

Evolution pre-release documentation Funding switchover to NES

Bulk Enrolment Synchronisation and CBF Switchover Scheduler

Summary of Change

Bulk synchronisation of all patients with an enrolment status will be completed to ensure that the patient data held in Evolution and the NES enrolment records are in sync, followed by an automatically scheduled switch-over to Funding based on NES enrolment records.

CBF Switchover Overview

The CBF Switchover will perform the following operations for all Active Patients with an NHI Number and an Enrolment Status recorded in the Patient Register:

- Update missing or conflicting enrolment details
- Update missing or conflicting Practitioner CPN and Facility ID numbers corresponding to the updated enrolments
- If there is more than a year's difference between the NES and PMS QED for a patient, the NES QED will be updated with the most recent QED value from the PMS.
- The Funding details for a patient will be derived from a combination of the synchronised enrolment details and the existing funding details.
- The Funding Details section of the Patient Register will be confirmed and the funding details font colour changed from red to black.

CBF Switchover Tracker

The CBF Switchover tab which will be added to the NES Setup window allows you to track the progress of the automated CBF switchover process, update the list of staff members who will receive Staff Tasks advising of the outcome of the switchover when completed and to access the CBF Switchover log which contains any errors and a summary of each switchover period completed.

The Staff Task To field will default to all staff members who have access to either the NES Notifications Inbox or NES Setup module or both at the time of upgrading.

The following are the possible switchover Statuses that will be displayed over the course of the switchover process:

- **Scheduled to run:** A processing time slot has been allocated.
- **Switchover in Progress:** The switchover has been initiated.
- **Completed:** If the scheduled process completes with no Exceptions or Processing Errors
- **Completed (Exceptions: <#>):** If the scheduled process completes with Exception Errors
- **Completed (Processing Errors: <#>):** If the scheduled process completes with Processing Errors
- **Completed (Exceptions: <#>; Processing Errors: <#>):** If the scheduled process completes with Exceptions and Processing Errors.

Once the CBF switchover process has completed, a staff task will be generated for each staff member listed under the **Staff Task To** field from the NES Setup screen. This Staff Task will inform the recipients that the switchover has completed and will advise if there are any exceptions that need to be reviewed.

CBF Switchover Exceptions

During the switchover any patients that have a different enrolment status within the PMS to that which is recorded within NES will be logged as an exception. The following are the possible enrolment exception scenarios that may be encountered:

- **PMS: Enrolled or Pre-Enrolled | NES: No Enrolment:**
A Notification will be created and displayed from the NES Notification Inbox, advising of this exception and the recommendation to perform a Full Enrolment/Pre-enrolment from NES for this patient.
- **PMS: Unenrolled | NES: Enrolled or Pre-Enrolled:**
The Enrolment or Pre-enrolment will be **automatically ended** and a Notification will be created and displayed from the NES Notification Inbox advising of this exception and that you need to review the action taken.
- **PMS: Enrolled | NES: Pre-Enrolled**
A Notification will be created and displayed from the NES Notification Inbox, advising of this exception and the recommendation to perform a Full Enrolment from NES for this patient.
- **PMS: Pre-Enrolled | NES: Enrolled**
A Notification will be created and displayed from the NES Notification Inbox, advising of this exception and the recommended actions to review and update the enrolments to ensure they are in sync.

Important Note: It is important that these notifications are reviewed and acted on as the funding for these patients will be based off of the NES enrolment not the PMS enrolment details so may not be assigning the correct funding details.

Release Documentation

Full release notes and a webinar will be provided, along with a series of FAQ's in the Insight Knowledge Base at the time of release of these changes for all Evolution practices.

Practices should ensure that all relevant staff within the practice are aware of the changes made to the Evolution application to support the Ministry of Health Funding switch-over to NES.

For further information please contact Medtech Support via:

- **Insight:** Register for the Insight Customer Portal and Log a Support Ticket at <https://insight.medtechglobal.com/>
- **Online Chat:** www.medtechglobal.com