

Evolution pre-release documentation Funding switchover to NES

Patient Enrolment / Funding Enhancements

Summary of Change

Enhancements will be made to the existing Evolution enrolment functionality to ensure that the enrolment information entered for a patient remains in sync with the NES.

Enrolment and Funding fields will be automatically updated when an enrolment is created, ended or updated via NES, and once an Enrolment ID has been retrieved from NES, the Enrolment Status, Date Confirmed/Declined, and Method of Enrolment fields will be placed into a Read-Only state.

Enrolment maintenance buttons will provide the ability to manage a patient's enrolment directly from the Patient Register, including functions for Re-enrol, End Enrolment, Full Enrolment, Sync, and Show all Data. This means that a user will not have to navigate to the NES maintenance screens when they need to re-enrol or end a person's enrolment.

Enrolment Enhancements

Changes to Patient Enrolment section in Patient Register

Changes will be made to the Enrolment section of the Patient Register and tools to simplify the maintenance of existing patient enrolments and to ensure that the NES and PMS enrolment records remain in sync when an enrolment record is altered.

The following buttons and fields will be added to the Enrolment/Funding tab in the Patient Register:

- **Re-enrol** button;
- **End Enrolment** button;
- **Full Enrolment** button;
- **Sync** button;
- **Re-enrolment Date** field;
- **Enrolment End Reason** field;

Once a patient's enrolment has been synchronised with NES (has an Enrolment ID populated), all Enrolment fields, including the Enrolment Status, Date Confirmed/Declined and Method of Enrolment fields will be disabled. Any further changes to the enrolment, that are needing to be actioned, can be processed via the new enrolment maintenance buttons.

If changes to the **Enrolment Status** or **Date Confirmed** are saved in the Patient Register for enrolment records that haven't been synchronised with NES (does not have an enrolment ID populated), an '**enrolment details have been updated**' warning message will be presented.

*The enrolment details have been updated which requires synchronisation with NES.
Please select the appropriate buttons given below to proceed further.*

The practice will be able to **Enrol** the patient or **View Enrolment** for the patient from within the warning message presented.

Please be aware that the **Gap Catch-Up Utility** will also be removed as part of this update.

Re-enrolment button functionality

The Re-enrol button allows you to Re-enrol a patient directly from the patient register.

The **Re-enrol** button will become active when a patient has an enrolment status of **Confirmed Enrolment (C)** or **Newborn Preliminary Enrolment (B)** and the Enrolment has been **synchronised with NES** (Enrolment ID populated).

On pressing the **Re-enrol button**, the **'Re-enrol Patient'** window will open. To proceed to **Re-enrol** the patient you must add a value into the **'Date Confirmed'** and **'Method of Enrolment'** fields so that the **Yes** button becomes active to allow you to complete the re-enrolment process.

Once the Re-enrol request has been successfully submitted to NES the Enrolment information will be updated in the PMS along with the **Date Confirmed** and **Method of Enrolment** selected.

End enrolment button functionality

The **End Enrolment** button allows you to **End** a patient's Enrolment directly from the Patient Register.

The **End Enrolment** button becomes active when a patient has an enrolment status of **Confirmed Enrolment (C)** or **Newborn Preliminary Enrolment (B)** and the Enrolment has been **synchronised with NES** (Enrolment ID populated).

On pressing the **End Enrolment button**, the **'End Patient's Enrolment'** window will open. To proceed to end the patient's enrolment then you must add a value into the **'Enrolment End Reason'** and **'Registration Status'** fields so that the **Yes** button becomes active for you to complete the end enrolment process.

Note: The Registration Status of the patient will default to the pre-configured registration value associated with the selected **'Enrolment End Reason'** located from the NES Setup window.

Once the End Enrolment request has been successfully submitted to NES the relevant Enrolment information will be updated in the PMS along with the **Enrolment End Reason** and **Registration Status** selected.

Full enrolment button functionality

The **Full Enrolment** button allows you to change a Newborn Preliminary Enrolment to a Full Enrolment directly from the Patient Register.

The **Full Enrolment** button becomes active when a patient has an enrolment status of **Newborn Preliminary Enrolment (B)** and the Enrolment has been **synchronised with NES** (Enrolment ID populated).

On pressing the **Full Enrolment button**, the **'Patient Full Enrolment'** window will open. To proceed with the **Full Enrolment** then you must add a value into the **'Date Confirmed'** and **'Method of Enrolment'** fields so that the **Yes** button becomes active for you to complete the Full Enrolment process.

Once the Full Enrolment request has been successfully submitted to NES the Enrolment information will be updated in the PMS along with the **Date Confirmed** and **Method of Enrolment** selected.

Sync button functionality

The Sync button will perform a retrieval of all current active enrolment information from NES and subsequently set the Funding details for the patient based on the retrieved enrolment details.

If the patient enrolment has been synchronised during the switchover process, the Sync button will not need to be used. The Sync button should only be used when either the enrolment or funding record appears incorrect, or the enrolment has not yet been synchronised as part of the switchover process.

The Sync button will become active when a patient has an enrolment status of **Confirmed Enrolment (C)** or **Newborn Preliminary Enrolment (B)**, and a **Method of Enrolment** and Date Confirmed has been entered.

Pressing the **Sync button** for a patient with an NHI entered in their patient record who has an enrolment status of **Confirmed Enrolment (C)** will result in one of the following occurring:

- An **Enrolment** from **NES**, resulting in the corresponding enrolment details being imported into the Patient Register followed by the patient's funding details being set/updated.
- A **Pre-Enrolment** from **NES**, resulting in the following message being presented but **No** change to the patient's **enrolment** or **funding details**.

The patient's Enrolment Status is showing as Pre-Enrolled on NES. Please review their enrolment and update accordingly.

- **No Enrolment** from **NES**, resulting in the following message being presented and **No** change to the patient's **enrolment** or **funding details**.

This patient has not been enrolled on NES

Pressing the **Sync button** for a patient with an NHI entered in their patient record who has an enrolment status of **Newborn Preliminary Enrolment (B)** will result in one of the following occurring:

- An **Enrolment** or **Pre-Enrolment** from **NES**, resulting in the corresponding enrolment details being imported into the Patient Register followed by the patient's funding details being set/updated.
- **No Enrolment** from **NES**, resulting in the following message being displayed and **No** change to the patient's **enrolment** or **funding details**.

This patient has not been enrolled on NES.

In the situation where the patient has not been enrolled on the NES (warning message will be presented) the practice must determine the required action to be taken after reviewing the enrolment.

Changes to the NES web portal enrolment functionality

New fields, **Date Confirmed** and **Enrolment Method**, have been added to the **Enrol Patient Screen** of the NES web portal. The **Date Confirmed** field is Mandatory in order to complete the Enrolment and will be pre-populated if available from the PMS. The Enrolment Method is a read-only field which is defaulted to **Form** as this is currently the only valid Enrolment Method.

The **'Update Active Enrolment'** button in the NES compare screen and the **'Update Enrolment'** button in the View Enrolment screen have been removed as these maintenance tasks will now be handled from the PMS.

Funding Enhancements

Changes to Funding Details section in Patient Register

Changes will be made to the Funding section of the Patient Register and related utilities to align with the Capitated Based Funding changes:

- The **'Funding From'** field name will be changed to **Funding Start Date**
- The **'Funding To'** field name will be changed to **Funding End Date**
- The **Reason for Rejection** field will be removed.
- All funding fields will be disabled and the **'Disable Patient Register Funding Dates'** option from the **Location Settings** screen will be removed.
- Prior to the CBF switchover being applied to a patient's record, their funding details will be displayed in a red font with a **warning message** displayed indicating that the switchover has not been processed and that the **Sync** button can be used to manually apply the CBF switchover for this patient.
- The **PHO Import utility** will be removed.
- The **PHO Export utility** will no longer make any changes to the **Funding Details Section** when run.
- Changes to related **Query Builder** funding queries will include:
 - New **Not Funded (N)** Funding Status value will be added as an option to the **Enrolment Funding Status Code** query

- The '**Enrolment Funding From Date**' query name will be changed to '**Enrolment Funding Start Date**'
- The '**Enrolment Funding To Date**' query name will be changed to '**Enrolment Funding End Date**'
- An **enrolled patient**, who is **not funded**, will now be charged at the **Funded** rate when being invoiced for a consultation, but you will still be able to claim for GMS ('**Cap**' will be **unticked from the new invoice window**) while the patient is in an Enrolled, Not Funded state.

How Funding will be set for the Patient

After the CBF Switchover, the funding will be derived from the patient's enrolment via the CBF switchover process or by synchronising any existing enrolment with NES using the **Sync** button from the enrolment details section of the **Patient Register**.

The enrolment with reference to the existing CBF details will be used to derive the funding details. Any further changes that may result from performing an enrolment, synchronise, re-enrolment, end enrolment or full enrolment will be used to recalculate and re-apply the funding details.

In the event an Invoice is back dated for an enrolled patient, the service fee will be calculated based off of the historical information entered with reference to the enrolment start date and Funding Start and End dates. The following are the possible back dating scenarios that may arise:

- **Back Dated before Enrolment Date:**
Service fee calculated as a **Casual/Registered** patient (depending on the patient's Registered Status) and the Cap (Capitated) checkbox will **not be ticked**;
- **Back Dated after Enrolment Date but patient is Not Funded:**
Service fee calculated as a **Funded** patient and the Cap (Capitated) checkbox will **not be ticked**;
- **Back Dated after Enrolment Date and patient is Funded:**
Service fee calculated as a **Funded** patient and the Cap (Capitated) checkbox **will be ticked**;

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