

PHO/Medical Centre Enrolment processes key changes – updates 2023-24

1. Newborn enrolments:

“Pēpi are eligible for enrolment if in the care of a guardian/whānau who is also eligible. A birth certificate is not required for enrolment. “

Ref: Health NZ Best Practice Pre-call and Recall for 6- week immunisations May 2024

[Best Practice: Pre-call Recall 6-Week Immunisation - May 2024 - Health Hawke's Bay \(healthhb.co.nz\)](http://healthhb.co.nz)

2. Proof of identity– Practices don't need to scan Proof of identify documents but they must be sighted and information documented within the PMS.

“Best practice is that photographic ID **must** be sighted to confirm identity i.e., drivers licence, passport. If none available, some other form of documentation to prove their identity. Practices should note on the enrolment form what documentation was presented to confirm identity. There is no need to keep copies of ID. “

Ref: Health NZ Eligibility & Entitlement for Enrolment & More – presentation 18.3.2024

Practices may chose to continue to store these documents but have to way this up with the requirements of the Privacy Act 2020.

[Microsoft PowerPoint - 230906 Eligibility and Entitlement HNZ \(healthhb.co.nz\)](http://healthhb.co.nz)

3. Re-enrolment prior to 3 year expiry - Auditable Contact

“There are three methods to re-enrol a person prior to enrolment expiry:

1. New enrolment form
2. A confirmation of enrolment form
3. Auditable Contact.

Obtaining a new enrolment form is always considered best practice but on occasion this may not be practicable. On those occasions Auditable Contact is available but does come with risk as it is quite easy to get it wrong. If you do get it wrong, it may invalidate the re- enrolment, which could potentially result in financial ramifications.

There are three things the practice must complete or have for a re-enrolment via Auditable Contact to be valid.

Firstly, the practice must hold an original valid signed enrolment form on file.

Secondly, the practice must contact the patient to confirm their wish to remain enrolled with the practice, and a note of the conversation must be recorded in the daily record.

Thirdly, and this is often where practices fail, the practice must have documented evidence that the patient's eligibility has been tested and that there is no reason for eligibility to have changed. It's only if these three conditions are met, that the re-enrolment date on the PMS can then be updated.

See attached a checklist, useful as a reminder of the necessary steps for Auditable Contact re-enrolment and if its fully completed and scanned into the inbox, there is unlikely to be any problems with regard to the re-enrolment and updating of the enrolment date. “

Ref: Health NZ Eligibility & Entitlement for Enrolment & More – presentation 18.3.2024

See word document on the Health Hawkes Bay website Auditable Re-enrolment checklist to adapt for your Practice.

4. NZ citizenship proof via NES

A very useful tool for checking if a person is an eligible New Zealand Citizen by birth is via the NHI function on the practice's PMS. Go to NES → Other Demographics → NZ Citizenship Status Proof and if it says "DIA data share" then this is confirmation enough that the person is a NZ Citizen by birth, and can be relied on by the practice as 100% evidence of the person's eligibility.

Ref: Health NZ Eligibility & Entitlement for Enrolment & More – Te Whatu Ora presentation 18.3.2024

5. Electronic signatures

"Electronic signatures on enrolment forms are perfectly acceptable, as long as they meet the standards set out in the Enrolment Requirements. There are now several companies offering a process for electronic enrolments.

However, we also agreed that a 'copied and pasted' signature on an electronic enrolment form requires no involvement from the enrolling person and in that sense is **not** the same as a manual entry (in digital or ink format) so would **NOT** be acceptable. Therefore it is important that whatever electronic enrolment service or electronic enrolment form the practice uses, that it does **not** allow a signature to be 'copied and pasted'.

We also discovered some practices, who had newly instigated a process of online re-enrolments, were accepting enrolment forms where the signature had been typed in Italics. This is also **NOT** acceptable as it also potentially requires no involvement from the enrolling person. The signature must be either hand-written or created using the mouse or a digital pen."

Ref: Health NZ Eligibility & Entitlement for Enrolment & More – Te Whatu Ora presentation 18.3.2024

6. NHI corrections and updates:

The Health NZ Enrolments and Eligibility Contact Centre have a revised process for verifying identity information such as name or gender changes, or where two individuals' identities may have accidentally been overlaid. The revised process allows the Contact Centre customerservice@health.govt.nz to send an email to the practice manager requesting the clarifying information.

The Health NZ Privacy Team have approved the following:

1. An email is allowed to be sent for the purpose of verifying identity information changes to a confirmed email address for the Practice.
2. Each request can only contain an NHI and only the identity information necessary for clarification (i.e. there is to be no clinical information).
3. There should only be one individual per email (i.e. multiple patient details cannot be in one email to the Practice except for investigating potential duplicate NHIs and matters of potential identity overlay).
4. In some challenging cases the Health NZ Enrolments and Eligibility Contact Centre may request your support to obtain and supply copies of official documents and/or signatures to help resolve identity and eligibility matters. Any such documents will be destroyed following the task completion.
5. Any email returned from Practices must be deleted from the mailbox following task completion.

Useful contacts and Info

Email:
eligibility@health.govt.nz
Phone: 0800 855 066

Enrolment Check List

- <https://www.health.govt.nz/new-zealand-health-system/eligibility-publicly-funded-health-services/resources-service-providers-check-eligibility/eligibility-enrol-primary-health-organisation>

Eligibility Direction

- <https://www.health.govt.nz/new-zealand-health-system/eligibility-publicly-funded-health-services/eligibility-direction>

Enrolment Requirements

- <https://www.tewhātuora.govt.nz/assets/For-the-health-sector/Primary-care/Referenced-documents/Enrolment-Requirements-for-Contracted-Providers-and-PHOs-Version-4.1.pdf>

Health Hawkes Bay PHO contacts:

Provider Network Team Health Hawkes Bay June 2024
info@healthhb.co.nz