Medtech32 pre-release documentation Funding switchover to NES

Auto Synchronisation of Provider CPN (Common Person Number) and Facility Numbers

Summary of Change
A new feature added to ensure the auto-synchronisation of Enrolment Provider CPN and Facility Number information is completed so that the corresponding NES enrolment record is kept up to date if there are any changes to these values within Medtech32.

CPN & Facility No. Synchronisation Overview

To ensure future changes to the Provider CPN and Facility numbers associated with a patient's enrolment are synchronised with NES an automated process will run in the background at the time of making changes to a patient's record.

The following actions will result in this synchronisation operation being performed:

- The default provider for an enrolled patient has been changed in the Patient Register
- A service provider's location or CPN (HPI No) from the Staff Setup window has been changed
- When changing all patients who are associated with an Old Provider to a New Provider using the Bulk Provider Update Utility

Any change in a service provider's CPN (HPI No) or Location will, on pressing save, result in the following messages being presented:

Change in CPN (HPI No) number:

*A change to **<provider's name>**'s CPN number has been detected, if you proceed with this change all enrolments associated with this provider will be updated. Are you sure you want to continue?*

Change of Location:

*A change to **<provider's name>**'s Location has been detected, if you proceed with this change all the enrolments associated with this provider from NES will be updated. Are you sure you want to continue?*

Change in CPN (HPI No) number and Location:

*A change to **<provider's name>**'s CPN number and Location has been detected, if you proceed with this change all the enrolments associated with this provider from NES will be updated. Are you sure you want to continue?*

A change to a practice's HPI organisation or Facility number, on pressing save, result in the following messages being presented:

Change in HPI Organisation ID:

*A change to **<Location name>'s <Organisation ID>** has been detected, this change should be discussed with the Ministry of Health and your PHO prior to making this change as it will affect the enrolments associated with this location. Are you sure you want to continue?*

Change in HPI Facility Number:

*A change to **<Location name>'s <Facility Number>** has been detected, this change should be discussed with the Ministry of Health and your PHO prior to making this change as it will affect the enrolments associated with this location. Are you sure you want to continue?*

Change in HPI Organisation ID Facility Number:

> *A change to **<Location name>'s <Organisation ID> and <Facility Number>** has been detected, this change should be discussed with the Ministry of Health and your PHO prior to making this change as it will affect the enrolments associated with this location. Are you sure you want to continue?*

Bulk Provider Update Utility

A new **Bulk Provider Update Utility** will be introduced to change all patients associated with a given default provider to a new default provider.

In addition to the provider transfer, the utility will also synchronise the CPN and Facility number changes for patients that have an active enrolment. On executing the transfer, the following warning message will be presented:

> *A bulk change of **<Old provider's name>**'s associated enrolments to <**New provider's name**> will result in the enrolments being updated with <**New provider's name**>'s CPN and Facility number from NES. Are you sure you want to continue?*

Important Note: Patient Recalls and Appointments will not be transferred as part of the bulk provider update so if there is a need for these to be transferred you will need to contact Medtech support to assist with this task.

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 Medtech32 practices.

Practices should ensure that all relevant staff within the practice are aware of the changes made to the Medtech32 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