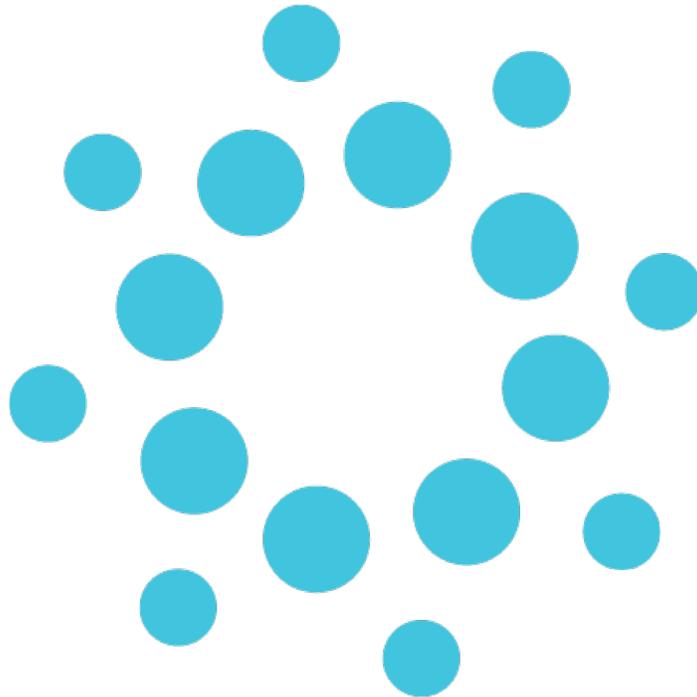# Release Notes

## Medtech32 Australia

## Patient Name Validation Utility

### August 2015

*These Release Notes contain important information for Medtech32 users.  Please ensure that they are circulated amongst all your relevant staff. We suggest that they are filed safely for future reference.*

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# Patient Name Validation Utility

## Introduction

The current versions of Medtech32 accepts the entry of patient names with special characters in it. Medicare Australia also had no explicit rules of a patients name with special characters, for the purpose of processing a claim. Therefore the Medtech32 application did not have any set rules for patient's name enforced.



However, as per the latest Medicare validation rules, Medicare will no longer process claims that have Patient/Claimant **First Name** and/or **Surname** which contains special characters other than a '**Hyphen**' or '**Apostrophe**'. In addition to this, the use of spaces is only permitted immediately <u>before or after</u> the permitted special characters i.e. '**Hyphen**' and '**Apostrophe**'.

|            |   |
|------------|---|
| O'Connor   | ✓ |
| O&Connor   | ✗ |
| O - Connor | ✗ |

## Criteria to run this Utility

- The **Patient Name Validation Utility** is able to be run by all Medtech practices - using any version of Medtech32.

- This utility is available as a file that can be downloaded from the **Medtech Global website** www.medtechglobal.com

- The Utility must be run from the Medtech Server machine.

- It is **not** a requirement for all Medtech users to log out of Medtech32 to run this utility – all <u>Medtech users can still be logged on</u> whilst the utility is running.

## Patient Name Validation Utility

In the current implementation, it is quite difficult to search for the Patients' or Claimants' having special characters in the **First Name** and/or **Surname** field in the **Patient Register** window.

Therefore, a new utility called '**Patient Name Validation Utility**' has been introduced which will display a list of those patient names within the data base that have either special characters, or extra spaces in their names.  The Export file option has also been provided to the user.

### IMPORTANT NOTE

The **Patient Name Validation** utility will only display the Patients' name with special characters from the database and **will not** automatically remove the special characters from the database.   The user will have to manually edit the special characters from the **First Name** and/or **Surname** fields in the **Patient Register** window, for each patient.
This utility has been released so that this could be **applied irrespective** of the Medtech **application version.**
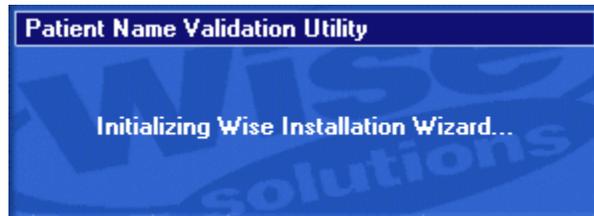
## Steps to download the utility

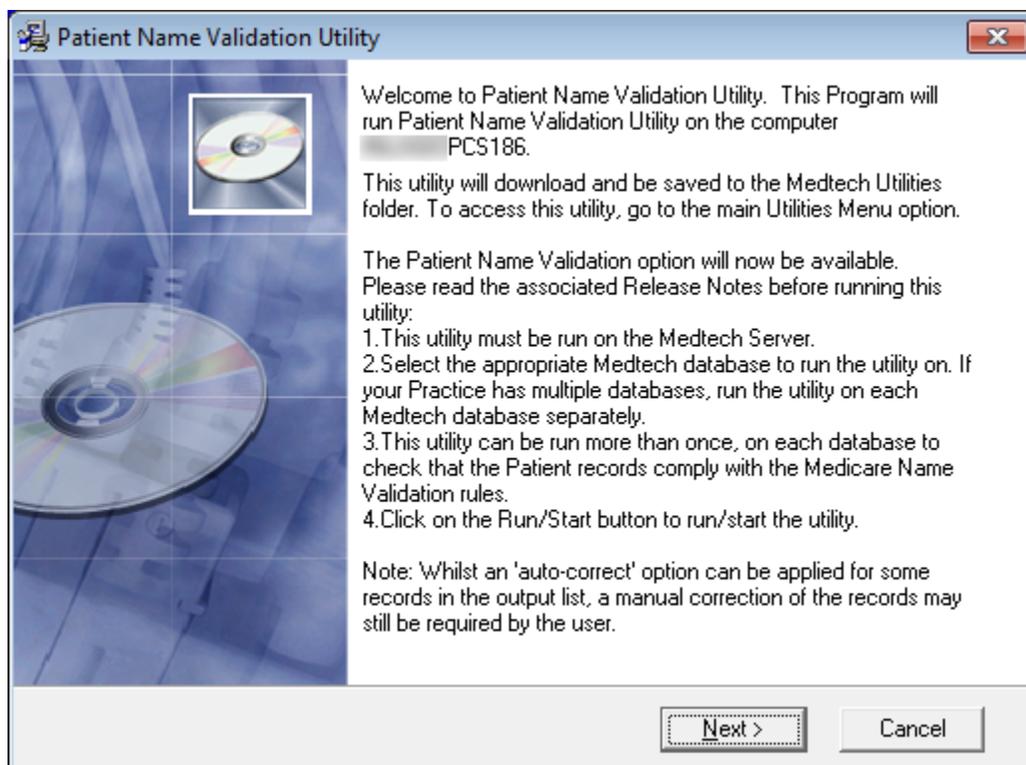Please follow the following steps below to successfully download and execute the utility.

- Visit the Medtech Global website http://www.medtechglobal.com/au/

- Select **Support → Downloads column → Medtech32 downloads → Useful Tools and Documents → Patient Name Validation Utility**

- Click on the link to download or run the utility

  1. If the **File Download Security Warning** dialogue box appears, select the **Run** option.

  2. If the **Open File Security Warning** dialogue box appears, select the **Run** option.

## Steps to run the utility

1. After selecting to run the utility, the **Patient Name Validation** utility process screen will be displayed.
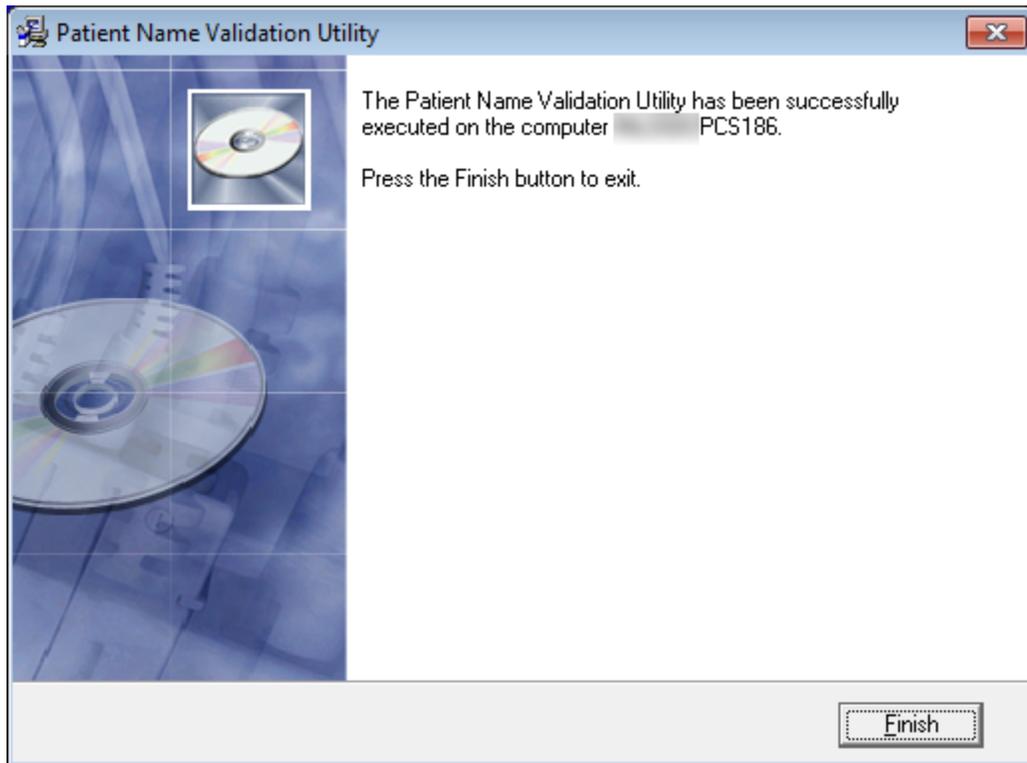


2. Once the utility has started processing, the Instruction screen will be displayed.



Please read the instructions within the screen, and then click on the **Next** button to continue.
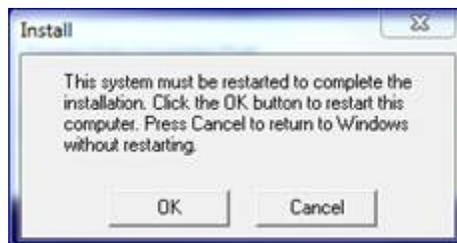
3. Once the utility has completed, the below screen will appear.



Clicking on the **FINISH** button will <u>**save** the Utility to your **Medtech32 Utilities** menu</u> option.
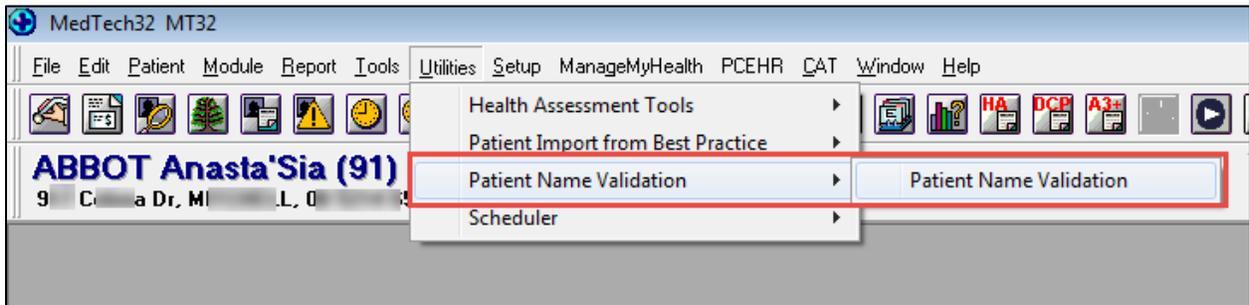
**IMPORTANT NOTE:**

Following the installation, the message box screen shown below may appear. Click on the **OK** button to restart the Server, or the **Cancel** button to return to Windows without restarting the Server.
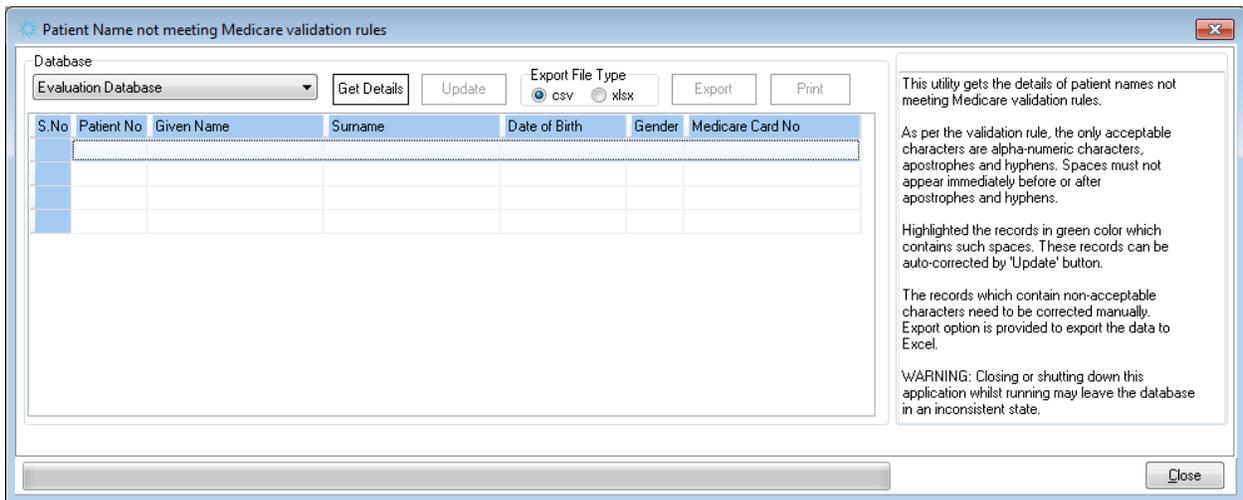


The **Patient Name Validation Utility** has now been successfully run on your computer. Once you have closed this screen, run this utility with in your **Medtech** application by following the below mentioned steps:
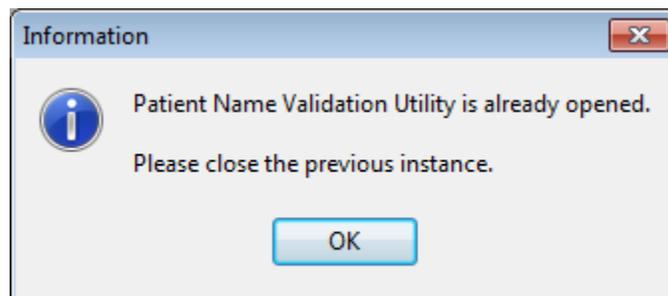
## Steps to run the utility from within Medtech32

1.  Log in to the **Medtech32** application.

2.  Go to the **Utilities** menu → **Patient Name Validation** → **Patient Name Validation**



Clicking on '**Patient Name Validation**' will open up the following screen



If the user tries to open one or more utilities at a time, the following error message will pop-up, and clicking **OK** button will bring the previously opened utility in to the work area.
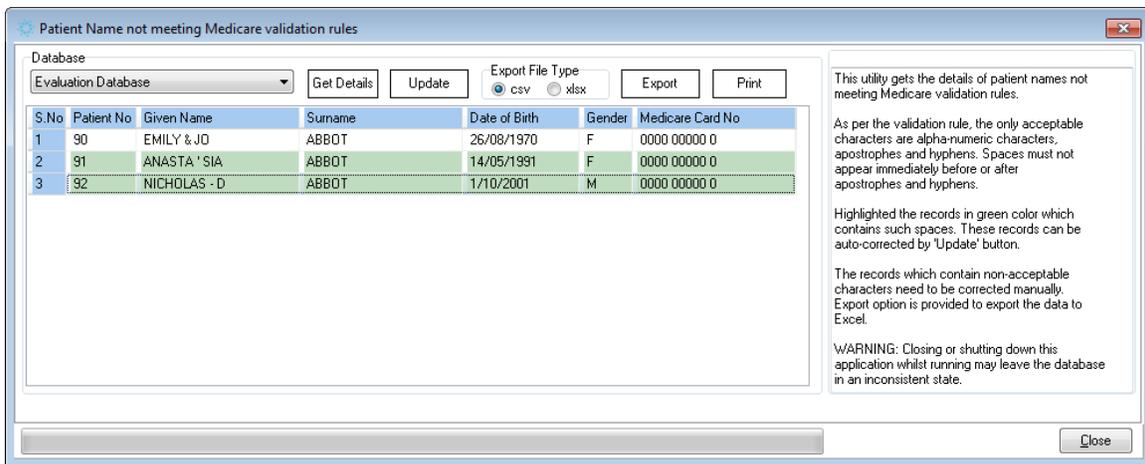
**Features of the Patient utility screen are:**

- **Database** – The last accessed Database is the default database that will display in the Database field.

  **Note**: If the practice has more than one database, then all the databases will be listed in the Database field.  Select each active database separately, to run the Utility on.

- **Get details** – After selecting the database, click on the **Get Details** button. This will populate all patients' whose **First Name** and/or **Surname** have either a special character(s) or additional spaces in the fields.
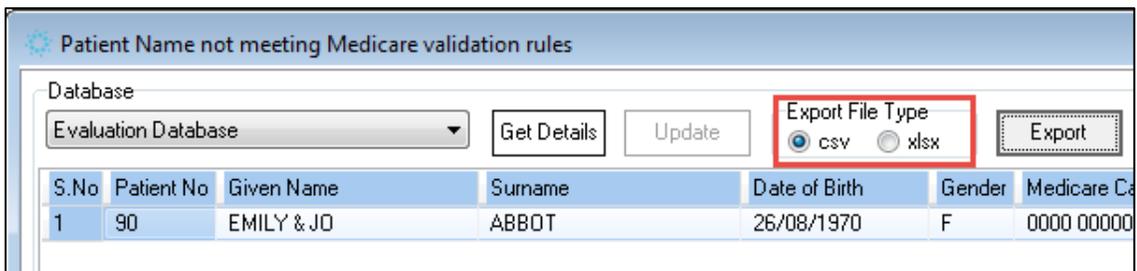


**Note:**  Those records which are able to be 'Auto Corrected' using the **Update** button, will have their row highlighted in a light **Green** colour, as per the screenshot shown above.

- **Update** – On clicking the **Update** button, all those patients' whose names have **spaces** before or after the permitted special character - '**Apostrophe**' or '**Hyphen**' will be removed automatically from the selected database. The grid will be refreshed automatically by removing the particular patient record from the list.
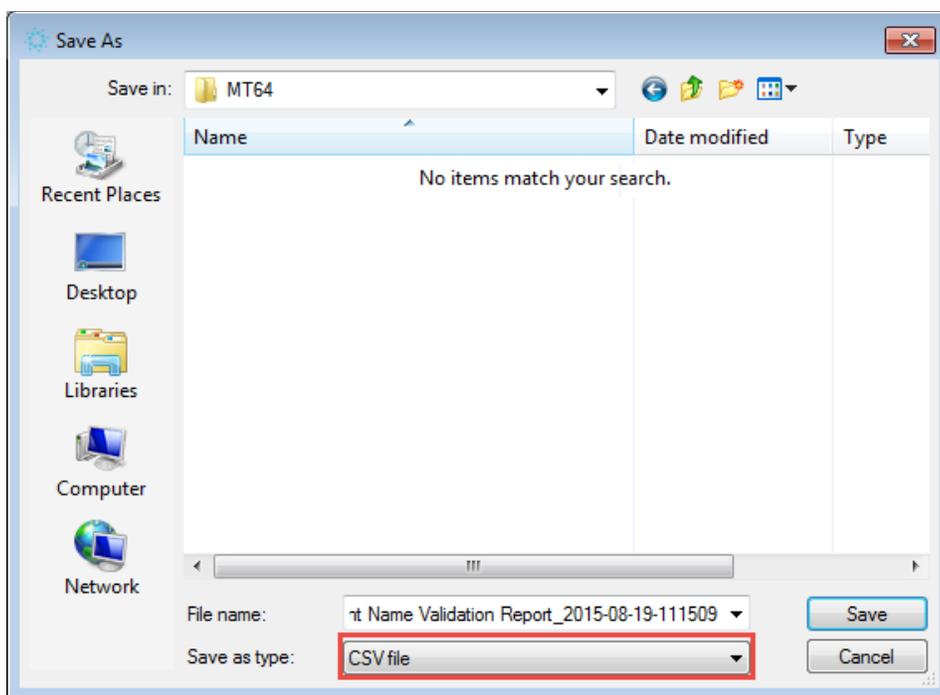
  Once the **Update** button has been selected, all those rows that were previously shown in the screenshot above, will be corrected automatically by the utility. The remaining rows listed and displayed to the user, will be those records whose details will need to be manually corrected by the user.

- **Export File Type** – When selecting this option, the user is able to export the list in either a **csv** or an **xlsx (Excel)** format. The user will be able to choose only one
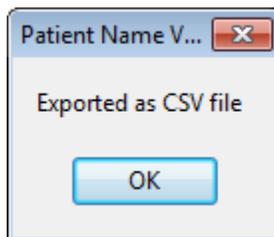
option at a time and export in the chosen file format.   To export in the other format, users will have to repeat the process.
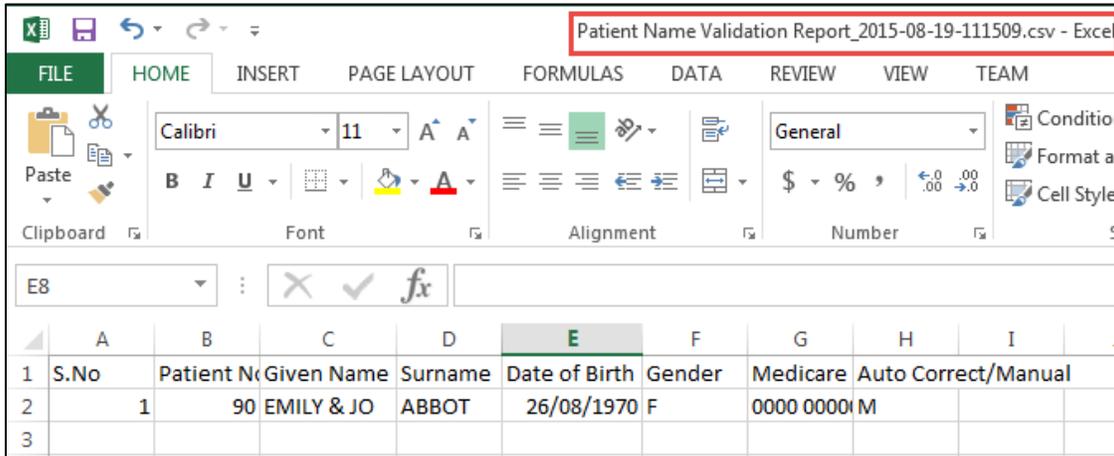


a. **Choosing** .csv file type and clicking on Export will open the **Save as** window.



b. Choose the required file location and save. A successful message will also be displayed as below:
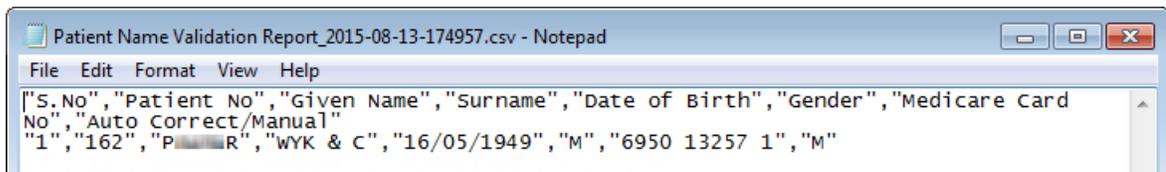


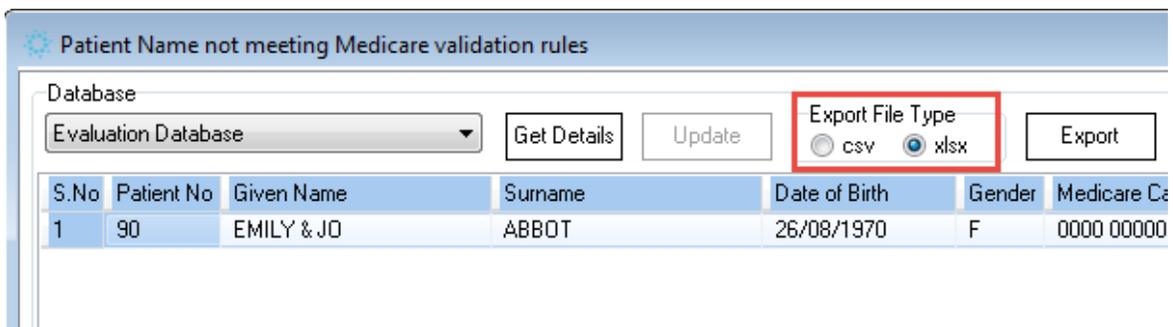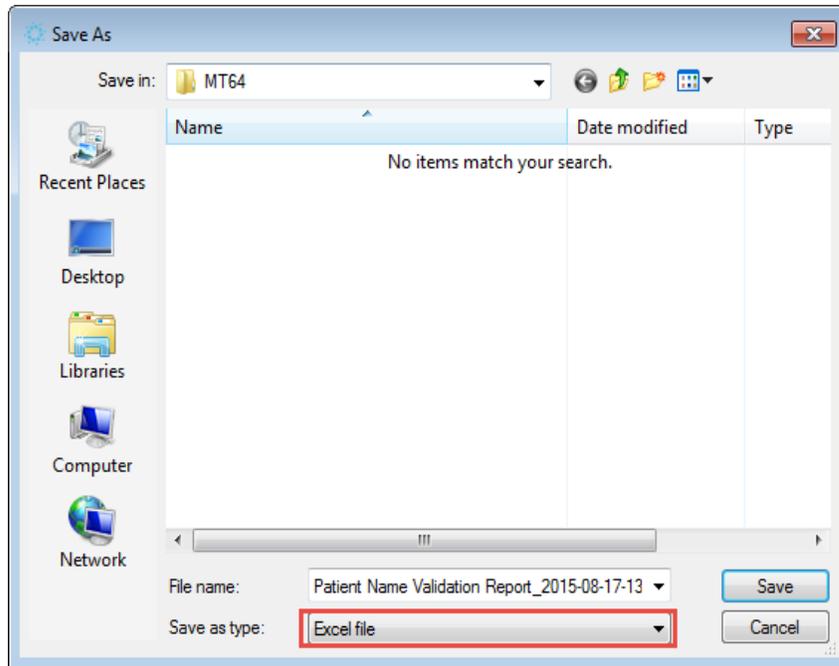The .csv file will be opened automatically and is as shown below:

**IMPORTANT NOTE**

By default the exported CSV file will be opened in Microsoft Excel only if the Server has installed with Microsoft Office, otherwise the CSV file can be opened in Notepad, as shown below:



b. Similarly when selecting the **xlsx file type** for the Export option, the user will be directed to the '**Save As**' window to select where to save the file.
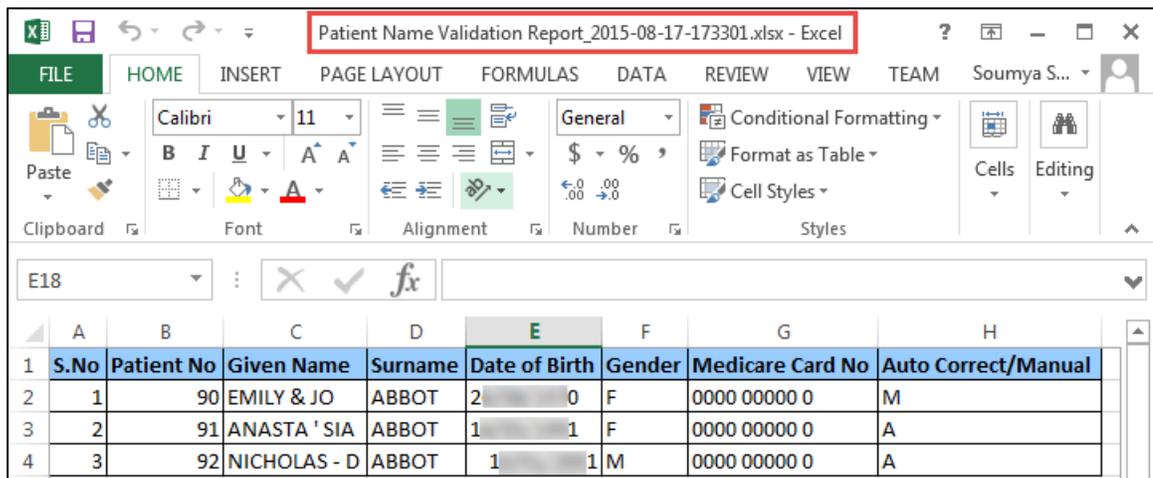


Save the file in the required location from the '**Save as**' window.

Once the export has been completed, a message box confirming this will be displayed to the user:



Clicking **OK** will open the Excel file automatically:

- **Print** – When selecting this option the output will print the list of patients, to the windows default printer.

- **Close** – Click on the **Close** button to close the utility.

Repeat the steps above on each of the databases, as applicable to identify those patients' records that need to be updated to ensure that all patient records are compliant with the Medicare validation rules.

_**Note**_: this utility can be run multiple times, per databases.

Should you require any assistance running the utility, please do not hesitate to contact the **Medtech Helpdesk** on Tel: **1800 148 165 → Option 1,** or
Email: support@medtechglobal.com.