Release Notes
Medtech32

Version 22.16 – Build 5963
Community Service Card and Under 14 Zero Fees

(November 2018)
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CSC Patient Register Enhancements

Changes to the existing Community Service Card view

**Module ► Patient Register ► Patient Details Tab**

A number of changes have been made to the Patient Register screen in Medtech32 to support the introduction of Community Service Card (CSC) entitlements.

The existing Community Service Card (CSC) Holder fields, as well as a new Entitlement Status, are now located under a new ‘Community Service Card’ sub heading in the Patient Register screen.

The existing High User Health Card (HUHC) fields have been relocated and can now be found under the sub heading ‘High User Health Card’.

Within the new Community Service Card section of the patient register, the following options are now available:

The **CSC Sync** button ( ), to the right of the Community Service Card sub-heading, when clicked, will retrieve the latest CSC details for the patient from NES as a manual process ie: when adding a new patient into Medtech32.

The **CSC History** button ( ) to the right of the CSC Sync button, when clicked, will display an enhanced CSC History view.
The Help Bubble ( ) to the far right of the CSC History button, provides help information regarding the newly implemented CSC changes.

**Family CSC Copy, Swipe CSC and Family Add**

As a result of the new CSC entitlement changes the ‘Family CSC Copy...’ and ‘Swipe CSC...’ functionality, have been removed from the Patient Register screen, Patient Register menu and Patient Search window.

CSC information will also no longer be copied to new Family Members when using the ‘Family Add’ option within the Patient Search screen.

**Retrieving CSC Information**

**Module ► Patient Register ► Patient Details Tab**

If the text within the Community Service Card section of the Patient Register is displayed in red the displayed CSC details have been added manually and a retrieval of the CSC details from NES has not yet been successfully performed.

**Please Note:** On upgrade to the Medtech32 Version 22.16 release, all existing patient CSC information will be retained, and will be displayed in red text as it is yet to be retrieved and validated via the NES system.

![](image)

An auto retrieval of the CSC information for a patient will be performed when the patient is placed on the palette (or manually when clicking on the CSC Sync button), this will result in the displayed CSC text changing from red to black, indicating that the CSC details have been successfully retrieved from NES, and all of the CSC fields will become not editable.

![](image)

**Please Note:** There will be only one retrieval carried out for each patient placed onto the palette during the day.

The following are the possible views that could be presented, based on the CSC information returned from NES:

1. **Community Service Card Holder View** (if an active CSC is returned from NES)
The Card Type field will be populated with ‘CSC Holder (1)’;
The Entitlement Status will be populated with ‘Yes’;
The Number, Start Date and Exp(iry) will be populated with information from NES;
Last retrieved on text will be displayed, which indicates when that patient’s CSC details were last successfully retrieved from NES;
A ‘Change CSC’ button will be displayed.

2. Non Community Service Card Holder View (if no active CSC is returned from NES)

If the retrieval of CSC details for a patient from NES returns no active CSC then:

- The Card Type field will be populated with ‘Non CSC Holder (3)’;
- The Entitlement Status will be populated with ‘No’;
- The Number, Start Date and Exp(iry) will be blank;
- Last retrieved on text will be displayed;
- An ‘Add CSC’ button will be displayed.

3. Dependant View (if Caregiver CSC information is returned from NES)

If the retrieval of NES details for a patient from NES returns Caregiver details then:

- The CSC Holder view will change to the ‘Dependant view’;
- The returned Caregiver’s details will be listed within the Caregiver grid;
- The Last retrieved on text will be displayed;
- An ‘Add Caregiver’ and ‘Remove Caregiver’ button will be displayed.
Updating CSC information

Module ► Patient Register ► Patient Details Tab

Scenario 1: Patient has presented a CSC but no CSC information was returned from NES

If a patient has presented a CSC but there was no CSC information returned from NES, then the ‘Add CSC’ button can be used to associate the presented CSC with that patient’s identity.

Clicking on the ‘Add CSC’ button will open the ‘Add CSC’ screen.

From the ‘Add CSC’ screen a CSC can be entered into the ‘Add CSC Number’ field or, if that patient has any historic CSC details within their CSC history which have not expired, then these will be displayed within the drop down for selection.

Clicking on the ‘Submit’ button once the CSC number has been entered or selected will initiate a check with the NES for the patient CSC details.

If the submitted addition is successful then the new CSC details will be updated into the patient’s Patient Register screen.

Scenario 2: Patient has presented a CSC but different CSC information was returned from NES

If a patient has presented a CSC but different CSC information has been returned from NES, then the ‘Change CSC’ button can be used to change from the current CSC associated to that patient’s identity, to the CSC information presented by the patient.

Clicking on the ‘Change CSC’ button will open the ‘Change CSC’ screen.

From the ‘Change CSC’ screen a CSC can be entered into the ‘Change CSC To’ field or, if that patient has any historic CSCs within their CSC history which have not expired, then these will be displayed within the drop down for selection.
Clicking on the 'Submit' button once the CSC number has been entered or selected will initiate a check with the NES for the patient CSC details.

If the submitted change is successful then the new CSC details will be updated into that patient’s Patient Register screen.

**Scenario 3: Patient has advised that they do not have a CSC but one is associated to their identity**

If a patient has indicated that they do not have a CSC, but there is one associated with their patient record, then the ‘Change CSC’ button can be used to remove the current CSC associated to the patient.

Clicking on the ‘Change CSC’ button will open the ‘Change CSC’ screen.

From the ‘Change CSC’ screen select the ‘Remove CSC’ option from the dropdown list in the ‘Change CSC To’ field.

Clicking on the ‘Submit’ button once the Remove CSC option has been selected will present a confirmation box to the users.
Clicking on ‘Yes’ the change will be submitted through to the NES and if the submitted removal is successful then the CSC information will be dissociated with the patient and will be removed from the patient’s Patient Register.

The below information message will be displayed to the user.

![Information dialog](image)

Clicking ‘Ok’ will return the user to the Patient Register screen.

Clicking ‘No’ in the confirmation box, will return the user to the Change CSC screen and no changes will be completed.

Adding and Removing Caregivers

**Module ► Patient Register ► Patient Details Tab**

**Adding Caregivers**

The ‘Add Caregiver’ button can be found on either the non CSC holder view for a patient who is aged between 0-18, or from the Dependant view of a patient who has an existing Caregiver associated with their patient record.

![Community Service Card](image)

Clicking on the ‘Add Caregiver’ button will display the ‘Add Caregiver’ screen where a user can associate Caregivers with a Dependant.
From the ‘Add Caregiver’ screen there are two options available which will facilitate the addition of a Caregiver who is either ‘At the Practice’ or is ‘Not at the Practice’.

**Scenario 1: If the Caregiver for the patient is registered ‘At the practice’**

If the patient’s caregiver is registered ‘At the Practice’ then searching for a Caregiver can be performed by selecting the ‘At the Practice’ option, and clicking the ellipses button next to the ‘Caregiver’ field.

The patient search screen will be displayed, allowing you to select from the practice database the Caregiver for the patient.

Clicking on the ‘Submit’ button once the Caregiver has been selected in the Patient Search screen will initiate a check with the NES.

If the addition of the Caregiver is successful then the Caregiver information will be associated with the patient and will be added to the Caregiver list in the Dependant view within the patient’s Patient Register screen.
Scenario 2: If the Caregiver for the patient is 'Not at the practice'

If the Caregiver does not have a patient record at the practice then the ‘Not at the Practice’ option can be selected and used to enter and submit the external Caregiver’s NHI and CSC numbers.

If the Caregivers NHI and/or CSC numbers are known:

If the NHI and/or CSC numbers are known, then enter them into the relevant fields on the screen, and click on the ‘Submit’ button.

Clicking on the ‘Submit’ button once the Caregiver details have been entered into the ‘Add Caregiver’ screen will initiate a check with the NES.

If the addition of the Caregiver is successful then the Caregiver information will be associated with the patient and will be added to the Caregiver list in the Dependant view within the patient’s Patient Register.

The following prompt will be displayed to the user:
Clicking on the ‘Ok’ button will return the user to the Patient Register where the Caregiver details will be displayed.

Please Note: Any retrieved or added caregivers that do not have a patient record from the practice’s database will have the Caregiver’s name displayed as unavailable within the Dependant view in the patient’s Patient Register. This will usually occur when the Caregiver is found via the ‘Not at this practice’ option.

If the Caregivers NHI and/or CSC numbers are NOT known:

If either of the NHI and/or CSC numbers are unknown, then the NHI button can be clicked to search for a Caregiver from the NHI database.

Clicking the NHI button displayed when the ‘Not at the Practice’ option is selected in the ‘Add Caregiver’ screen will open the Caregiver Search screen.
Enter the relevant identity information for the external Caregiver and select the ‘Search’ button to start the search within the NHI database.

When the results for the search have been identified for the patient’s Caregiver they will be presented to the user in the Caregiver Search Results screen.

Click the ‘Retrieve’ button, located at the bottom right of the screen, or double click the selected record to select the Caregiver for the patient. You will be prompted with the message ‘CSC card details retrieved successfully’ if the caregiver information has been retrieved.

Click on the ‘Close’ button to return back to the ‘Add Caregiver’ screen.
On the ‘Add Caregiver’ screen the selected external Caregiver’s CSC and NHI numbers will be populated in the relevant fields ready for submission.

Clicking on the ‘Submit’ button once the Caregiver details have been entered into the ‘Add Caregiver’ screen will initiate a check with the NES.

If the addition of the Caregiver is successful then the Caregiver information will be associated with the patient and will be added to the Caregiver list in the Dependant view within the patient’s Patient Register.

Please Note: Any retrieved or added caregivers that do not have a patient record from the practice’s database will have the Caregiver’s name displayed as unavailable within the Dependant view in the patient’s Patient Register. This will usually occur when the Caregiver is found via the ‘Not at this practice’ option.
Remove Caregivers

The ‘Remove Caregiver’ button can be found within the Dependant view of a patient who has an existing Caregiver associated with their patient record.

Selecting any existing Caregiver from a patient’s Caregiver list will allow you to remove the selected Caregiver by pressing the ‘Remove Caregiver’ button.

![Community Service Card](image)

Clicking on the ‘Remove Caregiver’ button will present a confirmation message to the users

![Confirm](image)

Clicking on ‘Yes’ the change will be submitted through to the NES and if the submitted removal is successful then the caregiver will be removed from the Dependant view in the Patient Register.

The below information message will be displayed to the user.

![Information](image)

Clicking ‘Ok’ will return the user to the Patient Register screen.

![Community Service Card](image)

Clicking on ‘No’ in the confirmation box, will return the user to the Patient Register screen and no changes will be completed.
Community Service Card Service Outage

Module ► Patient Register ► Patient Details Tab

In the event that Medtech32 cannot communicate with the NES CSC service the following will occur on all of the relevant CSC screens:

- The wording ‘Unable to update CSC information’ will be displayed in red text;
- All Add, Change and Remove buttons will be hidden;
- The Card No, Start and Expiry fields will be enabled allowing you to edit a CSC manually.
Display of the CSC Entitlement Status

The CSC entitlement status for a patient will be represented by the following symbols:

- **CSC** or **CSC** = **Retrieved CSC Holder** (Entitlement Status = Yes)
- **CSC** or **CSC** = **Retrieved Dependant** (Entitlement Status = Yes)
- **CSC** = **Non Retrieved CSC Holder** (Entitlement Status = N/A)
- **<blank>** = **Non CSC Holder** (Entitlement Status = No)

Patient Palette

The patient’s current CSC Entitlement status will be displayed to the right of the registration status on the Patient Palette.
Patient Search

A new ‘CSC Entitlement’ column has been added to the Patient Search window which will display the patient’s current CSC entitlement status.
Appointment Books

Module ► Appointments ► Appointment Book 1/2/3/4

A new ‘Entitlements’ column has been added to the Appointment Book which will display the patient’s CSC entitlement status.

The existing orange colour (Enrolment) and pink colour (Casual), that currently appear from the ‘Stat’ column when a patient does not have an enrolment, will now be displayed from the ‘Entitlements’ column.

Please Note: Due to the insertion of the new Entitlements column into the appointment book, a user may need to extend the screen in the appointment book slightly the first time opening after upgrade it if all columns are not fully visible. Please check that you have ‘Remember screen positions’ selected in the staff setup for a user to ensure that the new position will be retained on closing and opening the appointment book screen.
CSC Auditing and Enhancements to the CSC History Module

Module ► Patient Register ► Patient Details Tab

Any changes made to any patient CSC details will be audited and displayed within the new CSC History Module which can be accessed via the shortcut CSC History button to the right of the blue CSC Sync button.

All expired and removed CSC records will be captured within the existing CSC History window, and will be displayed with three new additional fields:

- Will be displayed next to the card details which were retrieved from NES
- Date Added
- Card Type

A new Screen Audit – ‘CSC Audit’ is can also be accessed via the Audit tab > Screen Audit function within the patient Register screen.
Other CSC Related Enhancements

Query Builder

Tools ► Query Builder ► Patient table

Additional Community Service Card (CSC) fields have been added to the Query Builder Patient table to assist with querying Community Service Car information for patients.

The following CSC fields are now available within the Query Builder:

- Patient - CSC Card No (existing)
- Patient - CSC Expiry Date (existing)
- Patient - CSC Start Date (existing)
- Patient - CSC Entitlement Status (new)
- Patient - CSC Card Type (new) - the CSC Card Type will provide options for CSC Holder (1), Non CSC Holder (3), and Dependant (1)

Updates to the Capitation Reallocation Amounts table

Setup ► Location ► Location Settings ► Reports tab

The Age Ranges that are above 14 years of age have been split into three funding categories:

- 1 = Community Service Card Holder / Dependant
- 3 = Non Card Holder
- Z = High User Health Card Holder

Practices must fill in the correct funding amounts for the newly split funding categories. By default the new funding categories will have the same values as the original age range in which it was split off from.
The Internal GMS and Claw Back reports have been updated to reflect the new funding categories.

![Image of a table showing capitated claim count by age range]

<table>
<thead>
<tr>
<th>Age Range</th>
<th>Funding</th>
<th>Qty</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>45+(A1)</td>
<td>$31.34</td>
<td>1</td>
<td>31.34</td>
</tr>
<tr>
<td>45+(A3)</td>
<td>$31.34</td>
<td>1</td>
<td>31.34</td>
</tr>
<tr>
<td>45+(B1)</td>
<td>$31.34</td>
<td>1</td>
<td>31.34</td>
</tr>
<tr>
<td>25-44(A1)</td>
<td>$45.34</td>
<td>2</td>
<td>90.68</td>
</tr>
<tr>
<td>25-44(A3)</td>
<td>$45.34</td>
<td>2</td>
<td>90.68</td>
</tr>
<tr>
<td>25-44(A2)</td>
<td>$45.34</td>
<td>2</td>
<td>90.68</td>
</tr>
<tr>
<td>14-24(J1,A1)</td>
<td>$70.50</td>
<td>1</td>
<td>70.50</td>
</tr>
<tr>
<td>14-24(J2,A2)</td>
<td>$70.50</td>
<td>1</td>
<td>70.50</td>
</tr>
<tr>
<td>6-13</td>
<td>$64.82</td>
<td>6</td>
<td>388.92</td>
</tr>
<tr>
<td>0-5</td>
<td>$50.45</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Unspecified</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Grand Total</td>
<td>18</td>
<td></td>
<td>938.48</td>
</tr>
</tbody>
</table>
Practice Not Registered with NES

If your practice is ‘Not Registered’ for NES, the changes to the Patient Register made for the display of the Community Service Card information will still be present within the screen.

There will be no connectivity available to the NES, and a practice will have the ability to manually enter the CSC information for a patient directly into the screen.

- The Card Type will allow a user to select ‘CSC Holder (1)’ or ‘Non CSC Holder (3)’;
- The Number, Start Date and Exp(iry) will be enabled to allow the user to populate CSC information;
- The Entitlement Status will be disabled but will not be editable or show any status for the patient;
- Last retrieved on will not display any date or time information as the card has not been validated with the NES;

Clicking on the ‘CSC Sync’ button will prompt with the following message:

```
Information
Connected Health Information Services is deactivated.
Please contact your system Administrator to activate again.
```

The references to patients CSC Entitlement status will be displayed in the Patient Search screen in red text and also on the Palette in red text as the CSC information has not been validated with the NES.
Practice is Not Opted In to the CSC Initiative

If your practice is not currently Opted In to the CSC initiative you can still collect CSC information for patients, and add caregivers to patients using the capability available in the Medtech32 Version 22.16 release.

The only thing that would be done differently by a practice who is Not Opted into the CSC initiative yet would be the amount you set for the GMS Adjustment for patients who have a CSC entitlement – i.e. the standard service fee your practice sets for a CSC holder without a reduction to offset the additional capitation funding being received by the practice.

Collecting the CSC information the same way as a practice who is Opted In to the CSC initiative means that when you are ready to Opt In to the CSC initiative all that will be necessary is to complete a GMS Adjustment to set the reduced rate for the patients with the CSC entitlement.
Patient does not have an NHI

If your patient does not have an NHI entered, the changes made to the Patient Register for the display of the Community Service Card information will still be present within the screen and a practice will have the ability to manually enter the CSC information for a patient directly into the screen.

- The Card Type will allow a user to select ‘CSC Holder (1)’ or ‘Non CSC Holder (3)’;
- The Number, Start Date and Exp(iry) will be enabled to allow the user to populate CSC information;
- The Entitlement Status will be disabled but will not be editable or show any status for the patient;
- Last retrieved on will not display any date or time information as the card has not been validated with the NES;

The references to patients CSC Entitlement status will be displayed in the Patient Search screen in red text and also on the Palette in red text as the CSC information has not been validated with the NES.
Patient does not have a matching NHI on NES

If your patient does not have a matching NHI in the NES then when using the ‘Add CSC’ or ‘Add Caregiver’ functions the following message will be displayed to the user.

When this message is received, you will need to confirm that the NHI is correct for the patient.

This can be done by completing the identity validation with the NES through the standard process, which will allow you to subsequently complete the Add CSC or Add Caregiver functions.
Zero Fees for Under 14's

Utilities ► Miscellaneous ► Activate GMS under 14 changes

From the 1st of December 2018 the zero fees for under 13’s will be extended to include under 14 year olds.

<table>
<thead>
<tr>
<th>Existing GMS Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient Category</td>
</tr>
<tr>
<td>---------------------</td>
</tr>
<tr>
<td>Y</td>
</tr>
<tr>
<td>C</td>
</tr>
<tr>
<td>J</td>
</tr>
<tr>
<td>A</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Updated GMS Categories</th>
</tr>
</thead>
<tbody>
<tr>
<td>(valid from the 1st of December 2018)</td>
</tr>
<tr>
<td>Patient Category</td>
</tr>
<tr>
<td>---------------------</td>
</tr>
<tr>
<td>Y</td>
</tr>
<tr>
<td>C</td>
</tr>
<tr>
<td>J</td>
</tr>
<tr>
<td>A</td>
</tr>
</tbody>
</table>

In order to facilitate for this change the ‘Activate GMS Under 14 changes’ utility will perform the following:

- Change the assigned GMS code from J to C for all patients who are older or equal to 13 years of age, but are younger than 14 years of age;
- Update the GMS Utility tool;

This utility must be run in order to activate the GMS under 14 changes either after close of business on the 30th of November 2018 (Friday) or before the start of business on the 1st of December 2018 (Saturday).

If the ‘Activate GMS under 14 changes’ utility was not processed after close of business on the 30th of November 2018 then on the 1st of December 2018 the utility will be automatically run when the first user logs into Medtech32 for the day.
GMS Adjustment for Service Fee Changes

Practices are reminded that a GMS Adjustment should be completed for all service fees that are impacted by the changes in the additional capitation funding for CSC patients received by practices Opted In to the CSC initiative, and also the Under 14 Zero Fees initiative.

A new GMS Adjustment spreadsheet and ‘How to complete a GMS Adjustment in Medtech32’ webinar is available in the resources section of the Medtech Website and Insight Customer Portal.

You can access the new GMS Adjustment spreadsheet, user guide and webinar in the following locations:

**Medtech Website:**

**Insight Customer Portal:**
https://insight.medtechglobal.com/downloads/medtech32-resources/
Resources

The following resources are available to practices to assist with understanding of the changes in Medtech32 for this release:

Release Notes

You can access the Release Notes for the CSC and Under 14 changes in the following locations:

Medtech Website:  

Insight Customer Portal:  

Knowledge Base Articles

Available on the Insight Customer Portal at the following location  
https://insight.medtechglobal.com/knowledge-base/ use the following keywords:

‘csc’ – for all articles related to changes in this update related to CSC  
‘u14’ – for all articles related to changes in this update related to Under 14 Zero Fees  
‘adjustment’ – for all articles related to making GMS adjustment changes

GMS Adjustment

A new GMS Adjustment spreadsheet, user guide, and ‘How to complete a GMS Adjustment in Medtech32’ webinar are available in the resources section of the Medtech Website and Insight Customer Portal.

You can access the new GMS Adjustment spreadsheet, user guide and webinar in the following locations:

Medtech Website:  

Insight Customer Portal:  
https://insight.medtechglobal.com/downloads/medtech32-resources/

Webinars

Webinars are available to walk through and demonstrate the new functionality for CSC and Under 14 changes for your understanding.

You can access the new CSC and Under 14 webinar in the following locations:

Medtech Website:  

Insight Customer Portal:  
https://insight.medtechglobal.com/downloads/medtech32-resources/
For further information on these new features, or any other queries regarding the changes in this release, please contact Medtech Support via:

- **Insight**: Register for the Insight Customer Portal at [https://insight.medtechglobal.com/](https://insight.medtechglobal.com/) and Log a Support Ticket
- **Online Chat**: [www.medtechglobal.com](http://www.medtechglobal.com)