

UPDATE SPREADSHEET USER GUIDE

The purpose of this spreadsheet is to help you work out what you might need to do on your register between now and when you next send the register away (around 6-7 weeks from the time you receive this spreadsheet).

It is in spreadsheet format to make it more flexible for you to use. You can format it how you like, insert columns, sort it differently etc.

There are 12 individual sheets and the following gives you a description of each sheet:

Note: This is intended to replace the details pages of the South Link Health 'Stage 1' and 'Stage 2' reports.

CONTENTS

The contents page identifies all the sheets in this spreadsheet.

From here, there are clickable links to each sheet. This table gives you a brief description of each sheet and how important it is for your funding.

	Title	Importance	Patients are on this sheet because
1	Not Accepted	Very High	They were rejected for funding
2	Not Geocoded	High	Address unable to be geocoded
3	Unknown Ethnicity	High	Their ethnicity is unknown
4	NHI Updates	Medium	They either have no NHI or their NHI has been updated by HealthPAC
5	CSC Changes	Info Only	CSC details have been changed by HealthPAC
6	HUHC Changes	Info Only	HUHC details have been changed by HealthPAC
7	Duplicates	High	Patients rejected for funding as they are enrolled elsewhere
8	Duplicate CSC	Low	More than one adult in the PHO has the same CSC
9	Service Before DOB	High	The patient has enrolled or visited before they were born
10	Suspect Names	High	The patient is, for example, Mickey Mouse or Joe Casual
11	Not Enrolled	Very High if in PHO for 3 years	The patient has not yet been enrolled in PHO

Note: If you are advised to remove a patient from your register, you can do this by changing their registration status to something more appropriate, or by marking them as inactive. You do not need to delete them!

1. NOT ACCEPTED

Patients are on this sheet because they were **not** accepted for funding.

Note: If you are advised to remove a patient from your register, you can do this by changing their registration status to something more appropriate, or by marking them as inactive. You do not need to delete them!

Patients are on this sheet because	Action you should take
Patient name missing or invalid	Insert both first name and surname, or remove the patient from the register
Last patient contact not within 3 years (date of enrolment and date of last contact are over three years ago)	Either remove the patient from the register or contact to re-enrol - you must have a signed form to go with the change in enrolment date
Date of birth missing or invalid	Insert date of birth, or correct the date of birth, or remove the patient from the register
Gender missing or invalid	Insert or correct the gender, or remove the patient from the register
Date of Enrolment Missing or Invalid	Insert or correct the date of enrolment, or remove the patient from the register
Duplicate patient found (patient is enrolled elsewhere)	This list is the same as Sheet 7 - see Sheet 7 for details about what to do about these patients
Deceased Patient Found	First check to make sure that this information is correct and if it is then remove the patient from the register, if it isn't then you need to contact NZHIS to inform them of the problem!

2. NOT GEOCODED

Patients are on this sheet because their address has not been able to be geocoded.

You need to check and correct the address on your register:

- Spelling of the street maybe incorrect.
- Street may be wrongly ascribed to a suburb
- Addresses for flats must be in the format of "Flat B/ 123 Something Street"
- Abbreviations may be incorrect or not there e.g. Tec instead of Terrace. Karo recommends not using abbreviations at all
- Separate house/flat name from street e.g. "123 Newtown Park Flats" and then on the next line "303 Mansfield Street" then on the next line the suburb "Newtown" NOT "123 Newtown Park Flats, 303 Mansfield Street"

For further instructions on geo-coding refer to Critchlow's web site -

<http://www.critchlow.co.nz/geostan/geocoding.htm>

3. UNKNOWN ETHNICITY

Patients are on this sheet because their ethnicity is 99 "Not Stated" - you need to identify the patient's ethnicity and update the register. Where a patient is Maori or Pacific Island the PHO will receive less money as a result of this ethnicity not being filled in correctly.

If you have used non-standard ethnicity codes at your Practice you need to check whether there is a mapping or unload facility that lets you identify how the ethnicity should be exported e.g. you might use "SO" for Somali but this should be unloaded as 53.

4. NHI UPDATES

Patients are on this sheet either because their NHI has been updated by HealthPAC, or because no valid NHI has been found by HealthPAC.

Where the NHI has been updated these updates will be made on your register automatically when you do your upload (PHO Import). This is just provided here for your information.

Where you supplied an NHI but HealthPAC did not validate it - this means that the First Name, Surname or DOB on the NHI database is different from that on your register. You may want to check that this information is correct.

Where you didn't supply an NHI and HealthPAC didn't find one, then the First Name, Surname or DOB on the NHI database is different from that on your register, or this person does not have an NHI number. You should use your normal processes for obtaining an NHI (use the HealthLink on-line look up or use the usual phone number).

5. CSC CHANGES

Patients are on this sheet either because their Community Service Card status has been rejected by HealthPAC (usually because their card expired more than three months ago) or because the card number or expiry date has been updated.

Where it has been updated these updates will be made on your register automatically when you do your upload (PHO Import). This is just provided here for your information.

6. HUHC CHANGES

Patients are on this sheet either because their High User Health Card (HUHC) status has either been rejected by HealthPAC (usually because their card has expired over one month ago) or because their number or expiry date has been updated.

Where it has been updated these updates will be made on your register automatically when you do your upload (PHO Import). This is just provided here for your information.

7. DUPLICATES

This is the list of patients who are enrolled at another practice.

You must either remove the patient from your register or contact the patient to re-enrol. You must have a signed form to go with the change in enrolment date.

If a patient does not think that they are enrolled elsewhere then the patient can ring HealthPAC on 0800 HLTH4U (0800 458 448).

8. DUPLICATE CSC

This is the list of patients for whom there are two adult patients within the PHO with the same CSC number.

You might like to check to see which adult actually holds the card, and remove the CSC number from the other patient record.

9. SERVICE BEFORE DOB

This is a list of patients who have either a date last invoice/visited or enrolment date that is earlier than their birth date.

It is recommended that you correct your records!

10. SUSPECT NAMES

This is a list of patients who probably don't exist.

Examples are Test Patient, Joe Casual, Mickey Mouse and family, Donald Duck and family - if you have other names that you think we should add to the list please let NBPH know.

11. NOT ENROLLED

Once your practice has been in a PHO for more than three years you are not entitled to submit patients that are registered but not enrolled.

This is the list of those patients and you need to enrol them as soon as possible - you should make this a very high priority!

If you have only recently joined a PHO then this matter is less urgent.

Adapted from a user guide provided by Karo Data Management.