If you find	any discrepancy in the	Submitted vs Accepte	ed numbers above,	it is because wh	en this utility a	attempted an Update	Enrolment, in the NES of	latabase the p	atient was not
	enrolled wit	h the practice, hence th	e utility performed a f	New Enrolment.						
										Print

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	n			
Patient - Registered	Equal to Registered (R)				
Patient - Enrolment Status Code	Equal to Newborn Preliminary Enrolment (B)				
Patient - Enrolment Confirmed/Declined Date	Between' <export dat<="" td=""><td>e> and <todays date=""> ↓</todays></td></export>	e> and <todays date=""> ↓</todays>			
Build query in order as specified above (for	advanced users only!)	Queru Store			
Patient - Name Surname		<u>Q</u> uely Store			
Patient - Name First Name					
Patient - Nhi No		<u>B</u> un 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.

rin - Tationt Demogra	iphics Comparison		0
Medtech32	Version: 2854447, Oct 19, 2016	NHI	Version : 2854447, Oct 19, 2016
Surname	Test	Family Name	TEST
First Names	Вор	Given Name	BOP
Middle Names		Other Given Name	NHI Data held for the patient
Gender	Female	Gender	Female
Street Address	49 Big Stone Road	Street Address	49 Big Stone Road
Suburb	Brighton	Suburb	Brighton
Town / City	Dunedin	Town / City	Dunedin
Post Code	9091	Post Code	9091
Place of Birth		Place of Birth	
Date of Birth	12-Jun-2015	Date of Birth	12 Jun 2015
Date of Death		Date of Death	
NHI	HBV2418	NHI	HBV2418
Ethnicity 1		Ethnicity 1	New Zealand European (11111)
Ethnicity 2		Ethnicity 2	
Ethnicity 3		Ethnicity 3	
	View Patient Register Audit Save to Medtech32		Review & Update NHI View Details

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.

Connected Health Information Services		
National Enrolment Service >	Enrol Patient	0
Enrolment Parameters		~
Enrolment Choice Create /	Patient Provider Enrolment	
Enrolment Action O Enrol Pre-I	I Enrol (Newborn Bables)	
Health Service Type First Let	vel Services	
Patient Provider Enrolment De	tails	>
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 Permenantly 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 I have signed a Provider/PHO enrolment form	e PHO and
Patient agrees to all the above de	clarations	
View Patient Register Audit	Back	ave Reset
Select Enrolment Action confirm Loca	I Processing Date, tick Patient Declarations & click Save	

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**'.

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Connected Health Information Se	es	
₩ep		
National Enrolment Ser	e > Enrol Patient	0
Enrolment Parameters		*
Enrolment Choice	reate Patient Provider Enrolment	
Enrolment Action	Enrol Pre-Enrol (Newborn Babies)	
Health Service Type	rst Level Services	
Patient Provider Enrol	nt Details	>
Patient Demographic	ails	>
Patient Declarations		~
First Level Provider	I choose to enrol with this pr	actice as my regular and ongoing provider of first level health care services
Residing Permenantly in N	I will be in NZ at least 183 da	ays(6 Months) in the next 12 months
PHO Informed Consent	I have been informed of the I have signed a Provider/PH	PHO with which my chosen Practice is affiliated and the services available through the PHO and O enrolment form
Patient agrees to all the	ove declarations	
View Dation! Desictor Audit		
O Schol Ferderickerst Addi	Local December Data Mak Data Data	Dack Save Reset
Select Enroiment Action, cor	n Local Processing Date, tick Patient Decla	rations & 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.

Juery				
Name: NES Enrolment Check				
[able		Vhere		
Patient	-		Condition	
Fields	<u> </u>	Patient - Enrolment Confirmed/Declined Date	Between Wed 17 Aug 20	16 00:00:00 and Wed 16
Provider	_ .	Patient - Registered	Equal to Registered (R)	
Provider Registration Number		C Patient - Enrolment Status Code	In C,B	
Provider HPI Number		Patient - Enrolment ID	Is Blank	
Registered		Patient - Patient - Inactive	Is Not Ticked (Zero)	
Registered - Date		Build guery in order as specified above (for	r advanced users only!)	
WINZ No				
War Pension No	-	Select		Query Store
Ref By Address Book		Patient - Name Surname		<u> _</u> ,
Ref By ID for Mail Merge		Patient - Name First Name		
Ref By Name First Name		Patient - Enrolment Status Code		Bun Query
Ref By Name Full Name		Patient - Enrolment Confirmed/Declined Date		
Ref By Name Surname		Patient - Nhi No		Run SMS Querv
Ref By Name Title		+		
Ref By Address Home City		1		
Ref By Address Home Residence			T	⊻iew SQL
		Output data in order specified above		
				Close Help