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PMI and NHI User Guide NZ

Software Release V10

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1 Introduction

The Patient Master Index (PMI) is the core module of the suite of webPAS modules and is the central repository of personal details of all past, current and prospective patients.

All other webPAS modules draw essential information about patients from the PMI, for example, Name, Date of Birth, Allergies etc. For the purposes of completeness and clarity, the contents of this manual may extend into areas outside the PMI.

1.1 How This Guide is Organised

This guide describes how to use enter patient information into the PMI, and is intended for use by clerical and administrative staff.

The facilities of the PMI and associated modules are divided into the following main areas:

1.1.1 Searches / Enquiries

The PMI is equipped with useful facilities for making enquiries on patient data during day-to-day operations. It enables you to search for a patient according to selection criteria, and display details associated with a particular patient. Having selected a patient, you can perform various patient-specific tasks, such as viewing visits and admissions associated with a patient.

1.1.2 Registration

Registering the patient saves their details on the National Health Index (NHI), so that the information can be recalled on a subsequent visit or enquiry. Patients must be registered on the NHI.

1.1.3 Patient Alerts / Medical Warnings

Alerts are used to flag potential dangers to a patient, such as a food allergy. An Alert icon in the Patient Header indicates presence of one or more alerts.

1.2 Related Documentation

This user guide should be read in conjunction with the webPAS Standard Conventions User Guide.

The webPAS PMI and NHI Configuration Guide details the set-up required for system parameters and Categories and Codes.

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2 Searching for a Patient

Patient Searches can be done on the Local Hospital database and on the National Health Index (NHI).

The NHI Search has more rules around the information that needs to be entered, e.g. Surname, Given Name, Sex, Date of Birth or Age are all mandatory when completing a search.

A Local Hospital Search requires very little details, but the less that is entered the more records are returned. If too many records are returned it is advisable to refine the Seach criteria and perform the seach again.

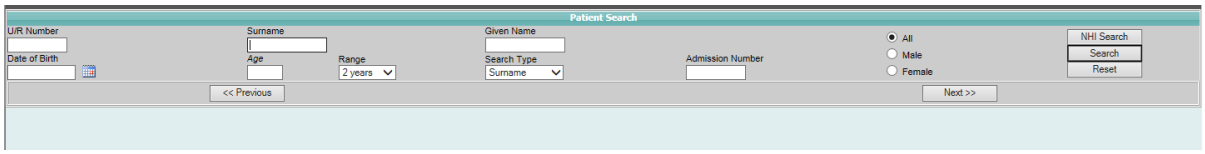
2.1 Patient Search on the Local Hospital Database

2.1.1 Surname Search

To perform a search of the local hospital database:

1. Select **Local Search** or **PMI Search** from the appropriate hospital level drop down menu.

The Patient Search screen will display.



2. Select a **Search Type**.

Available search types are described further in the section titled Other Search Types on page 9.

The Surname Search Type is used in this example, which searches for partial matches on the basis of surname.

3. Type four or five letters of the Surname.

4. Tab to the Given Name field.

5. Type the first letter of the given name (this will narrow the list of matching records, but is optional).

6. Click **Search**.

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Matching entries will display, in alphabetical order by Surname, then by Given Name and finally by second given name.

Only a limited number of entries are displayed at a time.

For further details about matching entries, refer to the section titled Patient Search Results on page 14.

7. Click **Next** to display the next screen of matching records (if there are more entries to view).

8. Click **Previous** to return to the previous screen of entries.

The End of Search text will display when there are no further entries.

- If the Surname is a common name, you may need to enter more letters into the Surname field.

- If the search is unsuccessful, check for variations on given names, for example, if searching for Tony check for Anthony, if searching for Bill check for William, and so on.

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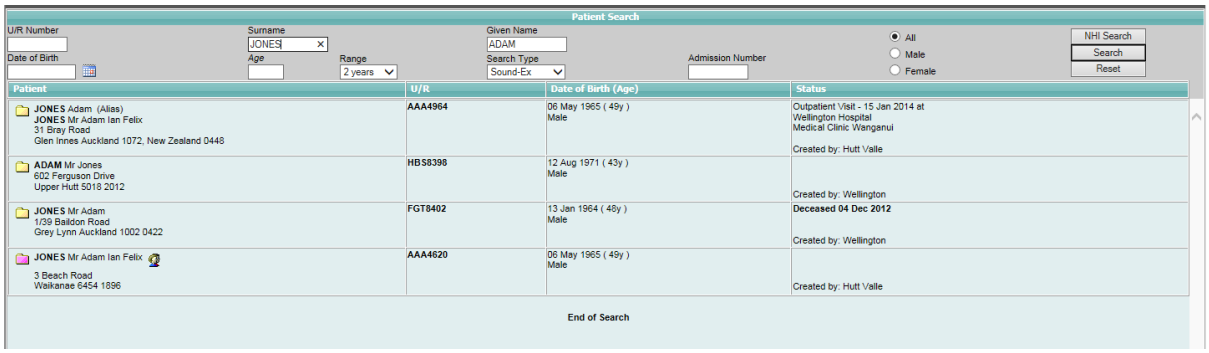
Note: The webPAS system can automatically swap Surname and Given Name in the search displaying matches as entered, and with the Surname and Given name reversed. This facility is enabled or disabled by modifying system parameters.



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2.2 Other Search Types

This section lists the other search types available within the PMI Search function.

2.2.1 Sound-Ex Search

The Sound-Ex search enables you to search for patients based on how a name sounds when spoken, rather than on how it is spelled. This is useful for names that can be spelled in a variety of ways.

Note: The Soundex Search is not 'sounds like' because the names must start with the same initial letter.

1. Type the full surname in the Surname field and the initial of the Given Name.
2. Select Sound-Ex in the Search Type drop down list.
3. Click Search.

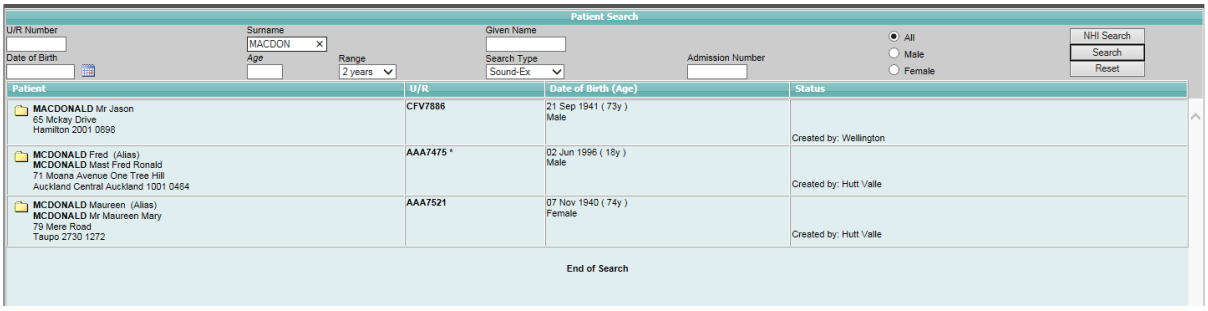
Matching entries will display.

Entries are listed in alphabetical order by Surname, then by Given Name and finally by second given name.

For further details about matching entries, refer to the section titled Patient Search Results on page 14.

Sound-Ex searches are especially useful for:

- Names with apostrophes (for example, O'Donnell)
- Names prefixed by Mc or Mac (for example, McDonald or MacDonald)



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2.2.2 U/R Number Search

1. Select U/R Number in the Search Type field.

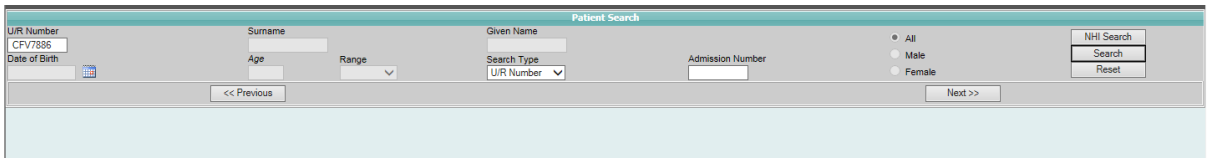
The U/R Number field is selected.

2. Enter the U/R number.

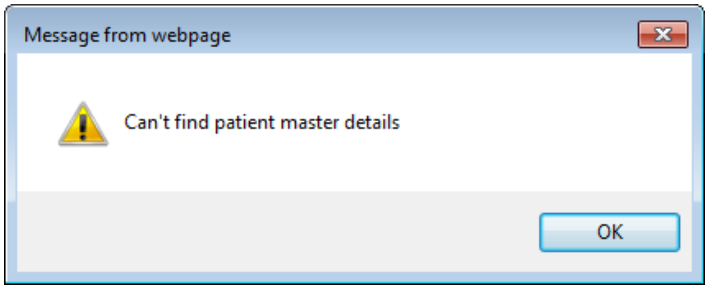
3. Click Search.

The patient will be automatically selected and the demographic details will display.

Note: When the U/R Number search type is selected the Surname, Given Name, Date of Birth, Age and Range fields are greyed out so they cannot be used.



If a U/R Number that does not exist in the Local Database is entered an Error message will display advising the PMI details cannot be located.



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2.2.3 Date of Birth Search

1. Select Date of Birth in the Search Type field.

The Date of Birth field is selected.

2. Enter the date of birth.

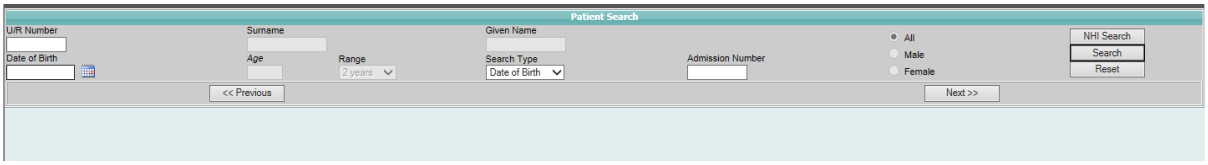
3. Click Search.

Matching entries will display.

Entries are listed in alphabetical order by Surname, then by Given Name and finally by second given name.

For further details about matching entries, refer to the section titled Patient Search Results on page 14.

Note: When the date of Birth search type is selected the Surname, Given Name, Age and Range fields are greyed out so they cannot be used.



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2.2.4 Admission Number Search

1. Select Admission Number in the Search Type field.

The Admission Number field is selected.

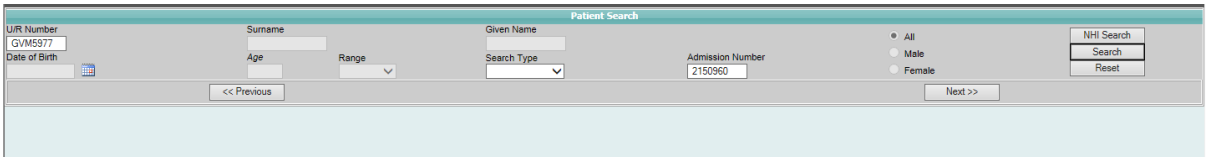
2. Enter the Admission Number.

3. Press Tab.

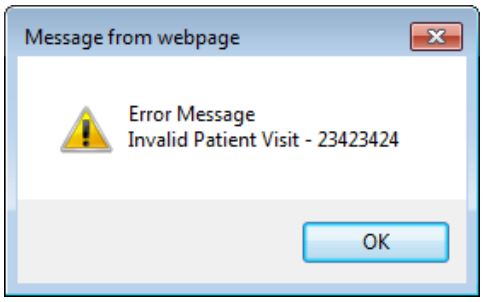
4. Click Search**.**

The patient's demographic details will display with the Admission Number in context.

Note: The system will automatically adjust the search method to search for a U/R Number if you specify an Admission Number.



If an Admission Number that does not exist in the Local Database is entered an Error message will display advising the Admission Number is Invalid.



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2.3 Patient Search Results on the Local Hospital Database

- For a **Surname** search, matching entries are displayed in order of Surname, then first given name and then age (oldest to youngest).
- Deceased status and date are displayed in the **Status** column.
- If an alias is associated with the name, the alias icon appears beside it; clicking this icon enables you to view the alias.
- Aliases that match your search criteria are displayed with the word **Alias** in brackets.
- Each matching entry has an associated Patient Folder. The colour of the icon indicates the patient's status. Icons and colours are determined site in configuration. Some example defaults are shown below.

Colour	Description
	Standard colour for a patient folder.
	Patient is an ACC patient.
	Patient is a Non-resident.

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2.3.1 Selecting a Patient

Once you have searched for a patient, matching records will display in the Patient Search screen.

1. Click the patient folder icon beside the required patient.

The Patient Demographics screen will display.

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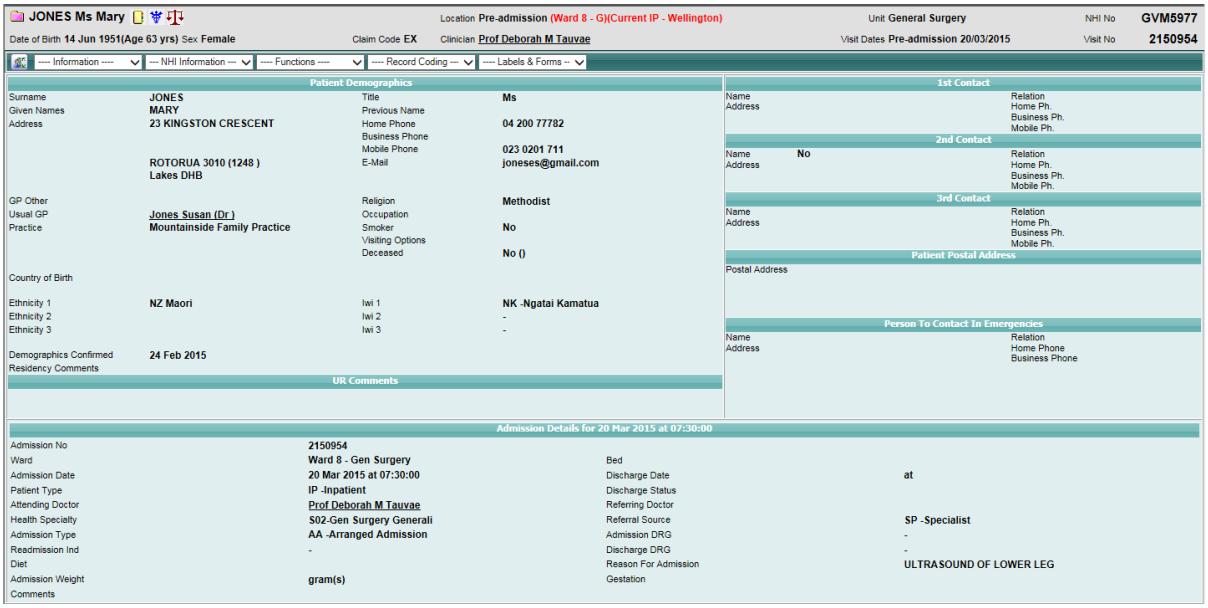
2.3.2 Patient Demographics Screen

The Patient Demographics screen displays patient information, including Name, Address, Home District Health Board, GP and Practice, Telephone numbers, Email address, Ethnicity and Iwi details (if applicable).

Contact details can also be viewed on this screen.



2.3.3 Search Limit

Currently, the webPAS search templates have a limit of 300 records. This means that for any search type selected, after 300 records have been checked, the server will output a message in red ‘Search Limit Reached Please Refine Search Criteria’.

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2.4 Patient Search on the NHI

2.4.1 Best Practice – NHI searching for Identity

The following comes from a document from the MOH explaining the best practice for performing searches on the NHI.

The following describes best practice for recording searching for individual identity on the NHI

The NHI has 2 different search methods – a simple wildcard search and the SSA-NAME3 search engine.

If you choose any search type (from your drop-down search type box) that is not Wildcard your search will be handled by the SSA-Name3 search engine

SSA-NAME3 is customised to take account of the variety of names in the NZ population. For example, Maori/English and Pacific Island/English equivalents have been added to its "population" reference file which also contains nicknames (Robert, Bob, Rob) and other name variations (Catherine, Katherine, Kathryn, Kathy).

SSA-NAME3 works by generating "match keys" from the name information you give it and multiple match keys are generated for every name. Part of this process involves "standardising" names (double consonants are removed, numeric values are assigned to all consonants and all vowels are treated as "a") and catering for name variations. When SSA-NAME3 was first installed, all the names in the NHI database were run through the engine and an index table was created of all the match keys generated. This index table is updated every time a name is added or deleted in the NHI. There are approximately 70 million match keys in the table.

When you search using SSA-NAME3 the match keys generated from your information are compared with the match keys in the NHI's index table and records matching those keys are extracted from the database. These records are then filtered by applying the date of birth (or age) and gender information also supplied in the search. The filtered records are then scored or ranked in comparison with the original search details, and the results are presented to the user with the highest scoring records at the top of the list. Only records which gain a score of 90 or more (in comparison to the original details) will be returned to the user.

If the results do not contain the record you are looking for at the top of the list, it is important to keep looking. Because of the way match keys are generated, unlikely looking matches which generate the same key values may be returned (you may also see this when using a Sound-Ex search in your local database)

SSA-NAME3 can also return many more results than required, and there is a current system limitation of 150 results returned per search. If you have a common name and a wide age range this may mean that the record you are looking for may miss the 150 record threshhold. Before attempting to register you should search again using more information (second or third given name, exact date of birth, specific gender).

If you don't give SSA-NAME3 a full name, or just a surname and first name initial, it may not be able to generate enough match keys to find the person, as NHI records are not normally created with partial names.

In addition, because consonants are primarily used to generate the match keys, if a name has been misspelled and a consonant left out or added erroneously, the match

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keys generated from the search name may not match the ones generated for the misspelled name and vice versa.

If you are unsure of the correct spelling of the name, or you have failed to find the person using a SSA-NAME3 search, then use the Wildcard option

You MUST select the wildcard option from your drop-down search type box before doing a wildcard search on the NHI.

The NHI requires a minimum of 2 characters of the surname and at least the first given name initial for a wildcard search.

A wildcard search will return the all names starting with the characters provided. There is no point supplying a complete surname in a wildcard search unless you think the name may be the first part of hyphenated name.

You can restrict the results returned by supplying more characters in the given name fields, but remember that you will only get back names beginning with exactly those characters.

Wildcard searches can also be used with a date of birth or an age range

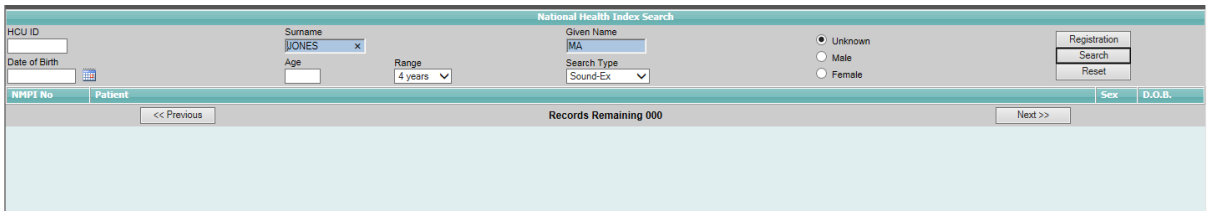
2.4.2 National Searches

If a patient cannot be found by performing a local search, the next step is to search the National database.

To perform a **National search**:

1. If a Search has already been performed on the Local Hospital Database and the patient not found, click the **NHI Search** button.

The details entered in the Local Hospital Search will default onto the NHI Search screen.



2. Alternatively, select **National Search** from the appropriate hospital level drop down menu.

3. Complete the remaining **Search criteria**.

Note: Surname, Given Name and Sex are all mandatory fields. Date of Birth or Age and Range are also required. See above for recommendations on performing NHI Searches.

4. Select a **Search Type**.

5. **Note:** A Search Type of Strict Surname will perform a NHI Wildcard Search. The remaining Search Types will perform a NHI SSA-NAME3 Search.

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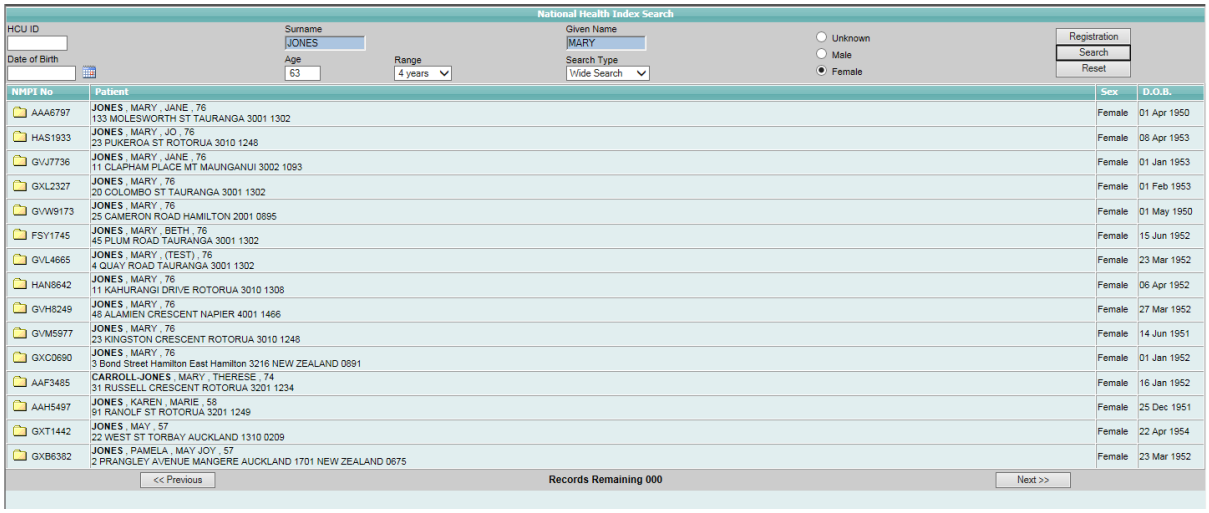
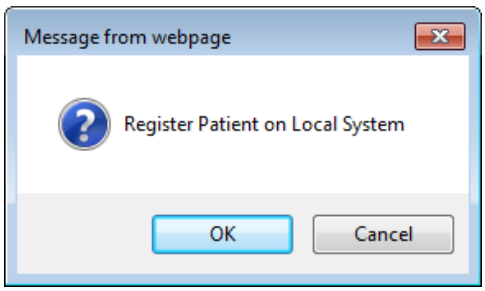
6. Click **Search**.

The matching entries are displayed.



7. **Select** the patient required to Register them on the Local Hospital Database. Once the patient is selected the following message will display.



8. If the patient is not found on the NHI **Register** the patient on the NHI.

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3 Registration

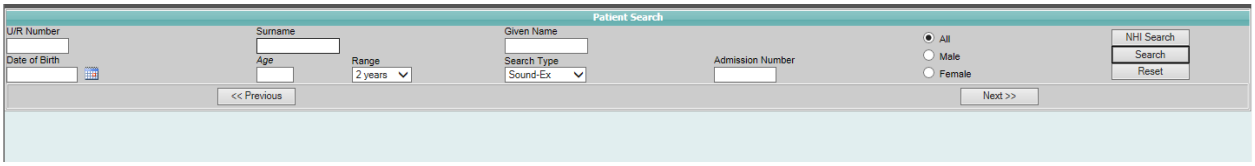
Registration involves identifying a patient by their unique National Health Index (NHI) number.

Registration also involves allocating a new NHI number if this is the patient's first visit to any Hospital in New Zealand. The NHI number links the patient's current and future visits together, enabling staff to view the patient's medical history over a series of events.

3.1 Existing Patients

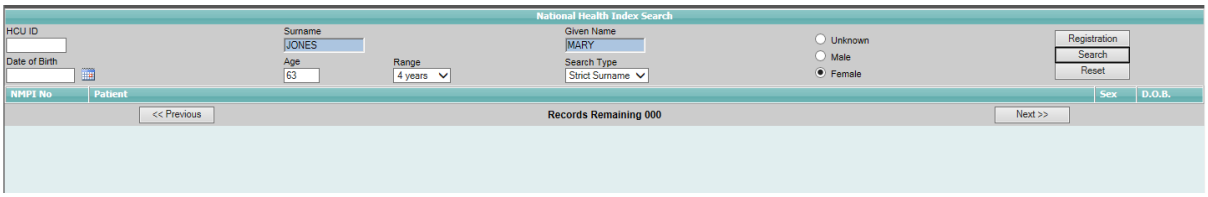
1. Select **Patient Search** from the appropriate hospital level drop down menu.

2. Enter the search criteria.



3. Click **Search** or press Enter.

4. If the patient does not appear on the Local Hospital Database perform a **National Search**.



Refer to Searching for a Patient if required.

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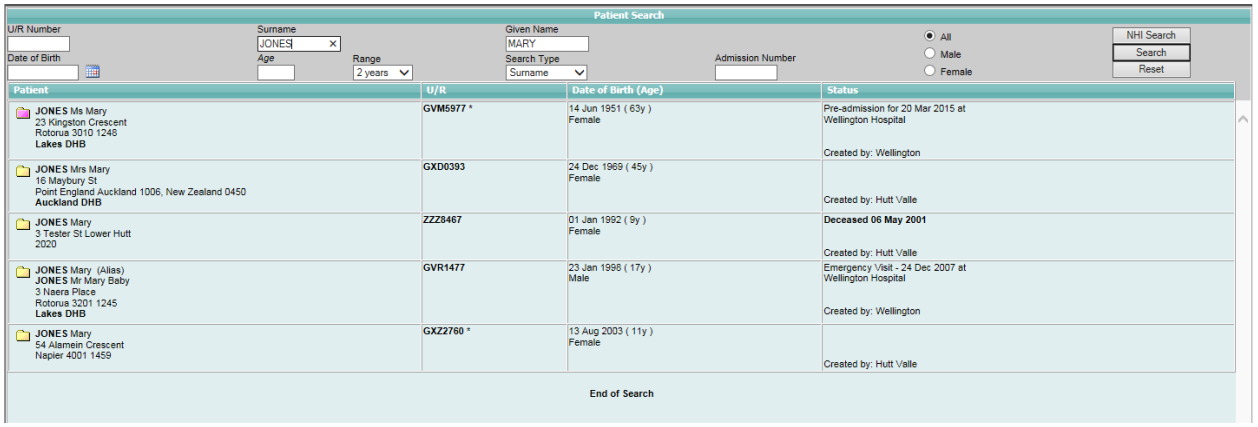
If a patient record (with an NHI number) is returned that matches the search criteria, then the patient does not need to be registered.



Note: It is advisable to confirm the registration details with the patient.

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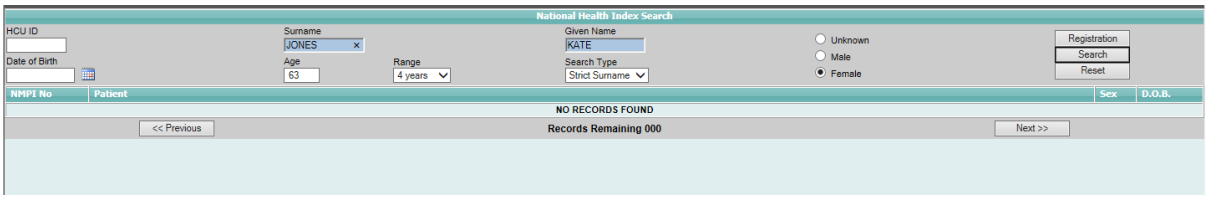
3.2 New Patients

3.2.1 Registering a new NHI Number

If the **National Search** does not return a match based on the search criteria entered, a new NHI number will need to be allocated.

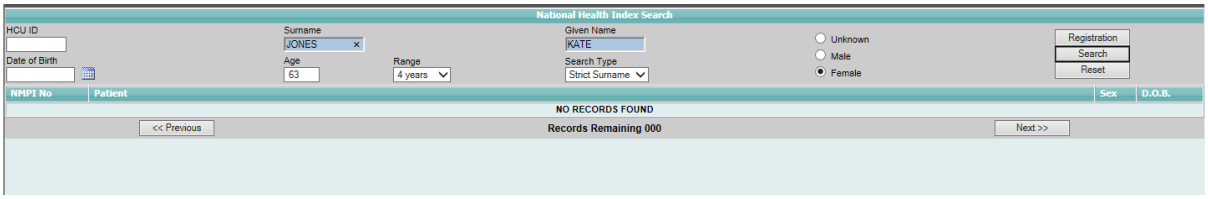
1. Navigate to the **National Search** screen.



2. Enter the search criteria

3. Click **Search** or press Enter.

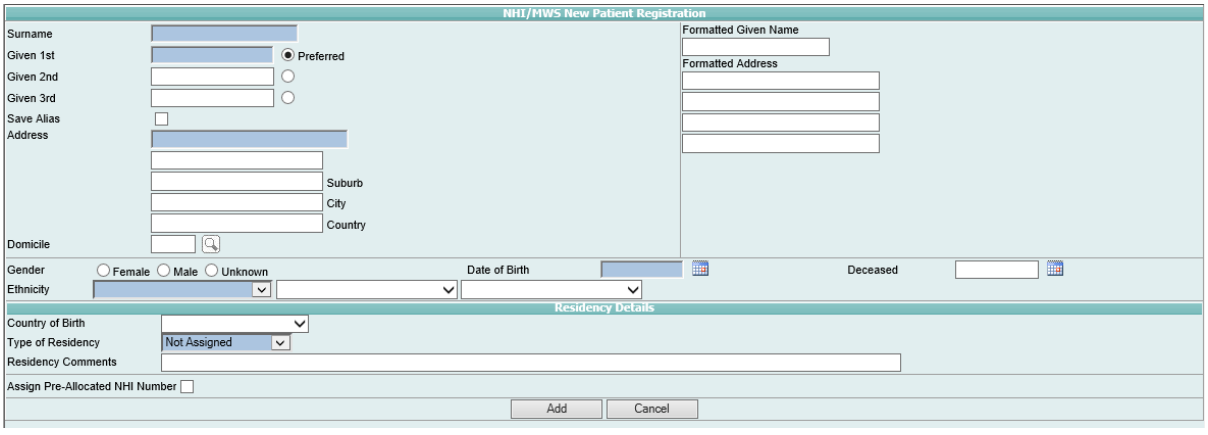
The NHI Search screen will display with the patients returned from the NHI.



4. If the patient is not found, click **Registration**.

The NHI/MWS New Patient Registration template will display.

The Surname and Given Name entered in the Patient Search screen will auto-populate the corresponding fields on the New Patient Registration template.



5. Complete the fields.

Note: Blue fields are mandatory and this information must be recorded.

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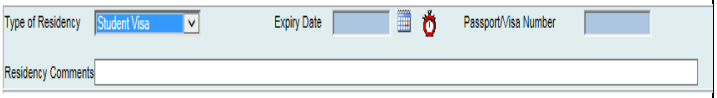
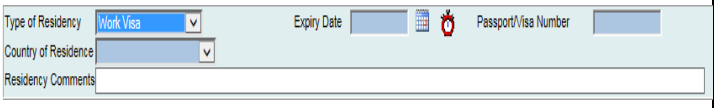
Field	Description and Use
Surname	Enter the patients Surname
Given 1st	Enter the patients 1st Given Name
Given 2nd	Enter the patients 2nd Given Name
Given 3rd	Enter the patients 3rd Given Name
Preferred	Select the Preferred Given Name
Save Alias	Tick this field to save the patient name as an Alias
Address	Enter the patient address using the 5 lines provided. Suburb should be entered in line 3, City in line 4 and Country in line 5. A Post Code will automatically be allocated to the patient address.
Domicile	A Domicile Code will be allocated to the address by the NHI.
Gender	Select the patient Gender.
Date of Birth	Enter the patient Date of Birth
Ethnicity	Enter up to 3 Ethnicity codes for the patient. Select the codes from the drop down list.
Type of Residency	Enter the patient Resident Status. Select a code from the drop down list. If a Resident of NZ code is selected no more details are required. If a Non-resident code is selected the webPAS system can be configured to require Country of Residence to be captured. If a Non-resident code is selected where the patient is in NZ on a Visa the webPAS system can be configured to require the Expiry Date and Visa Number to be captured.  Alternatively, if a Non-resident code is selected where the patient is in NZ on a Visa the webPAS system can be configured to require the Expiry Date, Visa Number and Country of Residence to be captured. 
Residency Comments	Enter any free text comments relevant to the patients Residency Status.

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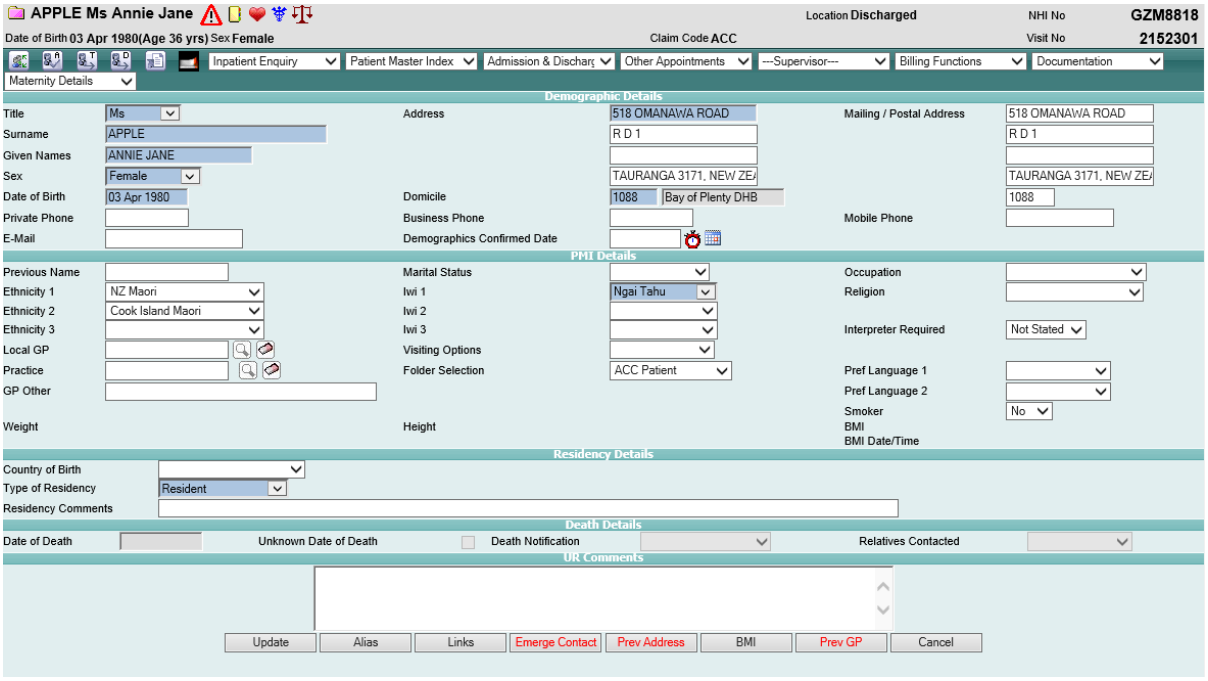
6. Click **Add**.

Details are saved on the NHI and the Patient Demographic Details template will display.



Note: The Patient Header will now display, including the NHI Number, as the patient has been registered.

7. Complete the remaining demographic information such as Email, Phone Numbers, GP and Practice.

8. Once the demographic information is confirmed enter the Demographics Confirmed Date.

9. Click **Update**.

The Patient Demographics template will display in a read-only format.

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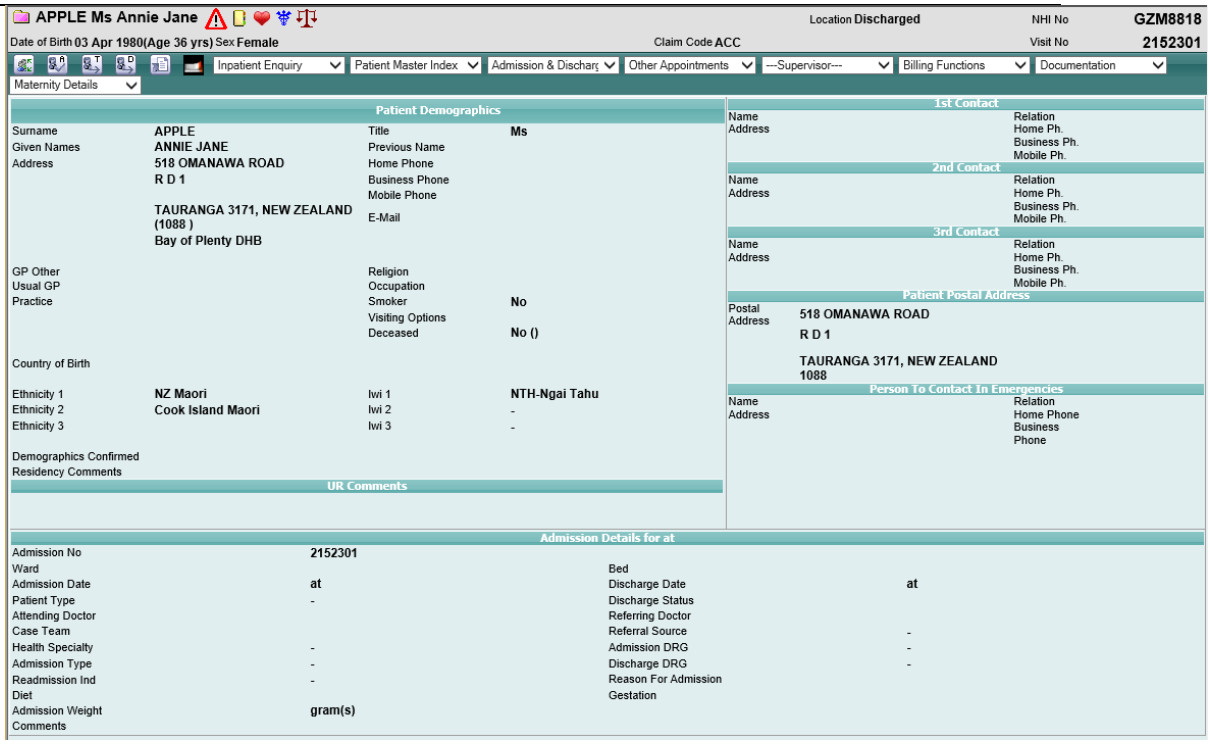
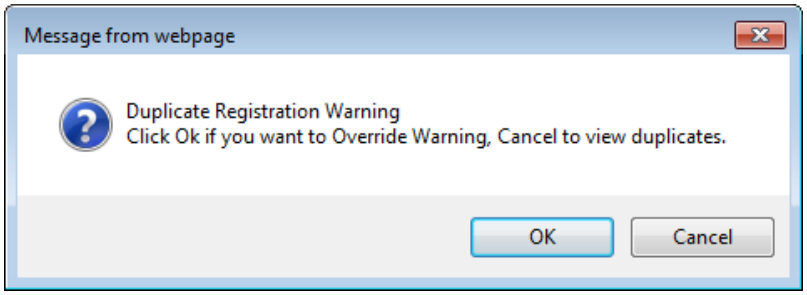


3.2.2 Duplicate NHI Number warning on Registration

During the NHI Registration process if the patient being registered is similar in details to an existing patient on the NHI a warning is displayed.



1. Click **OK** to override the warning and continue with the Registration.

2. Click **Cancel** to cancel the Registration and return to do a NHI Search.

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3.3 Additional Registration Information

Apart from NHI and basic patient information, users can enter extra registration information, including

- Patient Aliases
- Emergency Contacts
- Extra Contacts
- Patient Photograph
- BMI Details

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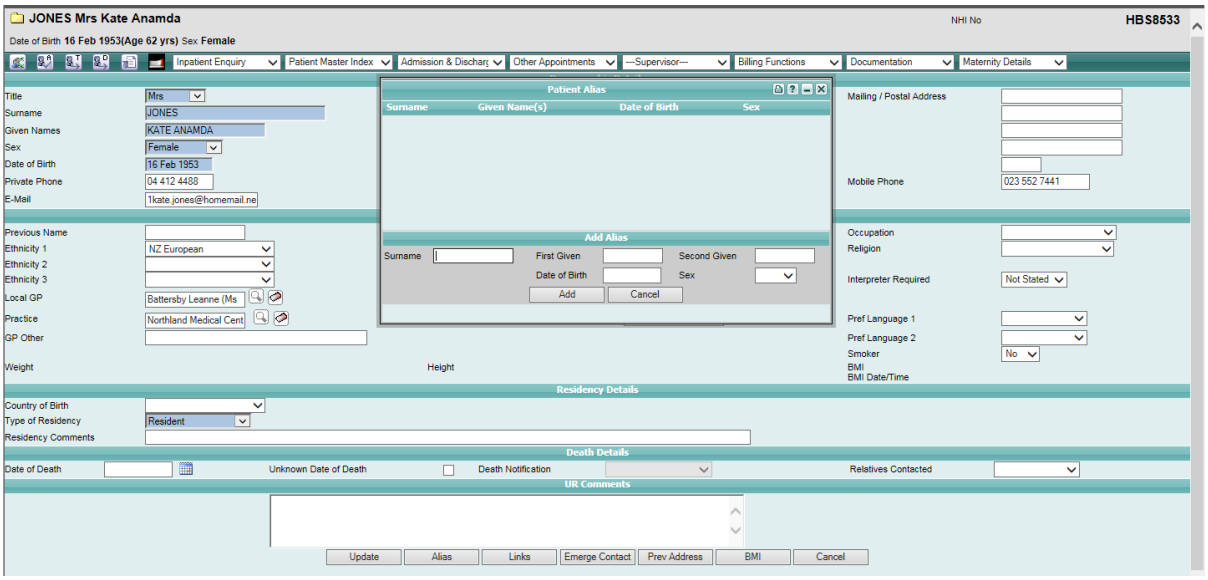
3.3.1 Patient Aliases

If a patient has one or more aliases recorded, the Alias icon will display in the Patient Demographics template.

3.3.1.1 Adding an Alias on the Local Hospital database

1. Locate the required patient.
2. Select **Update Patient Details** from the appropriate patient level drop down menu.
3. Click **Alias**.

The Patient Alias template will display.



4. Complete the fields.

Note: Entering another **Surname**, **Given** name, **Date of Birth** or **Sex** on this screen, creates an alias, but does not replace the patient's registration details. As these details merely relate to an alias, these do not need to be verified by official documents, and even the **Sex** can be different to the actual sex of the patient.

5. Click **Add**.

The new alias record will display in the Patient Alias list.

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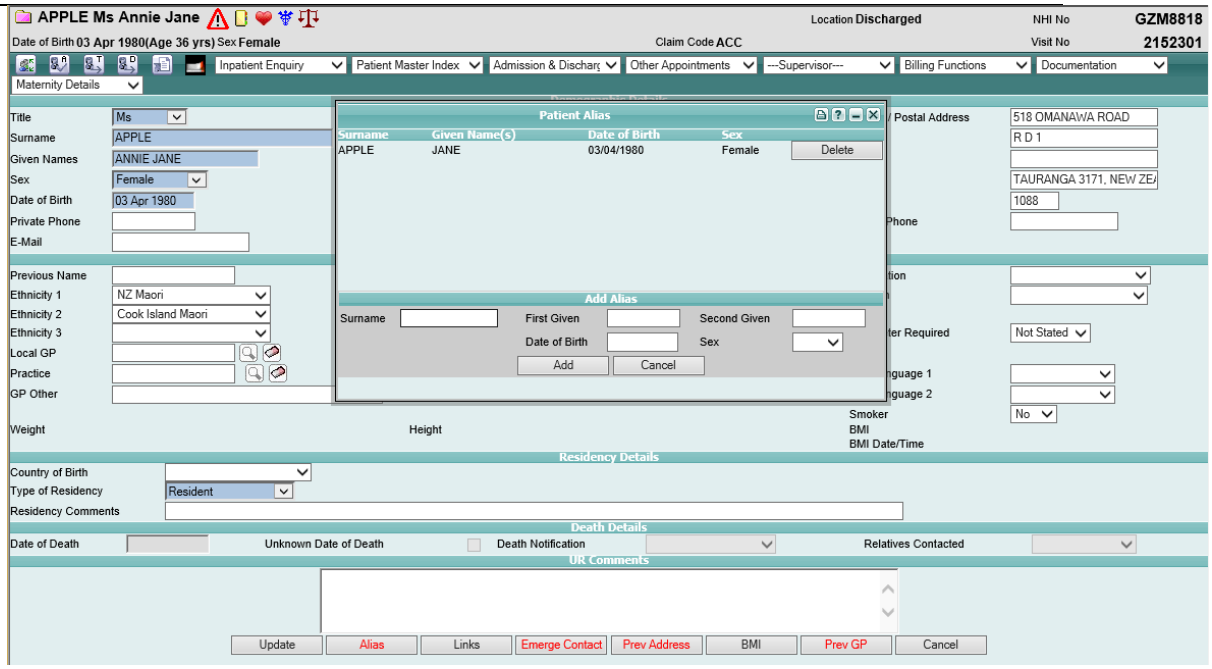
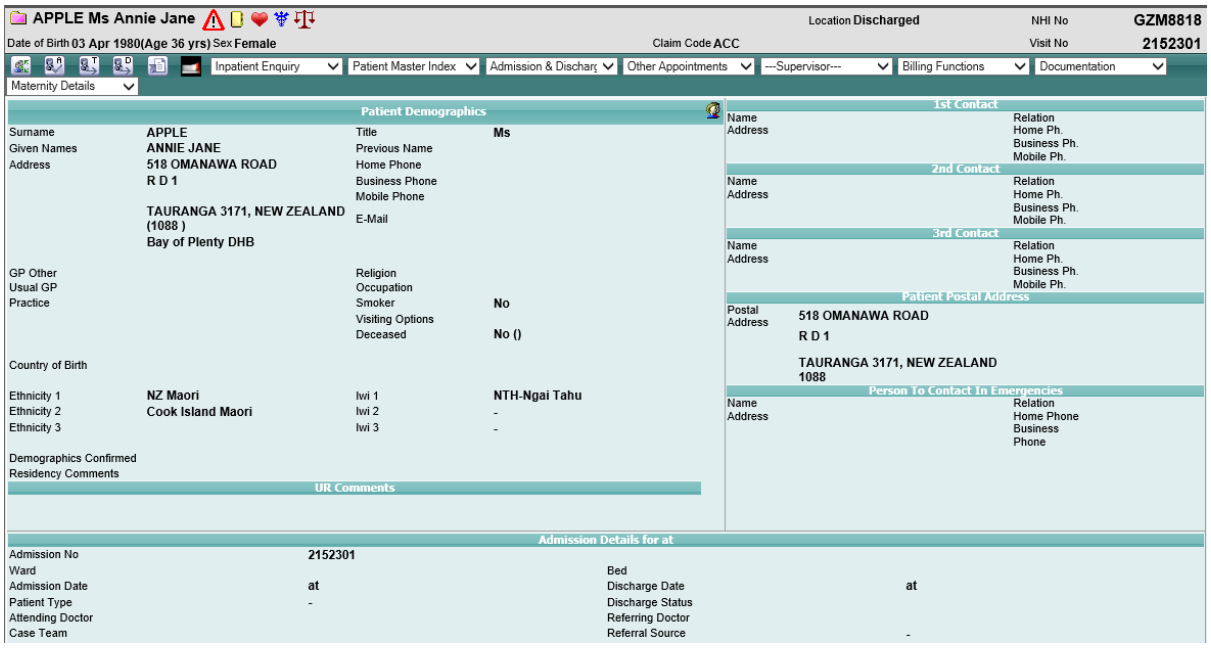


Additional aliases can be recorded as required.

The Patient Demographic template will display the Alias icon.



The Patient Search template will also display the Alias icon.

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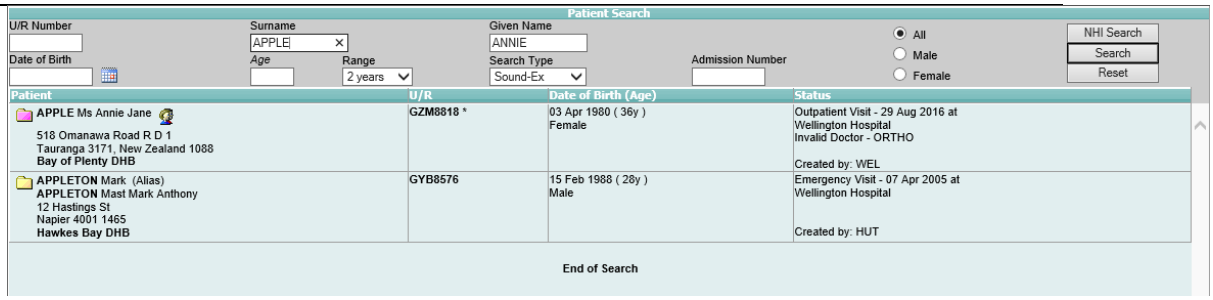
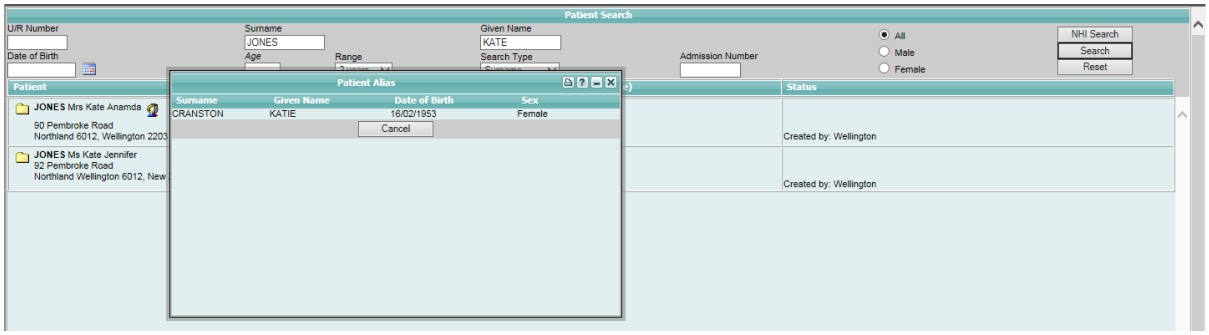


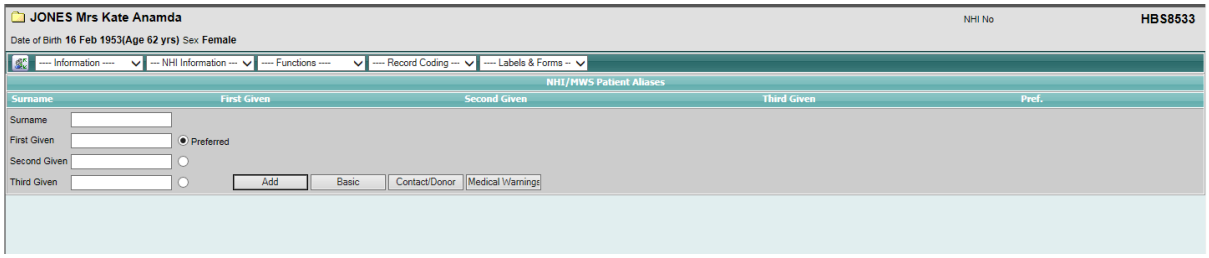
6. Click the Alias icon to display the read-only Patient Alias list.



3.3.1.2 Adding an Alias on the NHI

1. Locate the required patient.
2. Select **Update NHI Aliases** from the appropriate patient level drop down menu.

The Patient Alias template will display.



3. Complete the fields.
4. Click **Add**.

The new alias record will display in the NHI Alias list.

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Note: Entering an Alias on the NHI will also write the Alias to the Local Hospital database.

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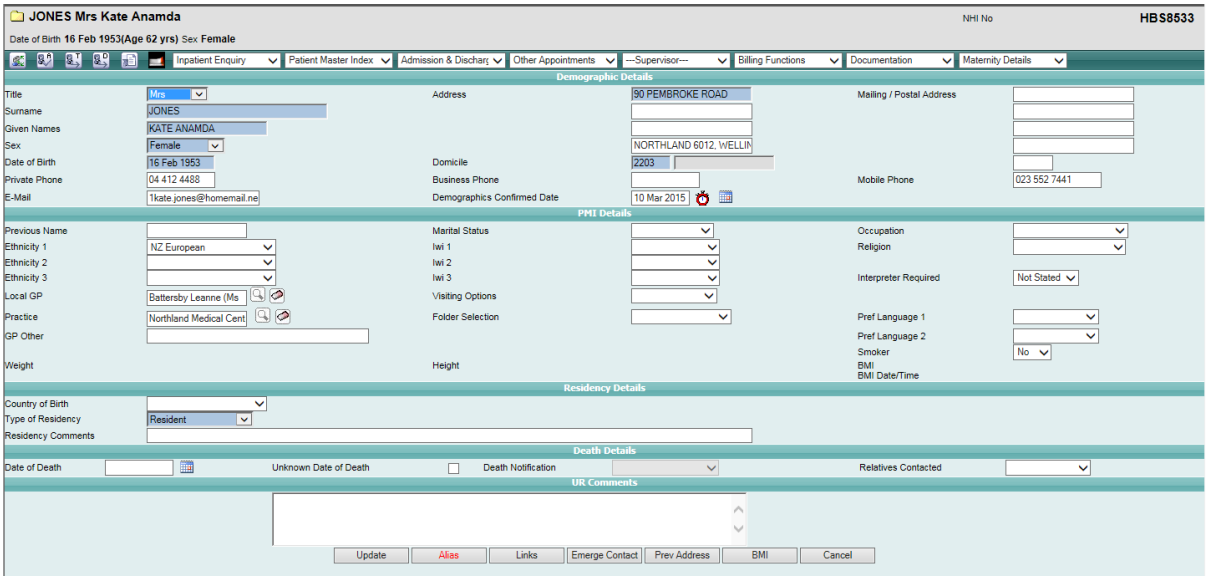
3.3.1.3 Deleting an Alias on the Local Hospital database

1. Locate the required patient.

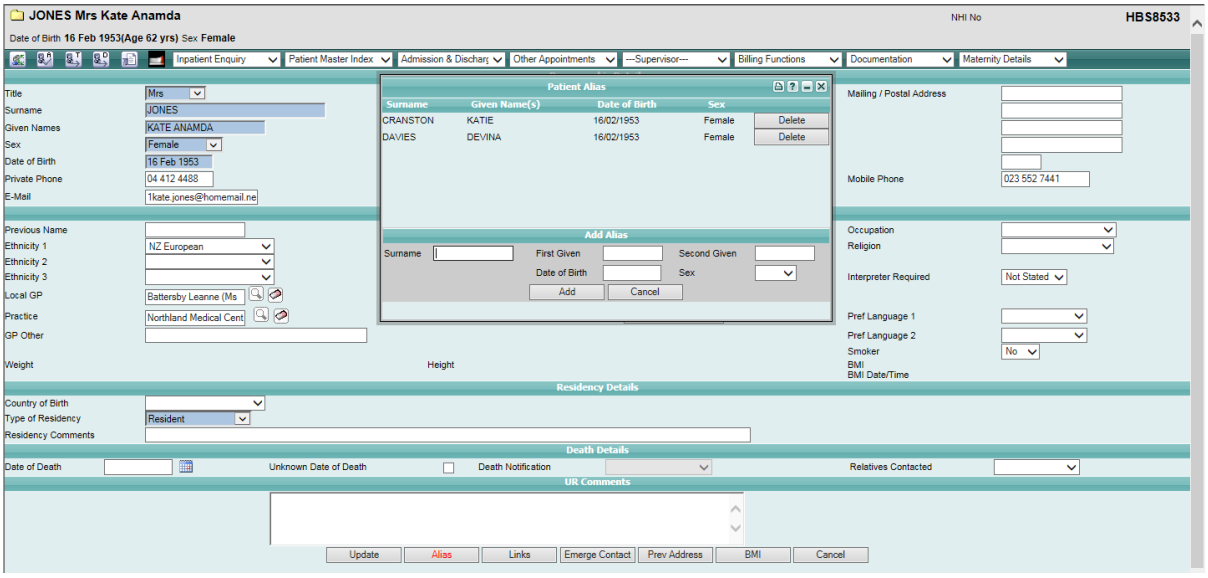
2. Select **Update Patient Details** from the appropriate patient level drop down menu.

Note: The Alias button text displays in red, indicating that an Alias record exists.



3. Click **Alias**.

The Patient Alias template will display.



4. Click **Delete** to remove the required record.

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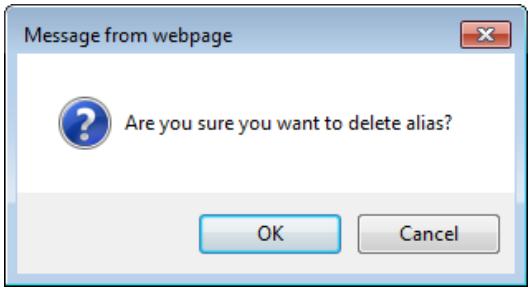
The following confirmation message will display.



5. Click **OK**.

The Alias record will be permanently deleted.

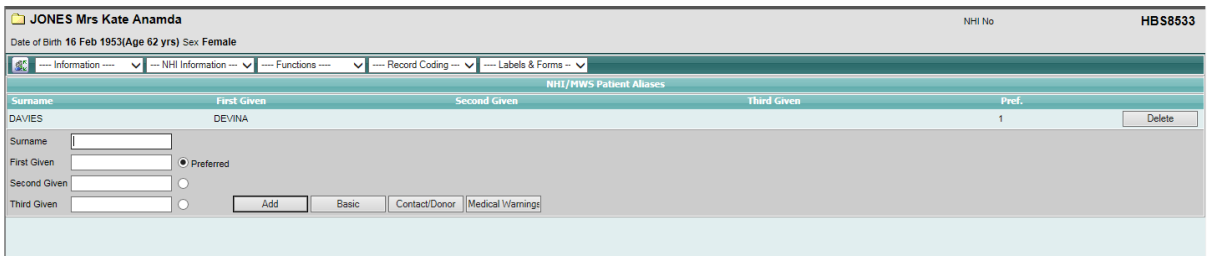
Note: If all Alias records are deleted, the Alias icon will cease to display on the Patient Demographic template.

3.3.1.4 Deleting an Alias on the NHI

1. Locate the required patient.

2. Select **Update NHI Aliases** from the appropriate patient level drop down menu.

The Patient Alias template will display.



3. Click **Delete** to remove the required record.

The Alias record will be permanently deleted.

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3.3.2 Emergency Contacts

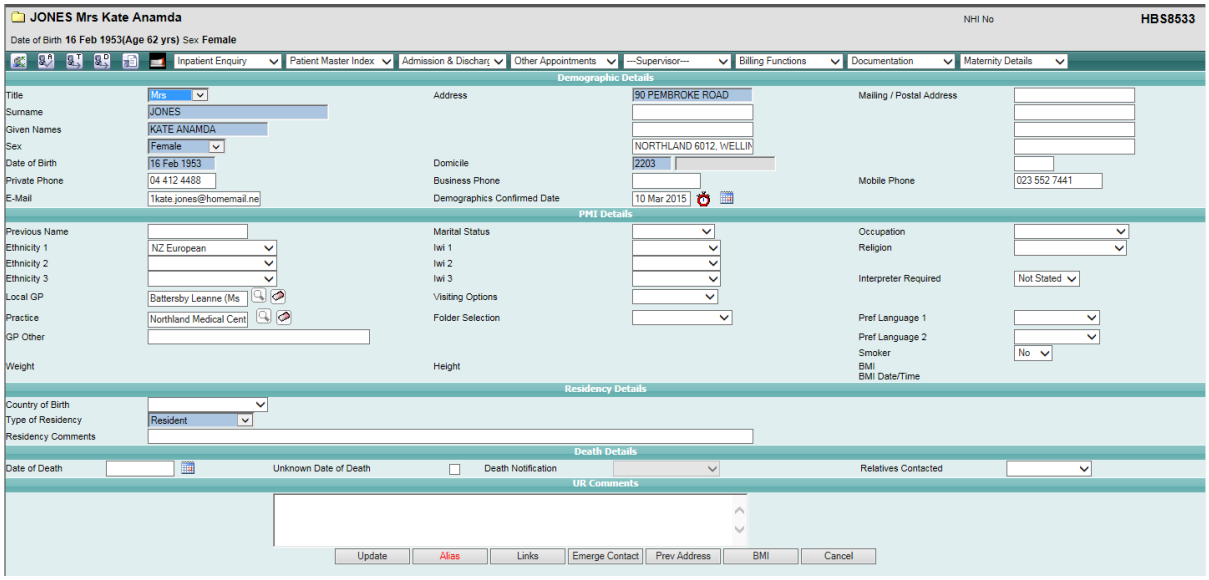
It is important to enter emergency contact details for a patient and to ensure that these details are up to date at each visit.

When a patient is registered, the Emergency Contact template will display after the Patient Details template has been completed.

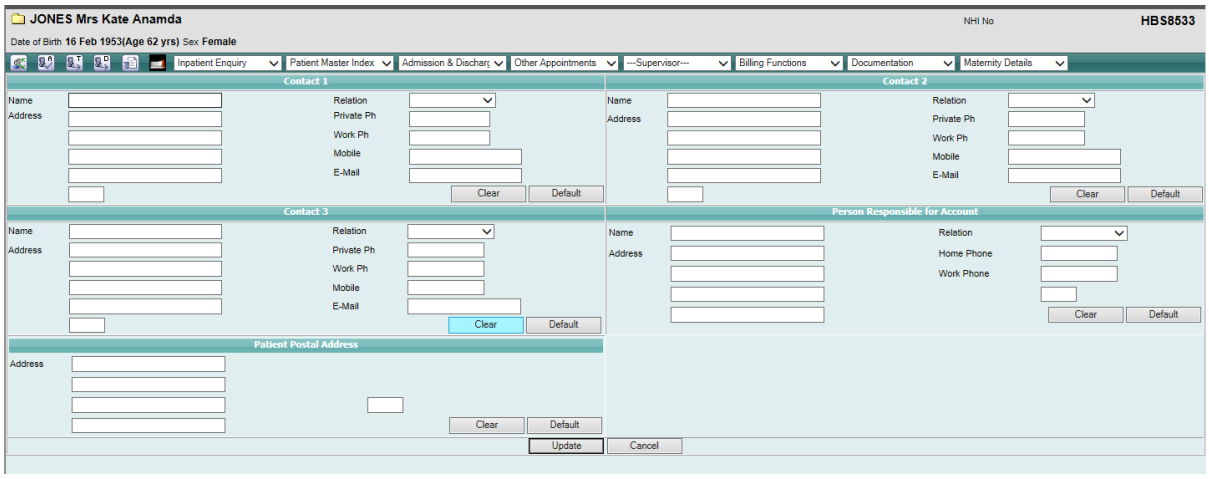
It is important to ensure that these details are correct at each patient visit.

1. Locate the required patient.

2. Select **Update Patient Details** from the appropriate patient level drop down menu.



3. Click **Emerge Contacts** or select from the appropriate patient level drop down menu.



Enter Contacts 1, 2 and 3, Person Responsible for Account and Patient Postal Address details.

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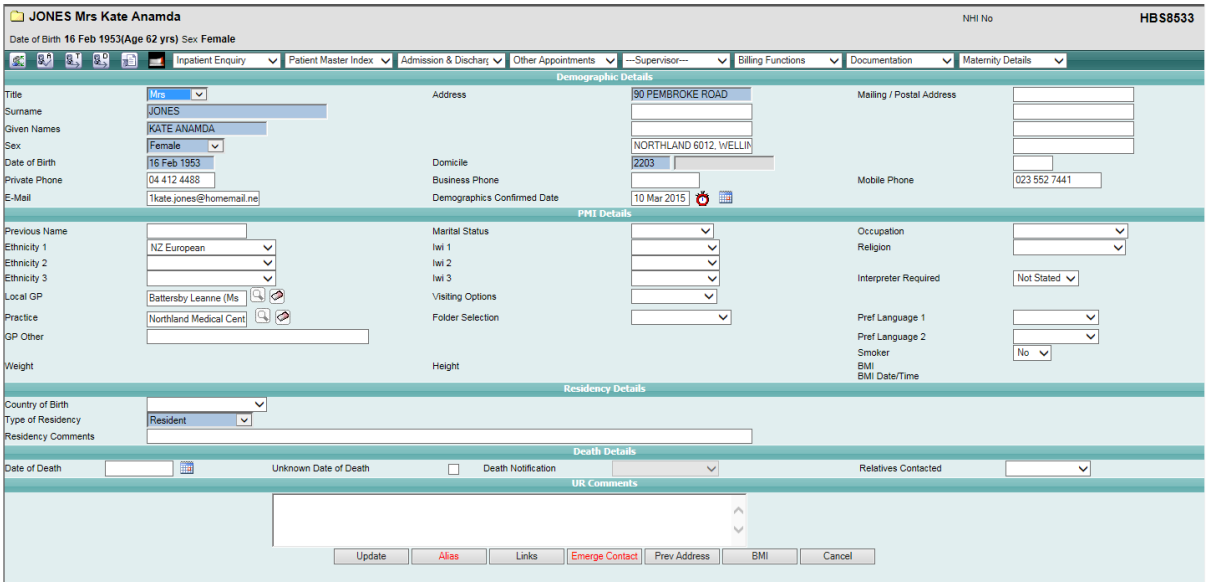
4. Click **Default** if you want a particular Contact to display the same Address and Private Phone as the patient.

5. Click **Clear** to remove the details for a particular Contact.

6. Click **Update**.

The details are saved and the Update Registration Details screen is displayed.



Note: The **Emerge Contact** button text displays in red, indicating that an Emergency Contact records exists.

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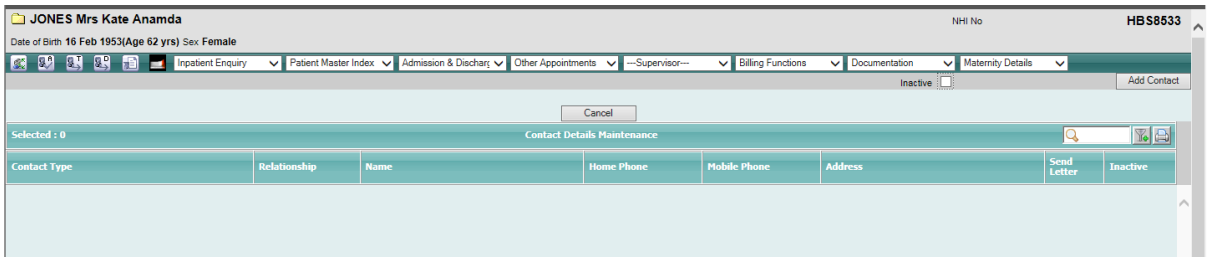
3.3.3 Extra Contacts

In addition to the Emergency Contacts, Extra Contacts can be recorded against a patient. For example, to record Power or Attorney, Guardian etc.

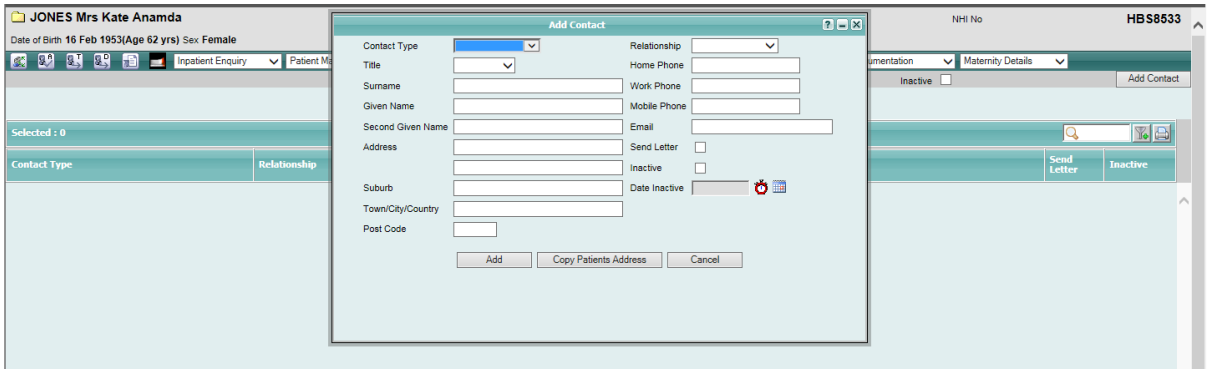
3.3.3.1 Add an Extra Contact

1. Locate the required patient.

2. Select **Extra Contacts** from the appropriate patient level drop down menu.



3. Click **Add Contact**.



The Add Contact screen will display.

4. Enter the **Contact Type** from the drop down list.

5. Complete the details required.

6. Click **Copy Patients Address** if you want to display the same Address and Home Phone as the patient.

7. Click **Add**.

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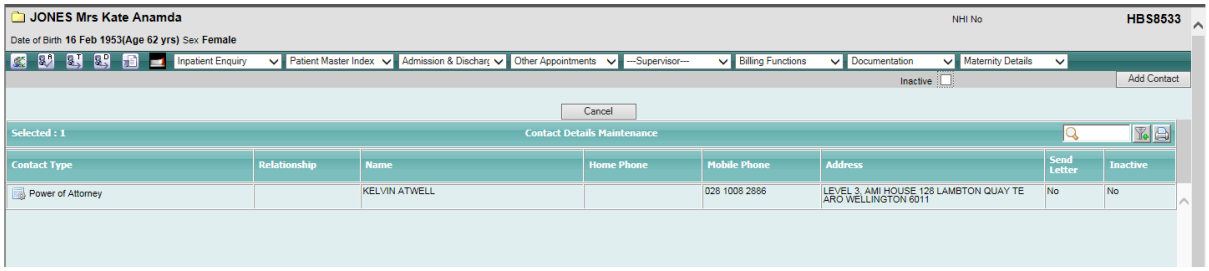
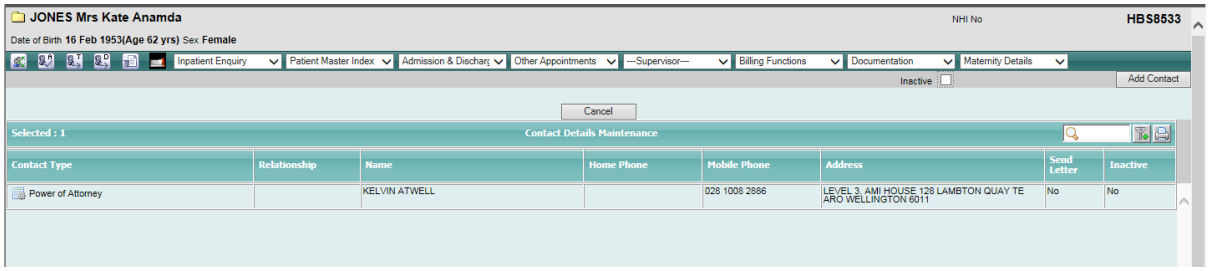
The **Extra Contact** details are saved.



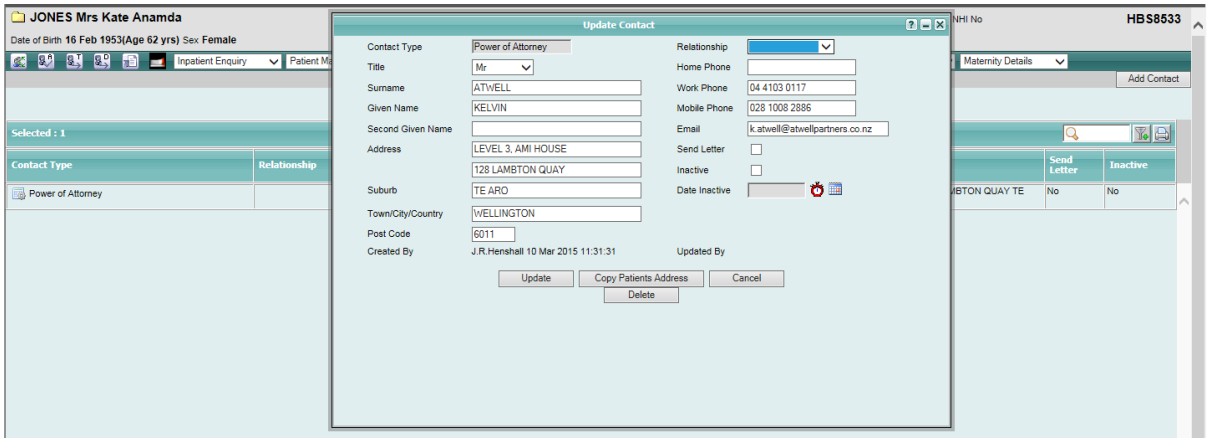
3.3.3.2 Update an Extra Contact

1. Locate the required patient.
2. Select **Extra Contacts** from the appropriate patient level drop down menu.



3. Select the Extra Contact to Update.

The Update Contact screen will display.



4. Make the required changes, including the ability to make the Contact Inactive.
5. Click **Update**.

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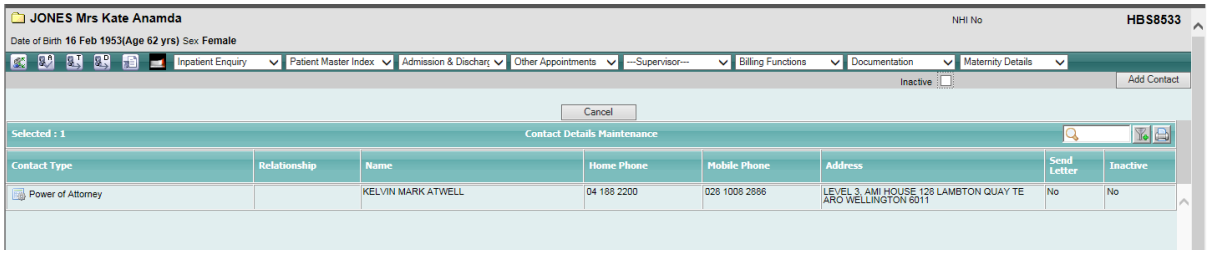
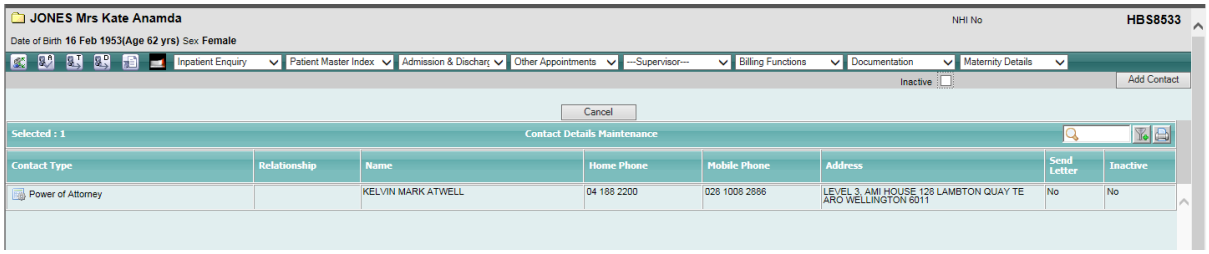
The **Extra Contact** details are saved.



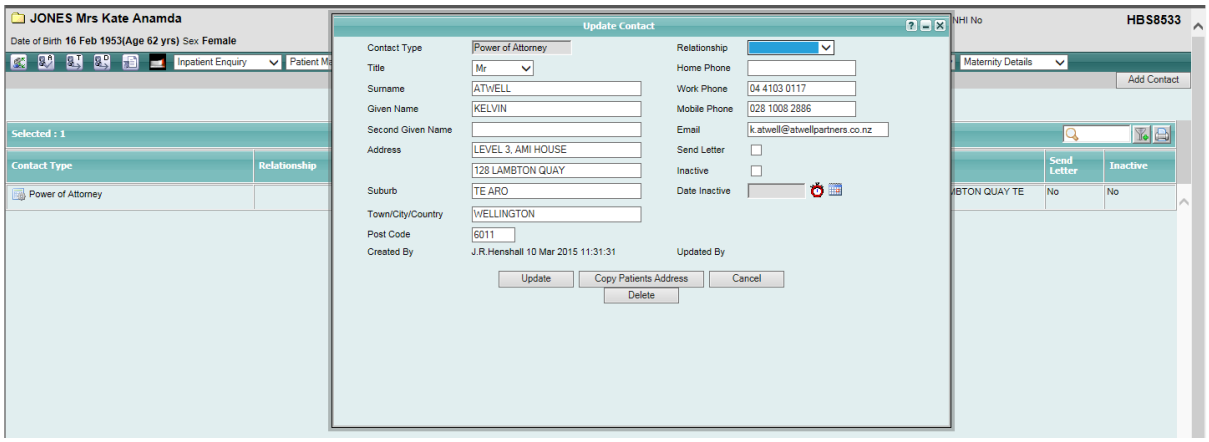
3.3.3.3 Inactivate an Extra Contact

1. Locate the required patient.
2. Select **Extra Contacts** from the appropriate patient level drop down menu.



3. Select the Extra Contact to Inactivate.

The Update Contact screen will display.



4. Click **Inactive**.
5. Enter the **Date Inactive** field.
6. Click **Update.**

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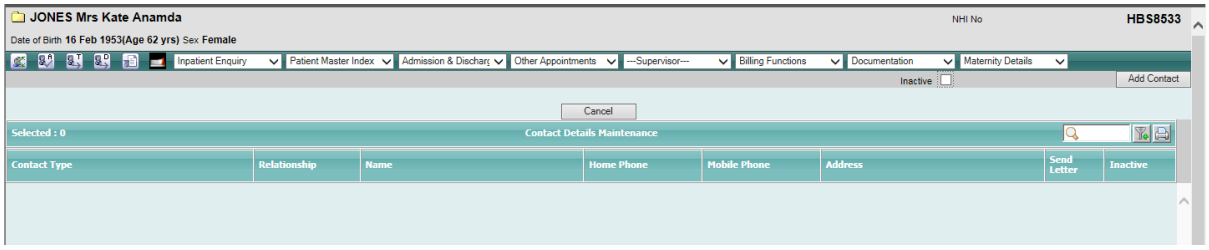
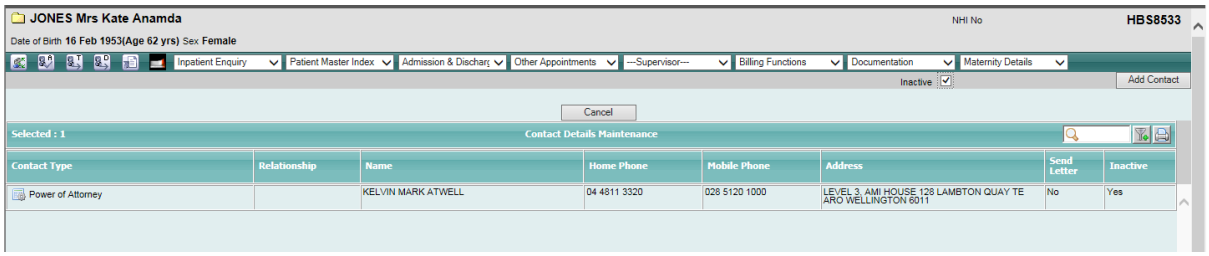
The **Extra Contact** details by default will not display the Inactive records.

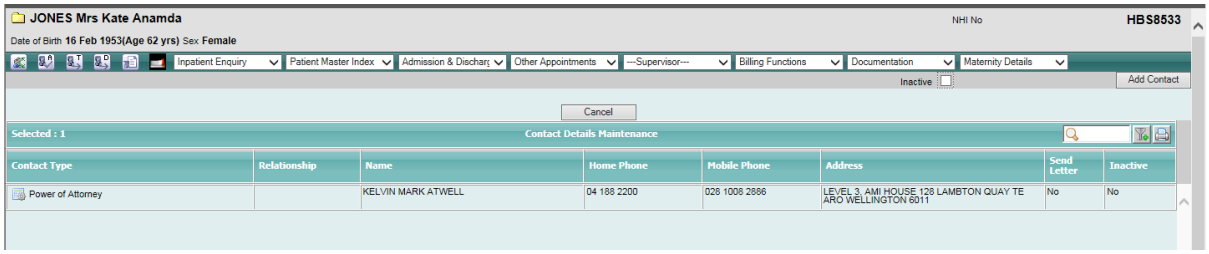


7. Click the **Inactive** tick box to display Inactive Contacts**.**



3.3.3.4 Delete an Extra Contact

1. Locate the required patient.
2. Select **Extra Contacts** from the appropriate patient level drop down menu.



3. Select the Extra Contact to Delete.

The Update Contact screen will display.

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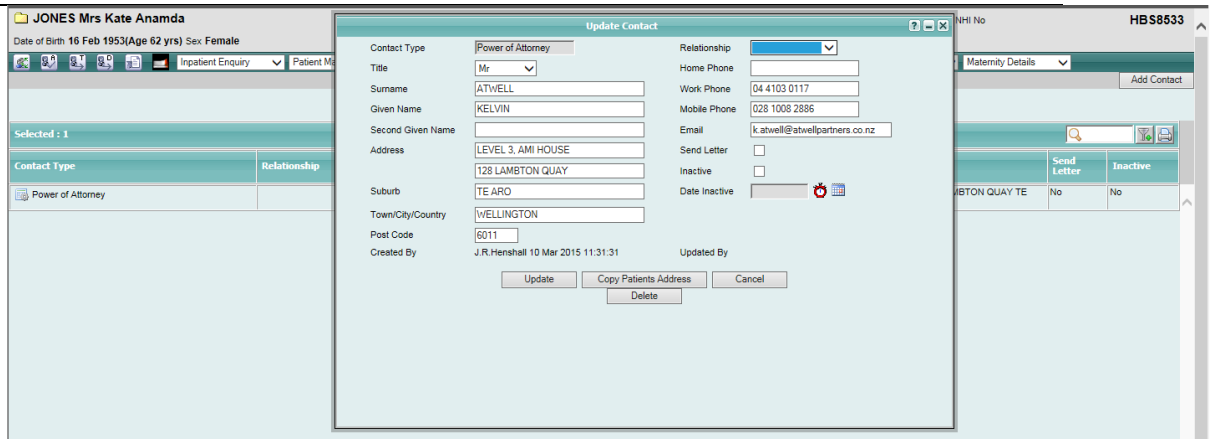
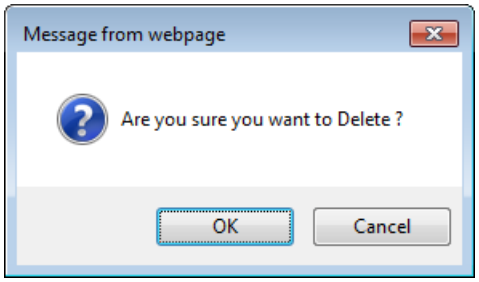


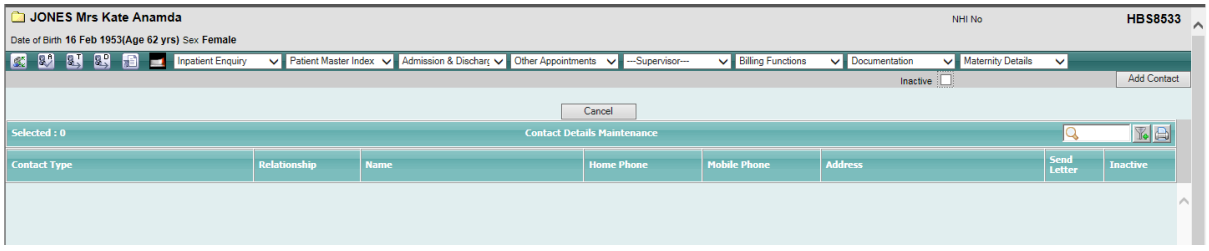
4. Click **Delete**.

A warning message appears confirming that the Contact is to be deleted.



5. Click **Ok.**

The **Extra Contact** details are removed.



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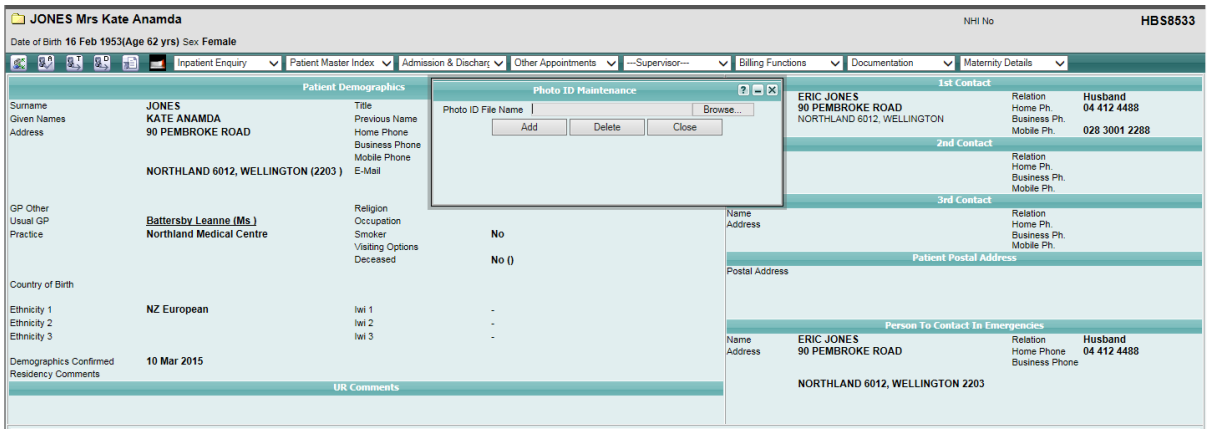
3.3.4 Patient Photograph

A photograph of a patient can be added to the system, which then displays in the patient header.

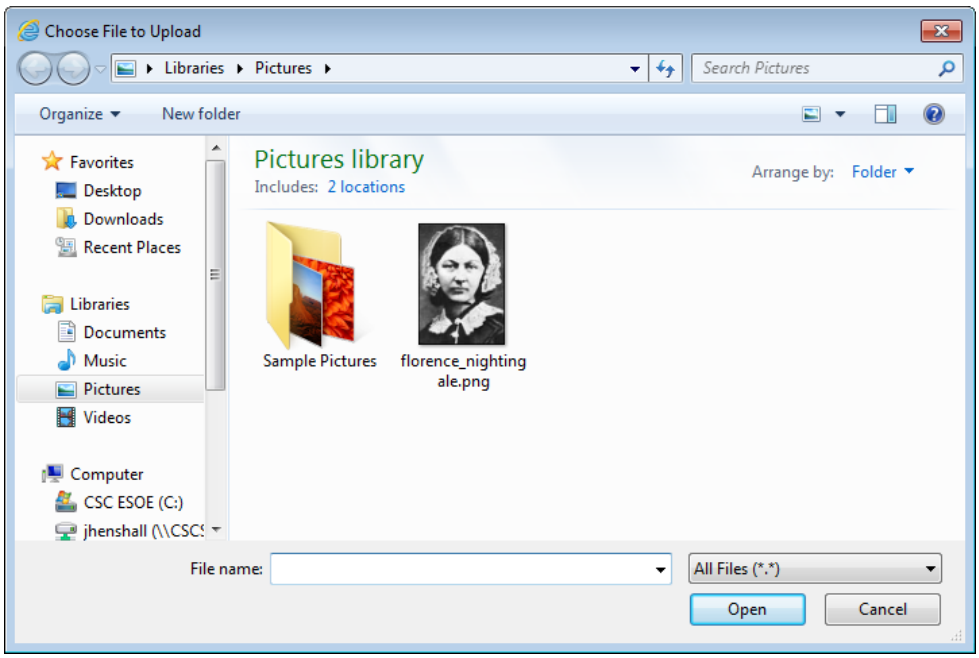
3.3.4.1 Adding a Patient Photograph

1. Locate the required patient.
2. Select **Add Photo ID** from the appropriate patient level drop down menu.

The Photo ID Maintenance template will display.



3. Click **Browse**.
4. Select the appropriate file to be attached.



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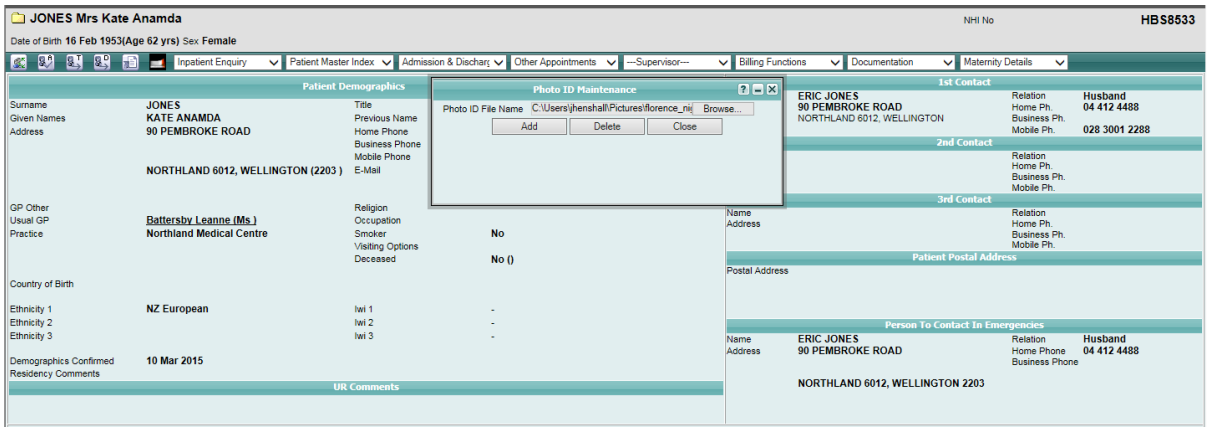
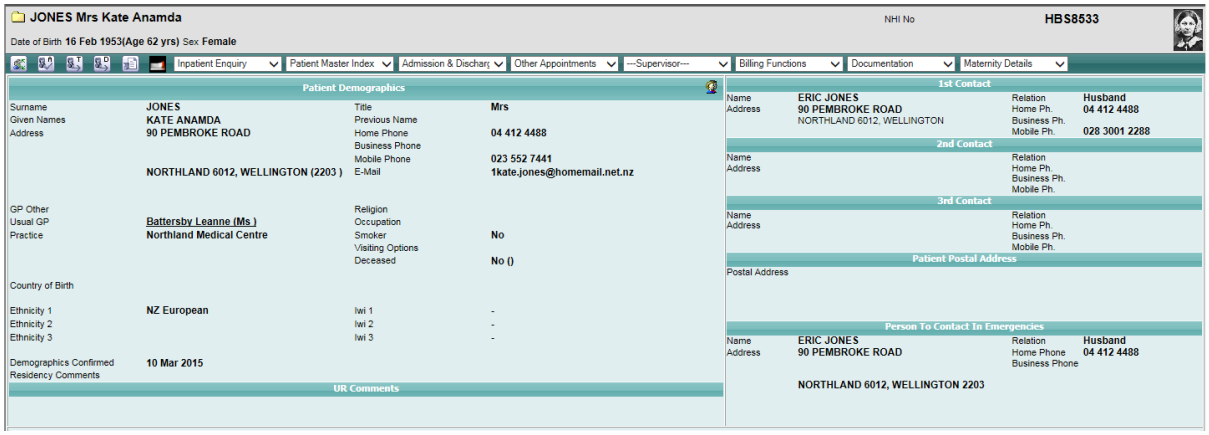
This file will then be stored in the directory ../images/patients using the NHI Number and an extension of .jpg

5. Click Open to select the file.



6. Click **Add** button to attach the photograph to the patient record.

The patient photograph will display in the patient header beside the NHI number.



3.3.4.2 Update a Patient Photo

To update a patient photo, follow the steps outlined in **Adding a Patient Photograph**.

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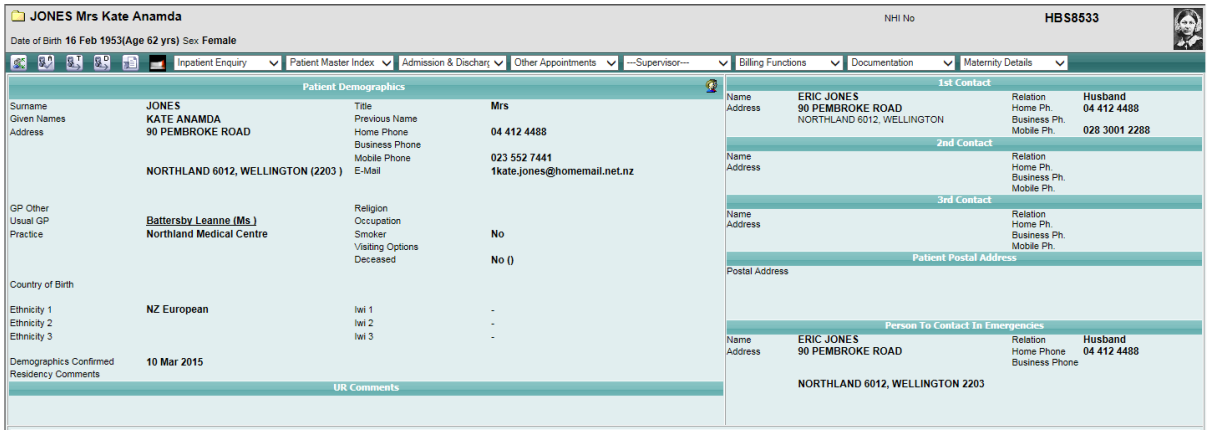
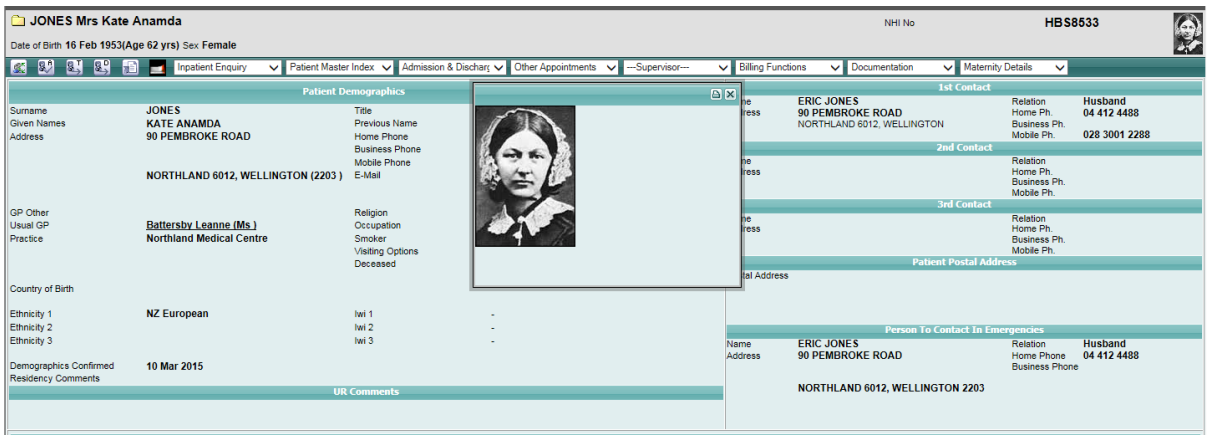
3.3.4.3 View a Patient Photo

1. Click on the photograph in the patient header.



The photograph will display in the centre of the page.



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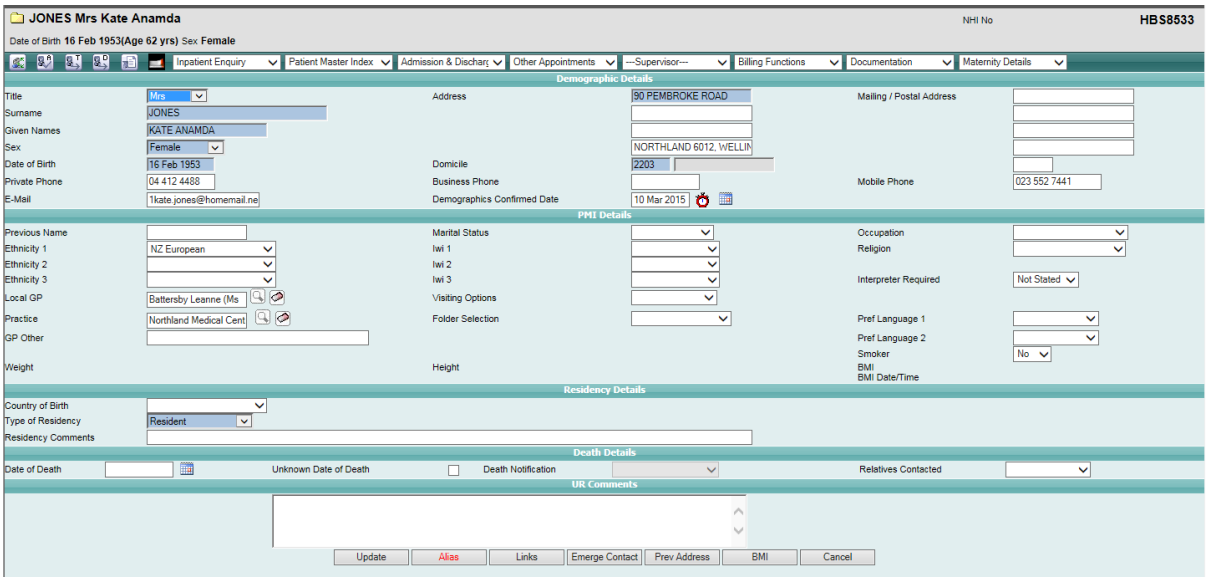
3.3.5 Patient BMI Information

Patient BMI (Body Mass Index) information can be recorded at a PMI Level or at a patient admission.

3.3.5.1 Adding BMI

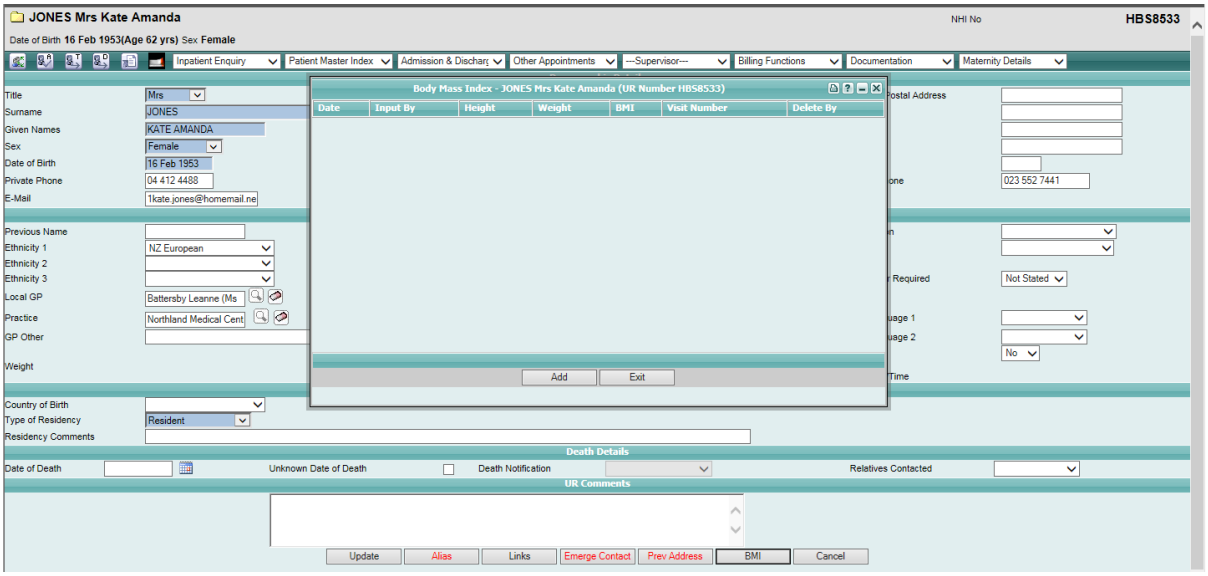
1. Locate the required patient.

2. Select **Update Patient Details** from the appropriate patient level drop down menu.



3. Click **BMI** or select from the appropriate patient level drop down menu.

The Body Mass Index screen will display.



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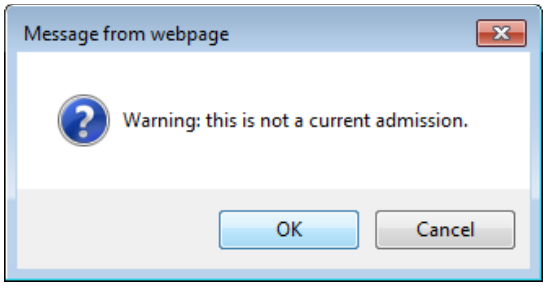
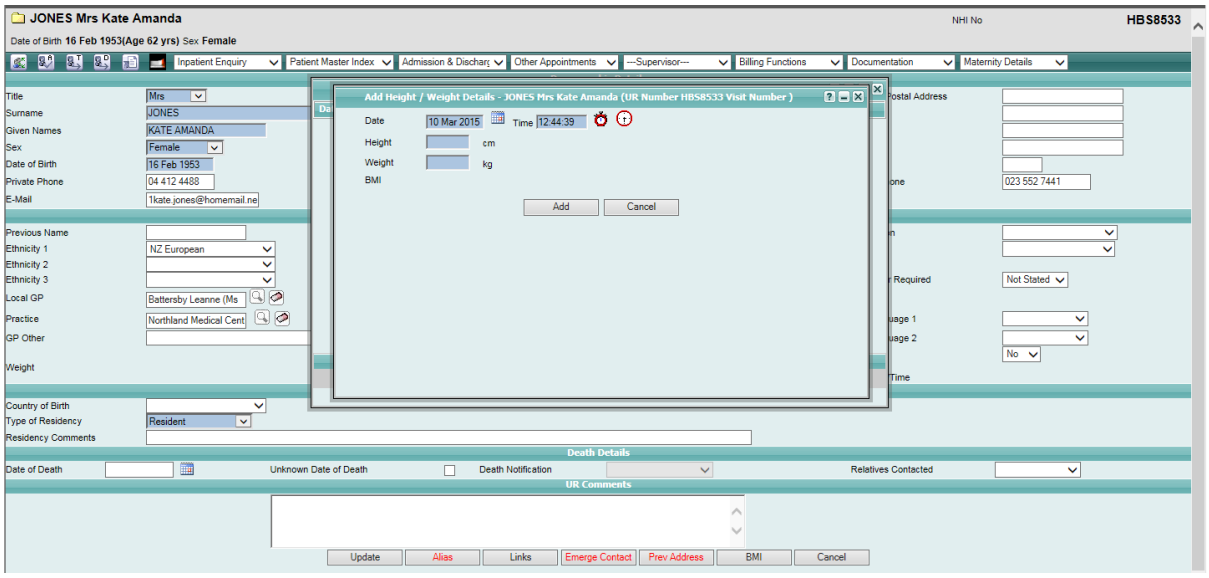
4. Click **Add**.

A warning is displayed if the patient is not a Current Inpatient.



5. Click **OK**.

The Add BMI details screen will display.



6. Enter the patient **Height** and **Weight**.

7. Click **Add.**

The record will be added and the BMI will be calculated and displayed.

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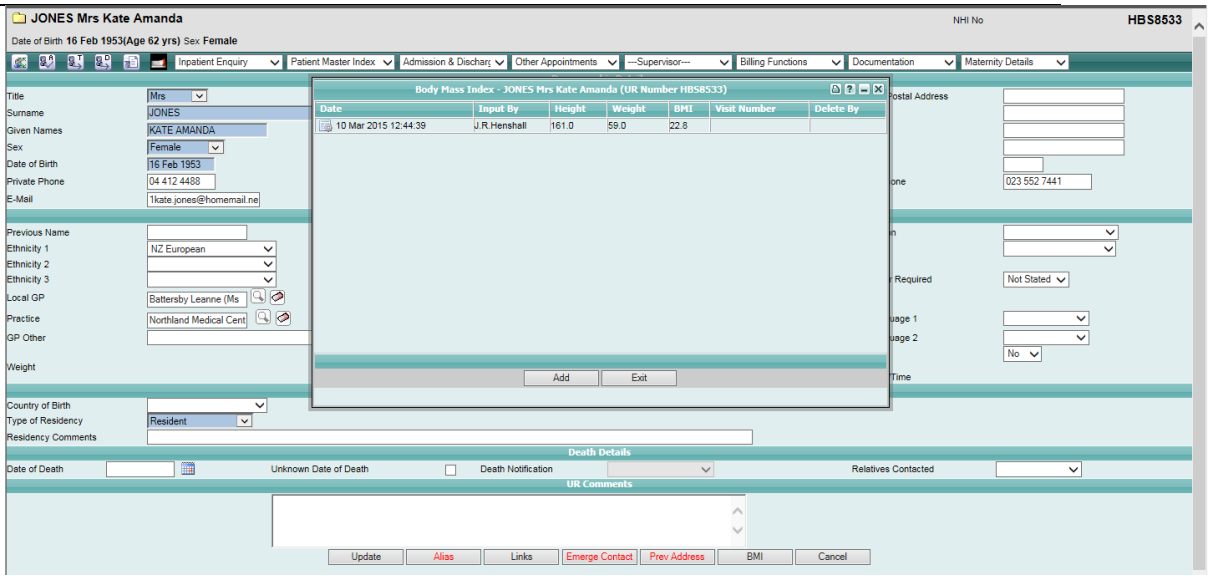
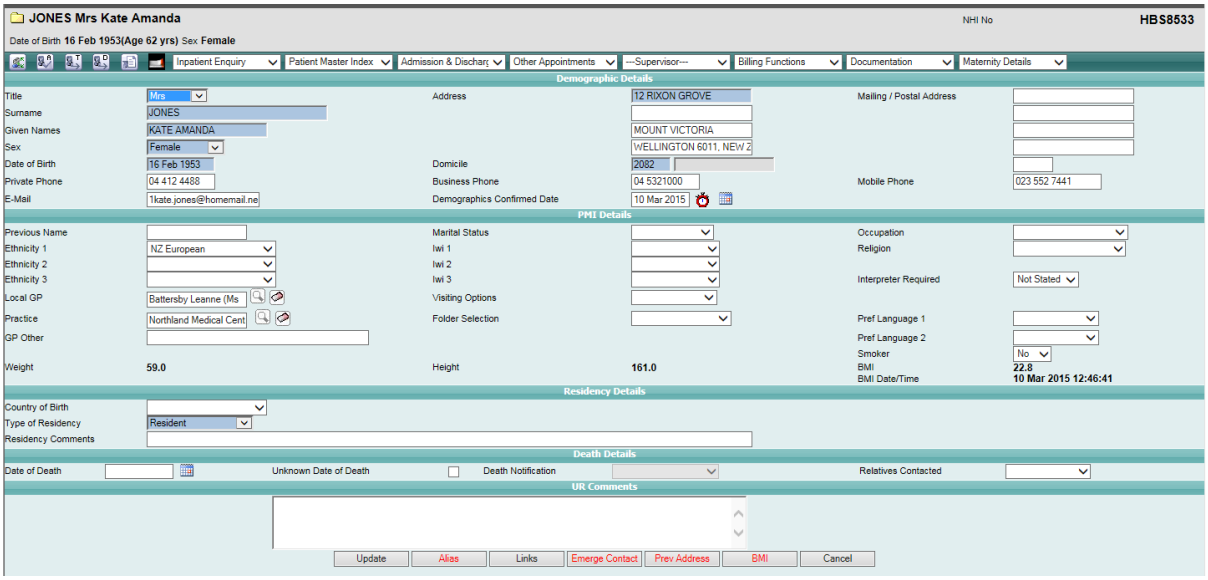


8. Click **Exit.**

The patient Weight, Height, BMI and Date added will display on the Patient Demographic screen.



9. Click **Update.**

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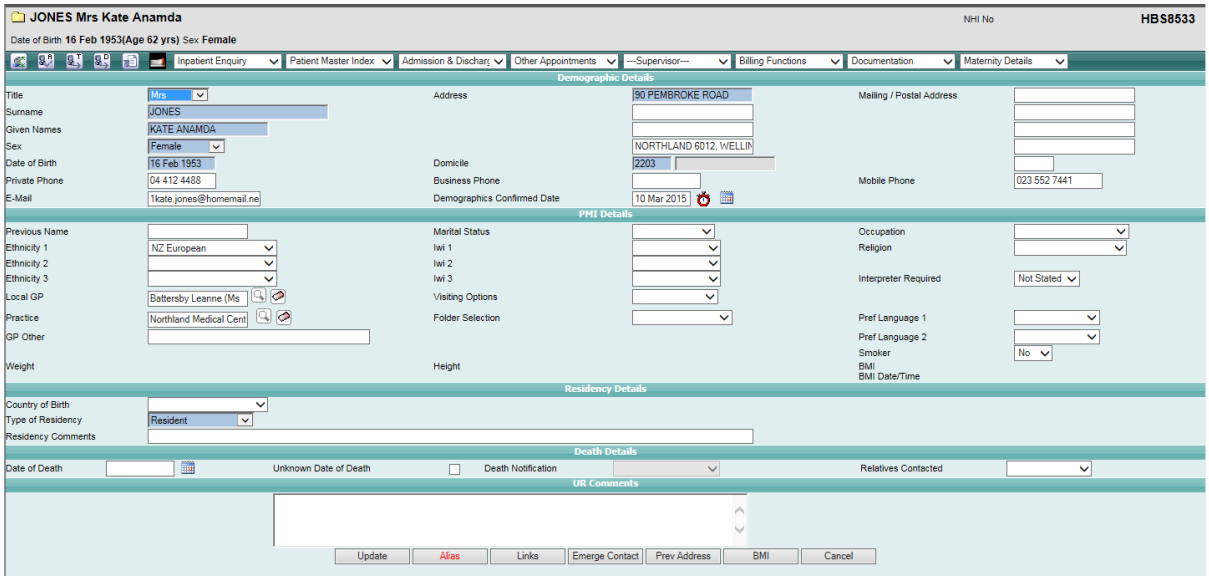
3.3.5.2 Updating BMI

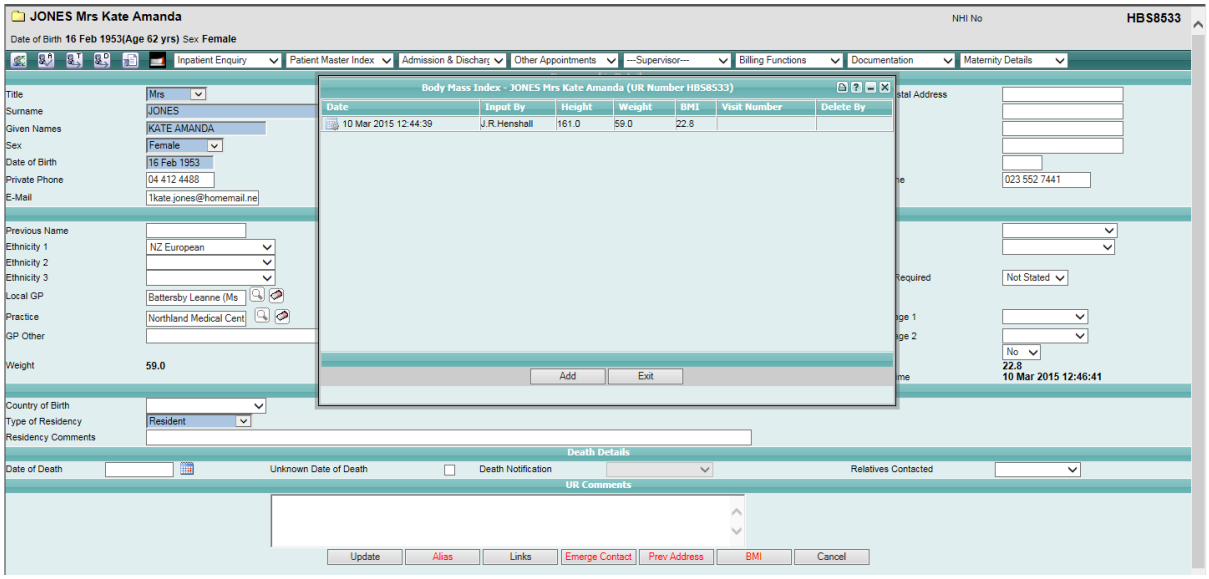
1. Locate the required patient.

2. Select **Update Patient Details** from the appropriate patient level drop down menu.



3. Click **BMI** or select from the appropriate patient level drop down menu.

The Body Mass Index screen will display.



4. Select the **BMI** record to be updated.

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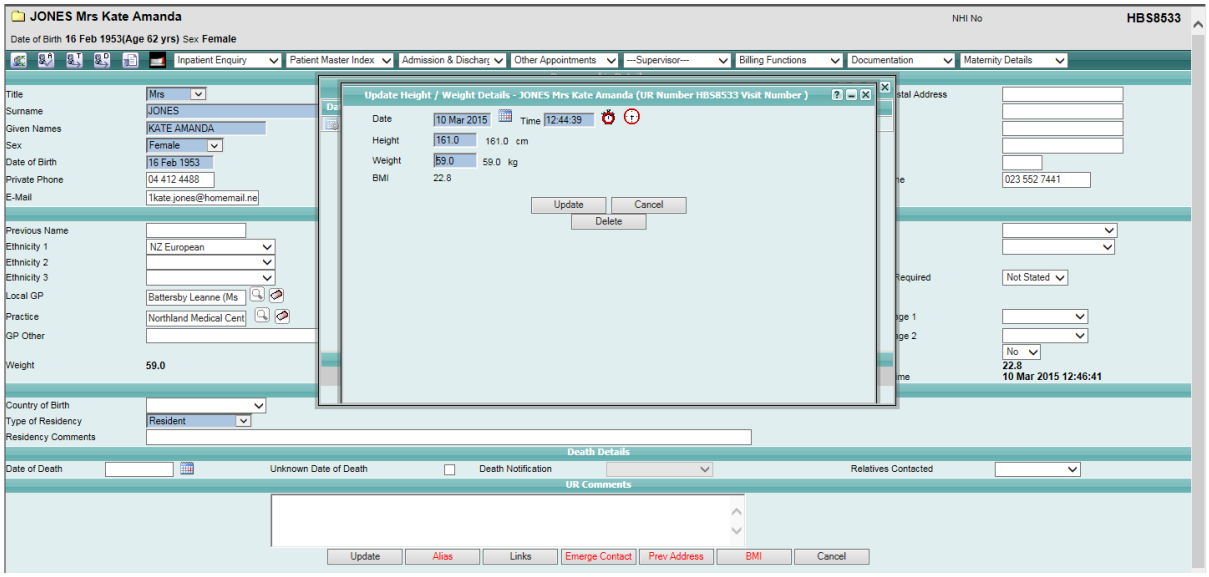
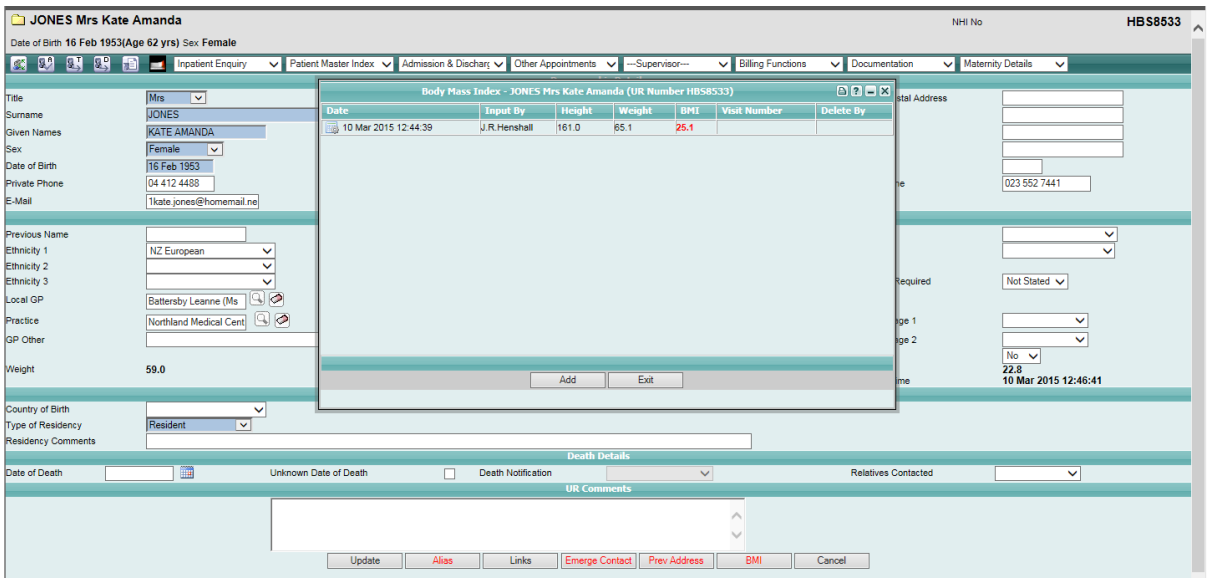
The Update BMI details screen will display.



5. Make the required changes. If the patient Height or Weight are changed the BMI will be re-calculated.

6. Click **Update**.

The updated record is saved and the BMI screen is displayed.



7. Click **Exit**.

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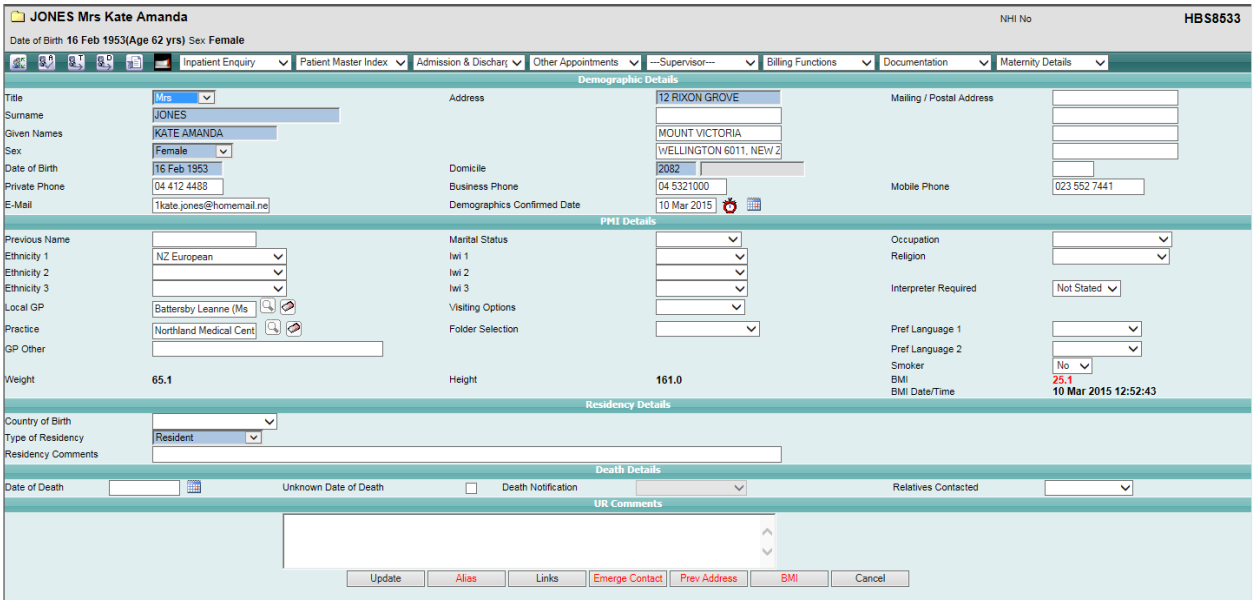
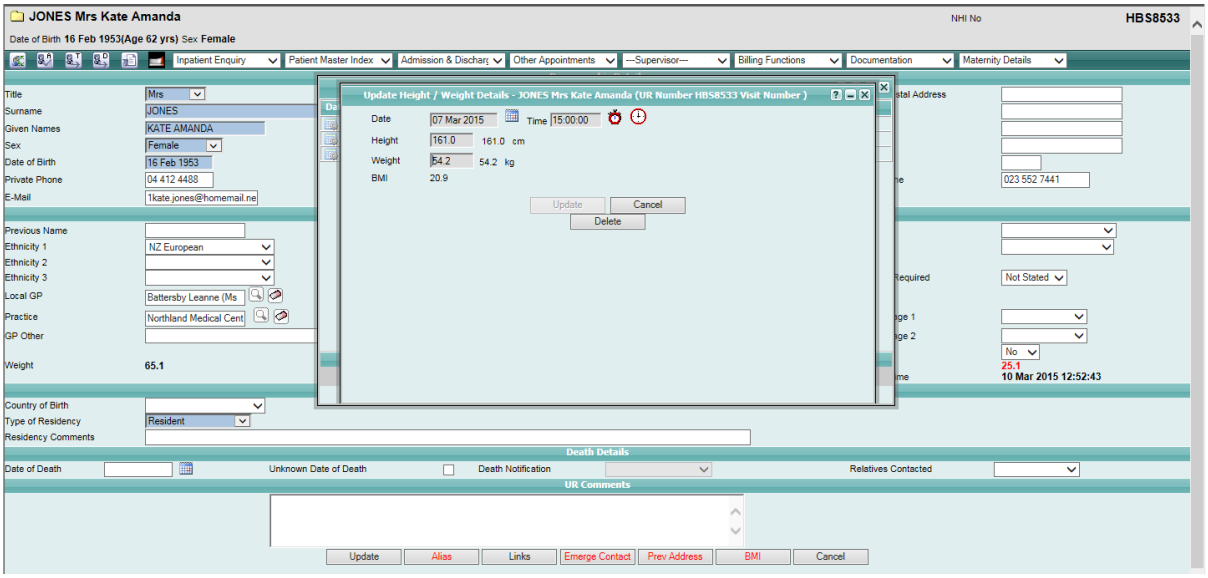
The updated patient Weight, Height, BMI and Date will display on the Patient Demographic screen.



8. Click **Update.**

Note: Only BMI records added on the current date can be updated. Records from previous dates have the fields greyed out and cannot be updated.



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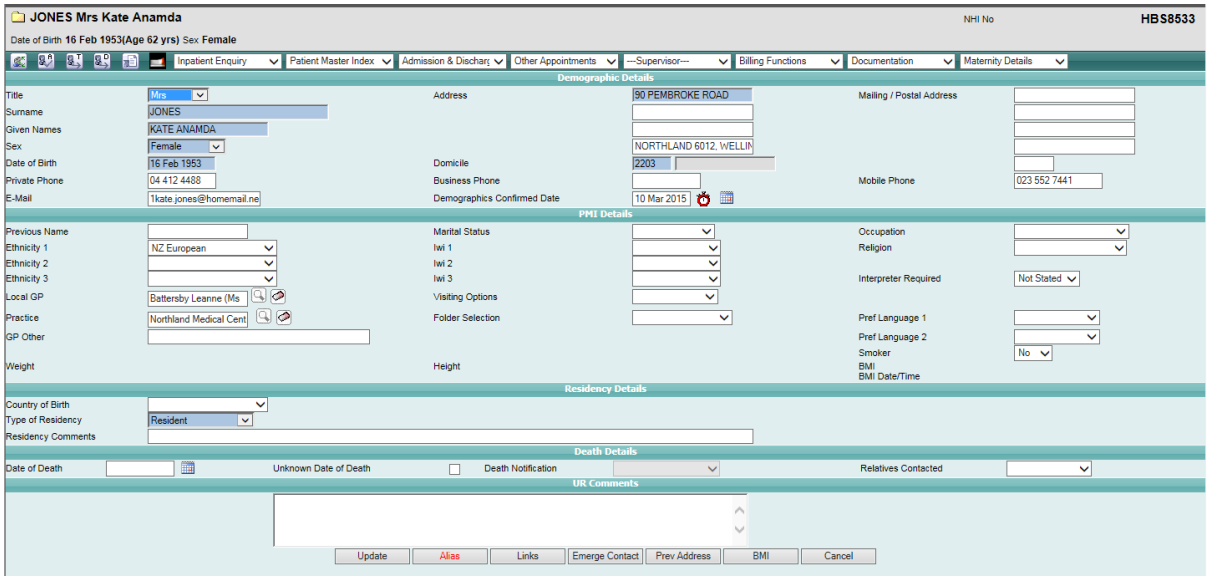
3.3.5.3 Deleting BMI

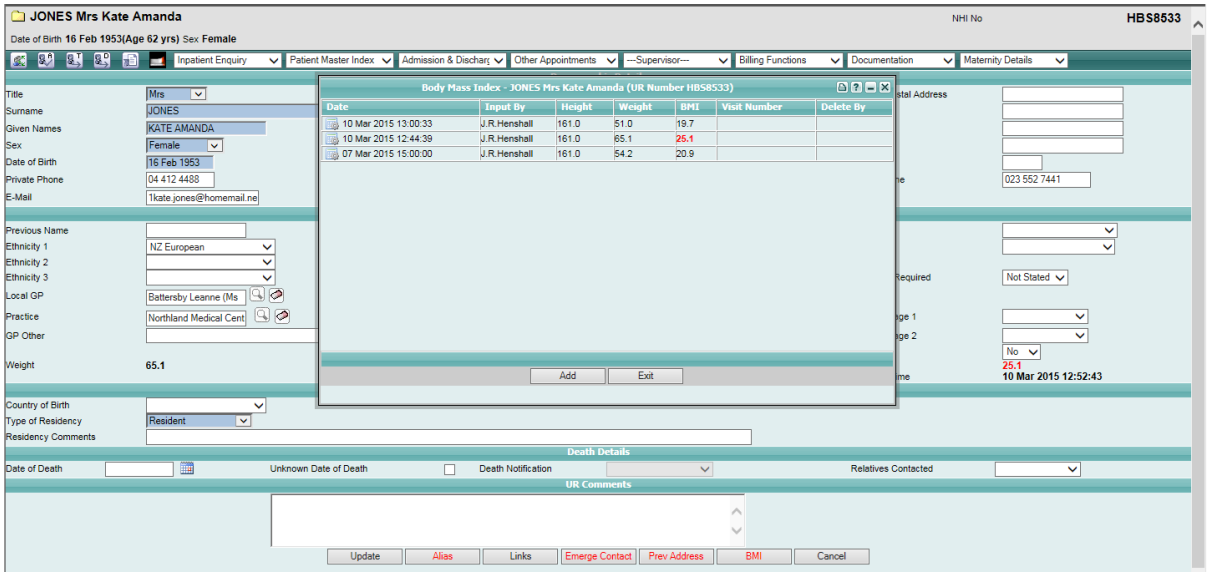
1. Locate the required patient.

2. Select **Update Patient Details** from the appropriate patient level drop down menu.



3. Click **BMI** or select from the appropriate patient level drop down menu.

The Body Mass Index screen will display.



4. Select the **BMI** record to be deleted.

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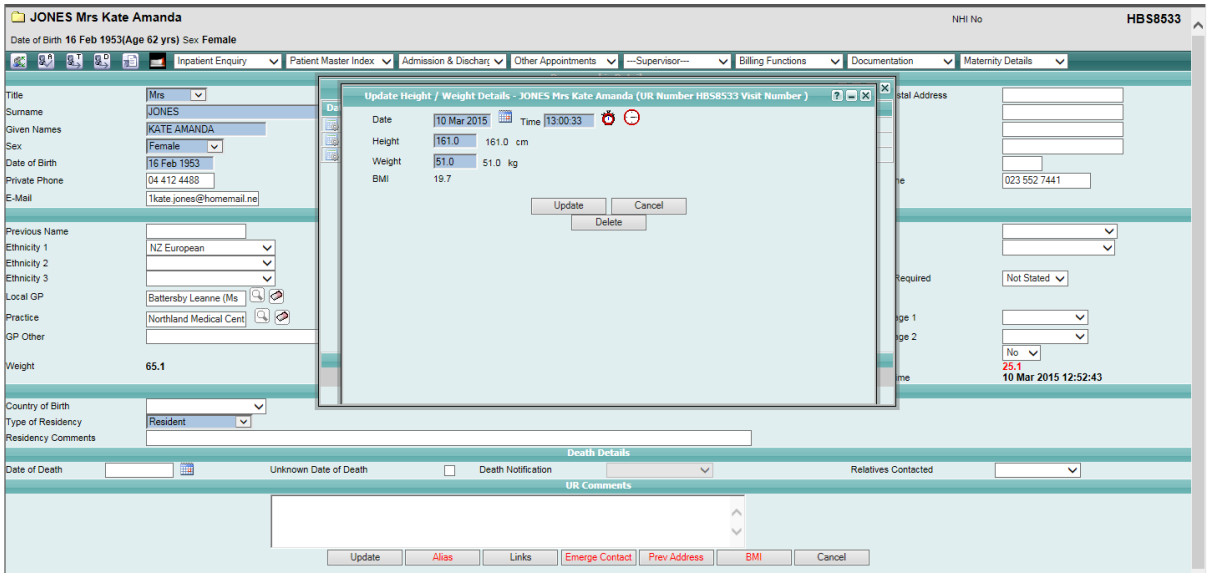
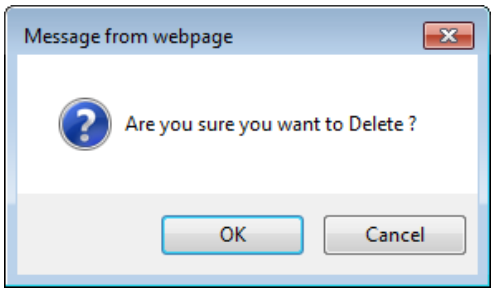
The Update BMI details screen will display.



5. Click **Delete**.

A warning message will be displayed.



6. Click **OK**.

The record is deleted and the BMI screen is displayed.

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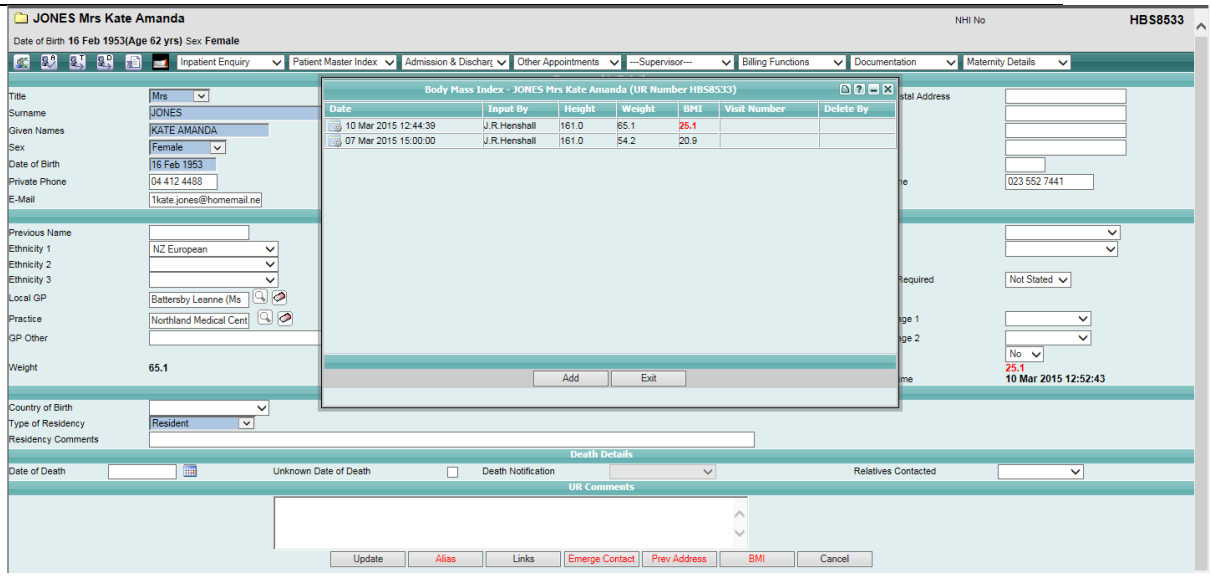
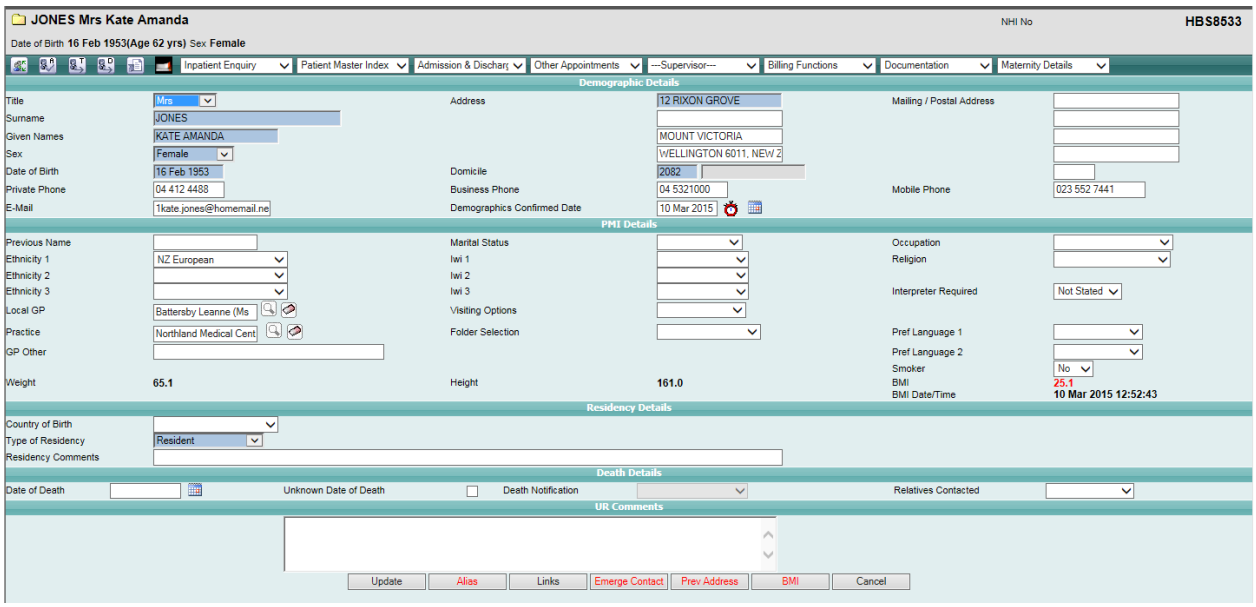


7. Click **Exit**.

The updated patient Weight, Height, BMI and Date will display on the Patient Demographic screen.



8. Click **Update.**

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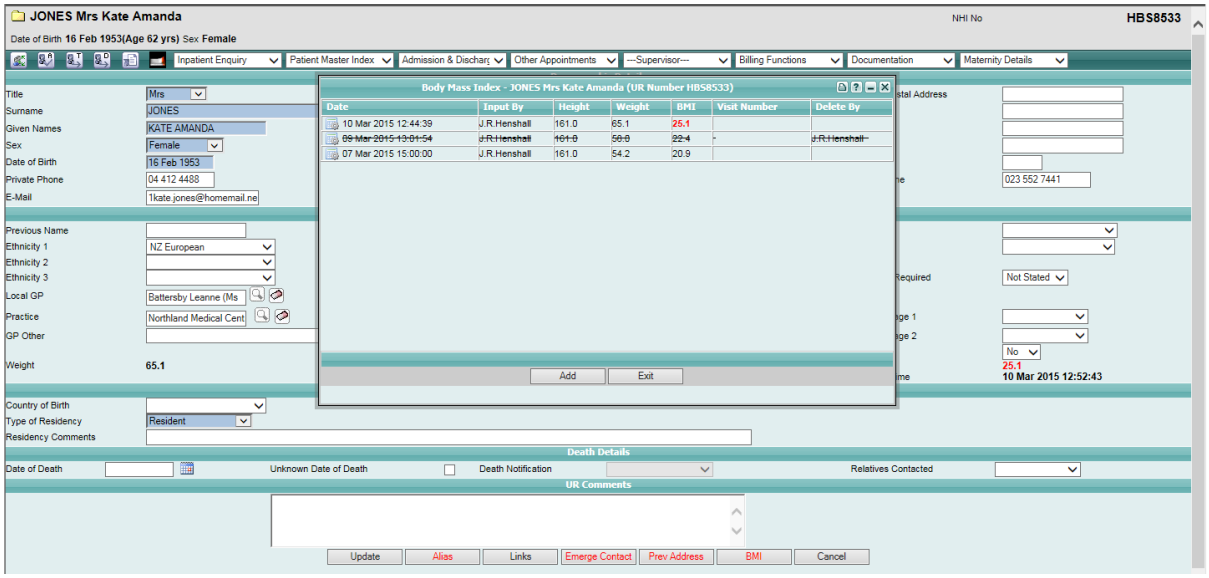
Note: Only BMI records added on the current date can be completely deleted. Records from previous dates are still displayed, but have a strikethrough through the record.



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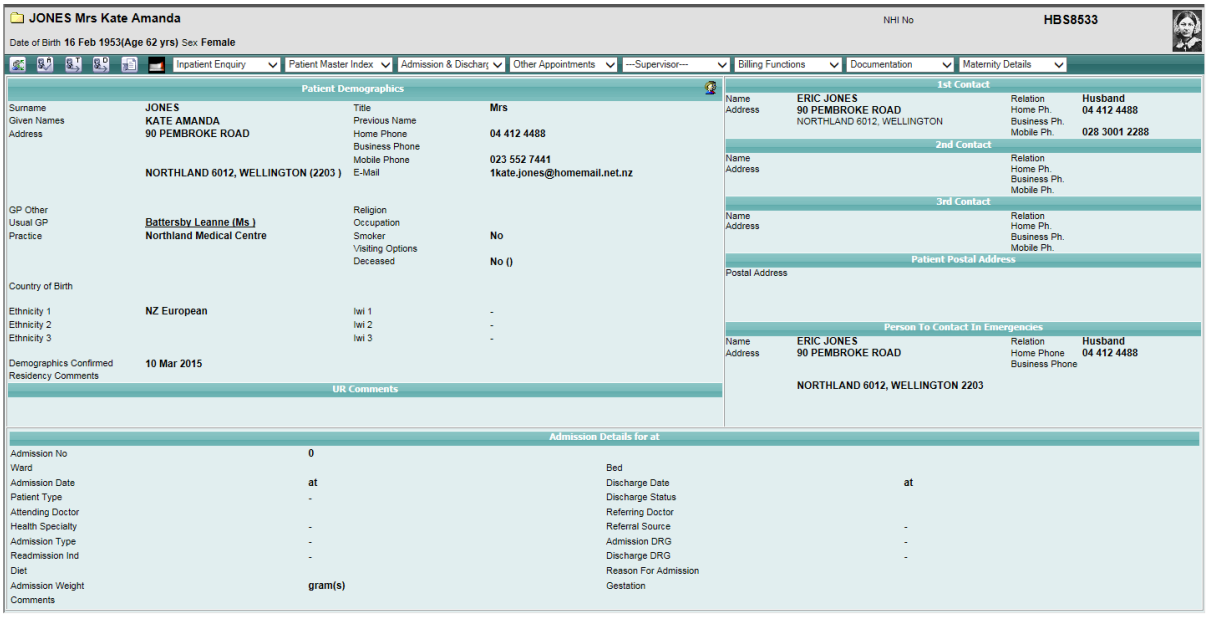
3.4 Updating Patient Registration Information

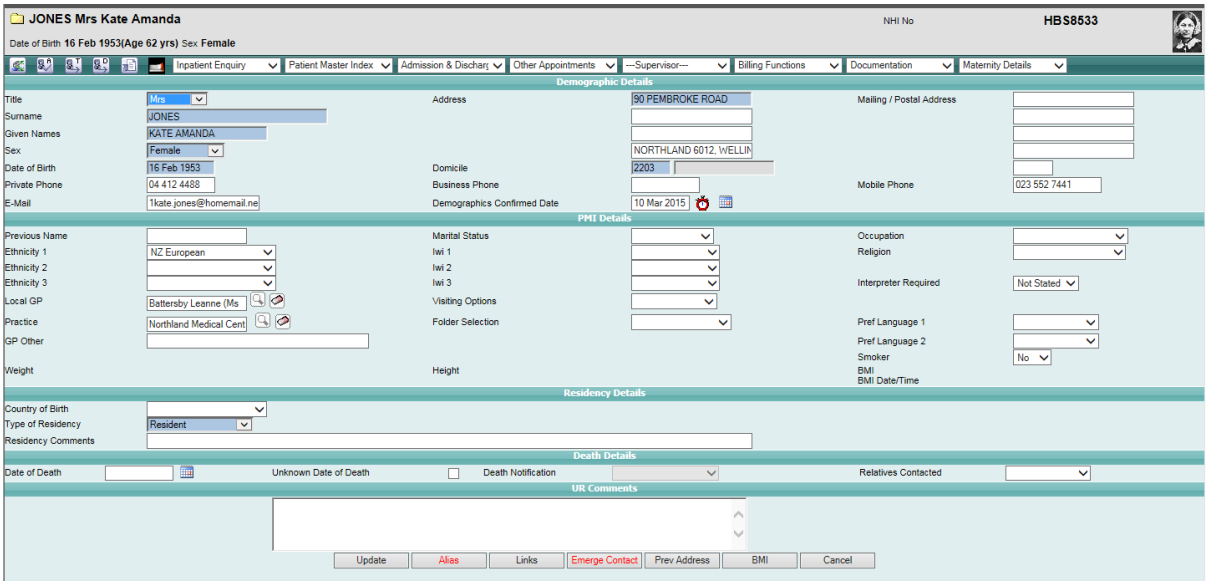
Once registered, a patient's details can be updated or additional information can be added.

1. Locate the required patient.



2. Select **Update Patient Details** from the appropriate patient level drop down menu.

The following template will display.



3. Change the details as required.

4. Update the **Demographics Confirmed Date**.

5. Click **Update**.

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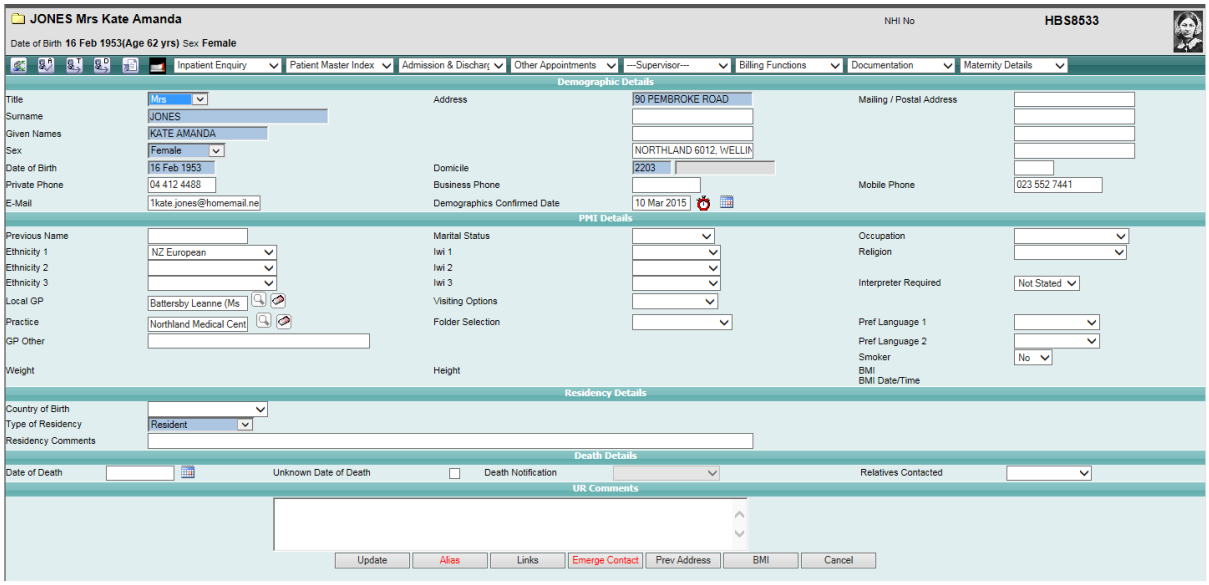
3.4.1 Updating NHI Basic Details

If fields recorded on the NHI (Name, Address, Sex, Date of Birth, Ethnicity and Residency) are needed to be changed these need to be done directly on the NHI system.

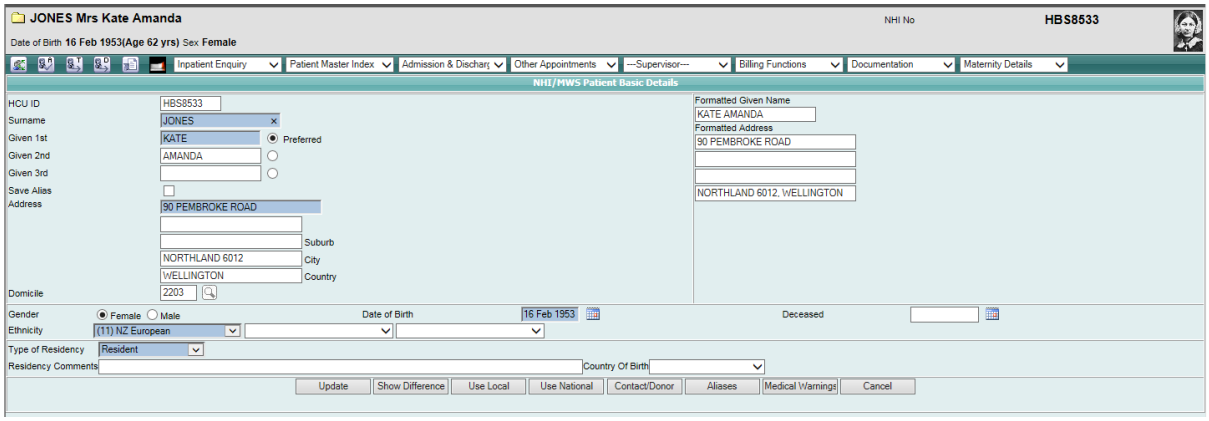
1. Locate the required patient.

2. Select **Update Patient Details** from the appropriate patient level drop down menu.



3. Click on one of the NHI fields.

The NHI/MWS Patient Basic Details screen displays.



4. Make the changes required.

5. Click **Update**.

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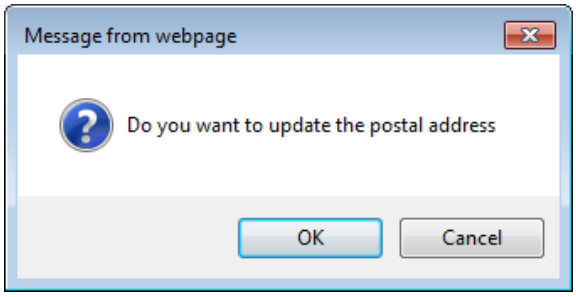
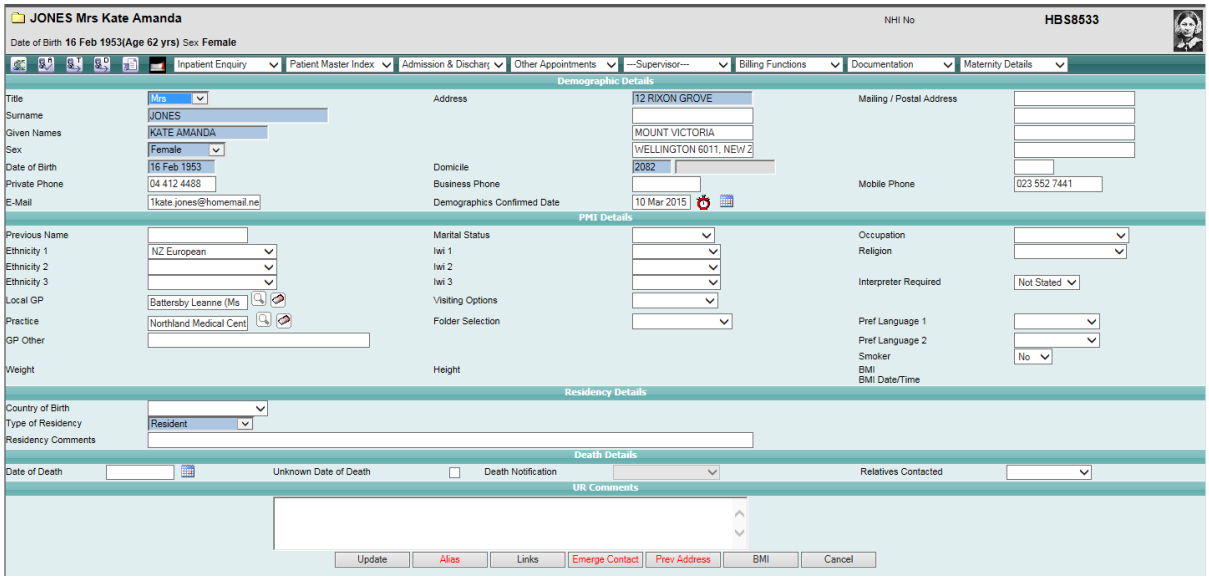
A message asks if you want to update the Patients Postal Address.



6. Click **OK** to be taken to the patients Emergency Contacts screen, where the Postal Address can be updated. Click **Cancel** to return to the Patients Demographic screen.

The Updated NHI details will be dislayed in the Patient Demographic details also.



7. Click **Update**.

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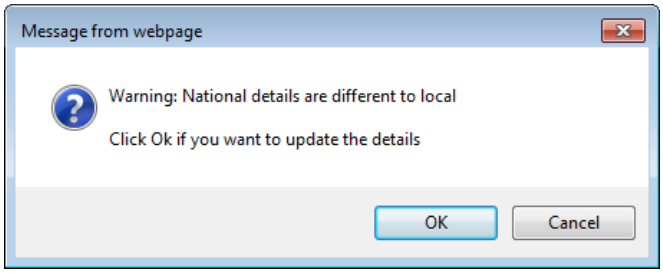
3.4.2 NHI Details differ to Local Details

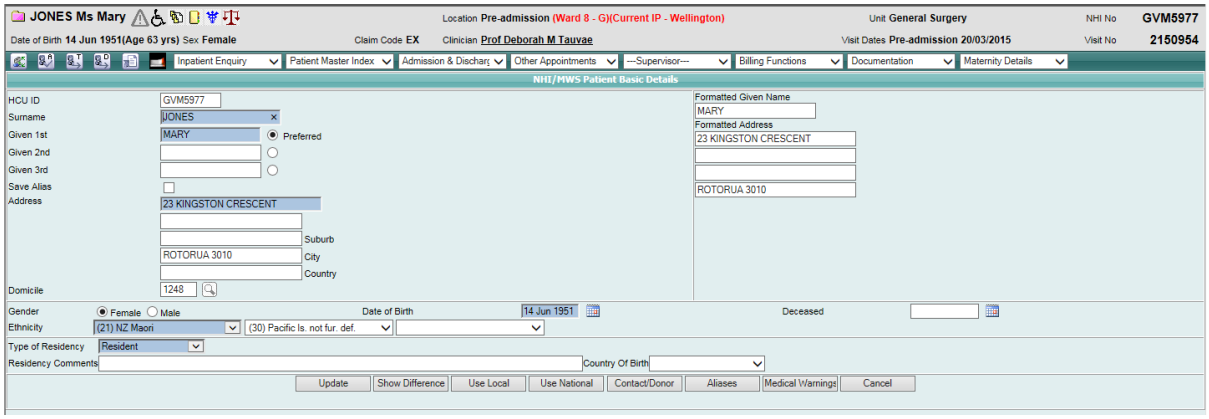
If fields recorded on the NHI (Name, Address, Sex, Date of Birth, Ethnicity and Residency) differ from those held on the Local Hospital database a warning message will be displayed advising there are differences.

Whenever a patient is accessed a check is done between the Local Hospital database and the NHI and if any fields held on the NHI differ to those held locally a warning is displayed.

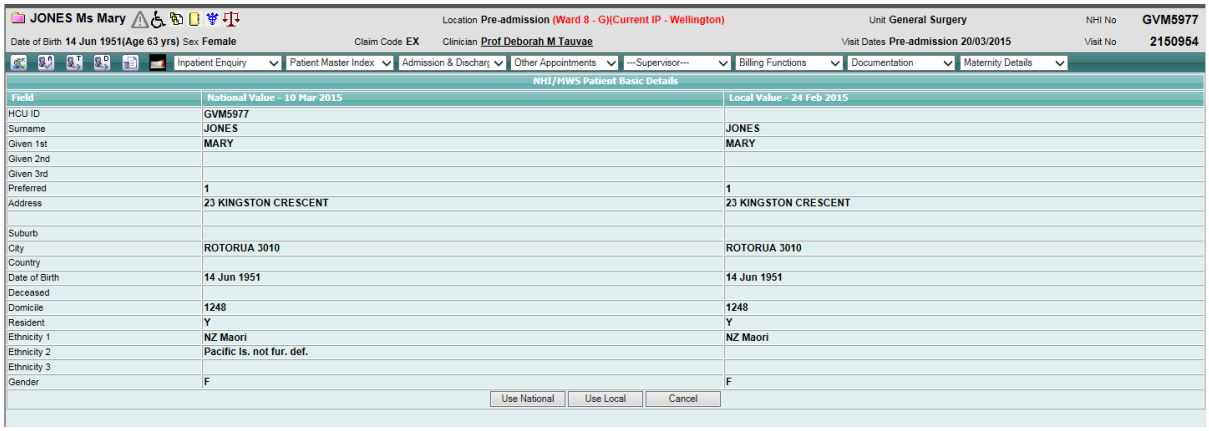


1. Click **OK**.

The NHI/MWS Patient Basic Details screen displays.



2. Click the **Show Difference** button to show details of the NHI and local database side by side.



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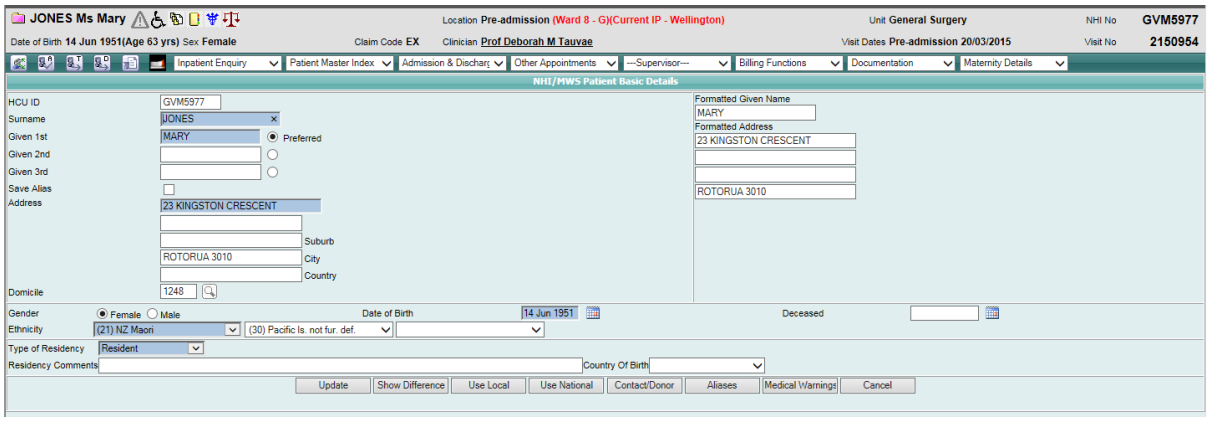
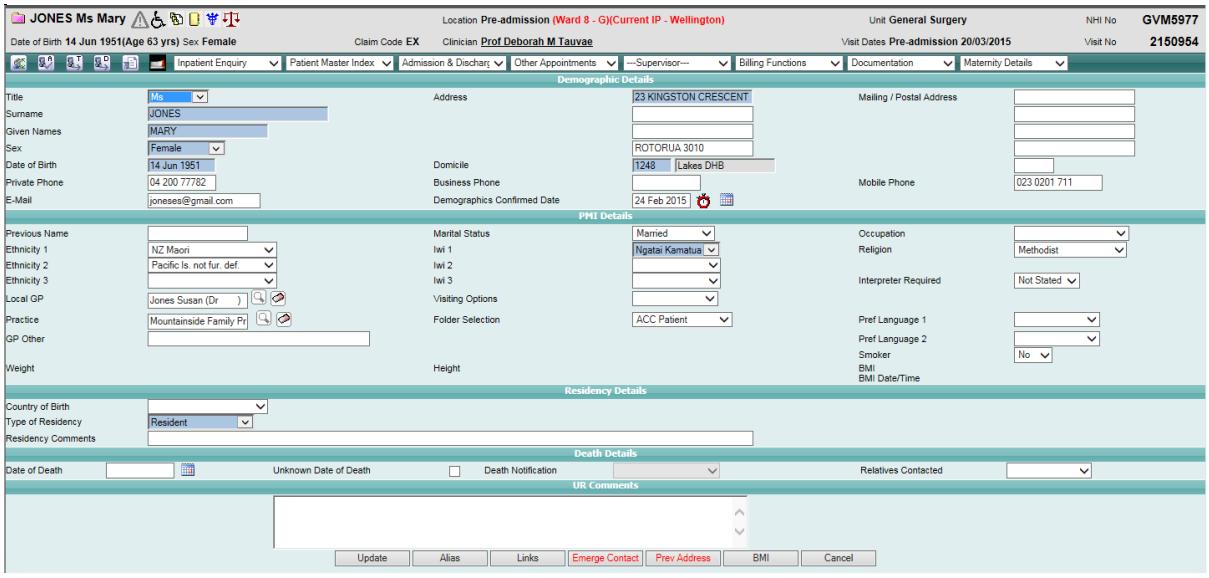
3. Compare the details and decide whether to **Use National** or **Use Local** details, depending on which are more accurate. The date each system was last updated is at the head of each system column.



4. Click **Update**.

The Updated NHI details will be dislayed in the Patient Demographic details also.



5. Click **Update**.

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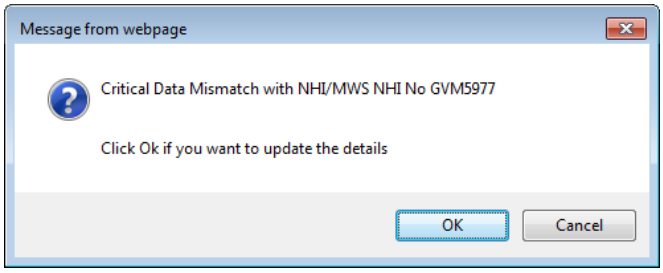
3.4.3 Critical NHI Details differ to Local Details

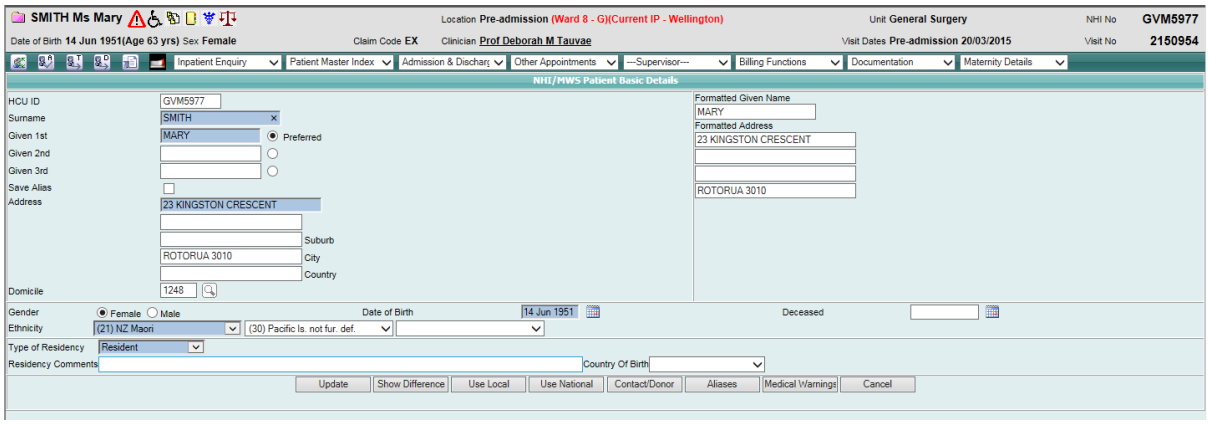
If critical fields recorded on the NHI (Surname) differ from those held on the Local Hospital database a warning message will be displayed advising there are differences.

Whenever a patient is accessed a check is done between the Local Hospital database and the NHI and if any fields held on the NHI differ to those held locally a warning is displayed.

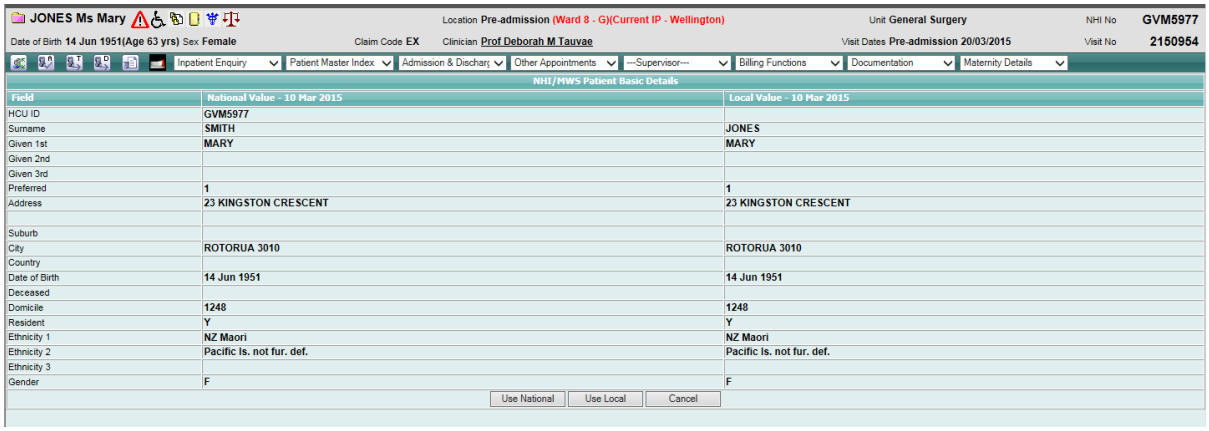


1. Click **OK**.

The NHI/MWS Patient Basic Details screen displays.



2. Click the **Show Difference** button to show details of the NHI and local database side by side.



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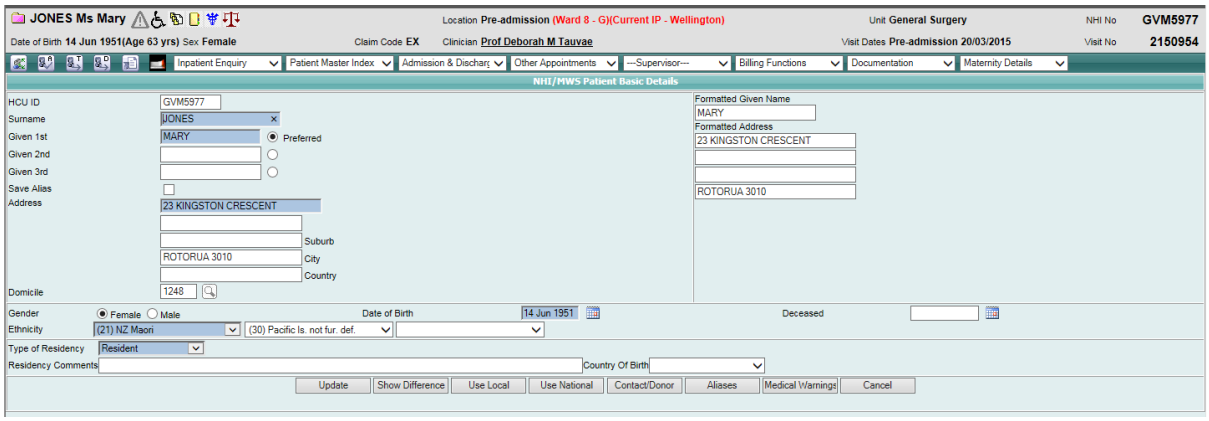
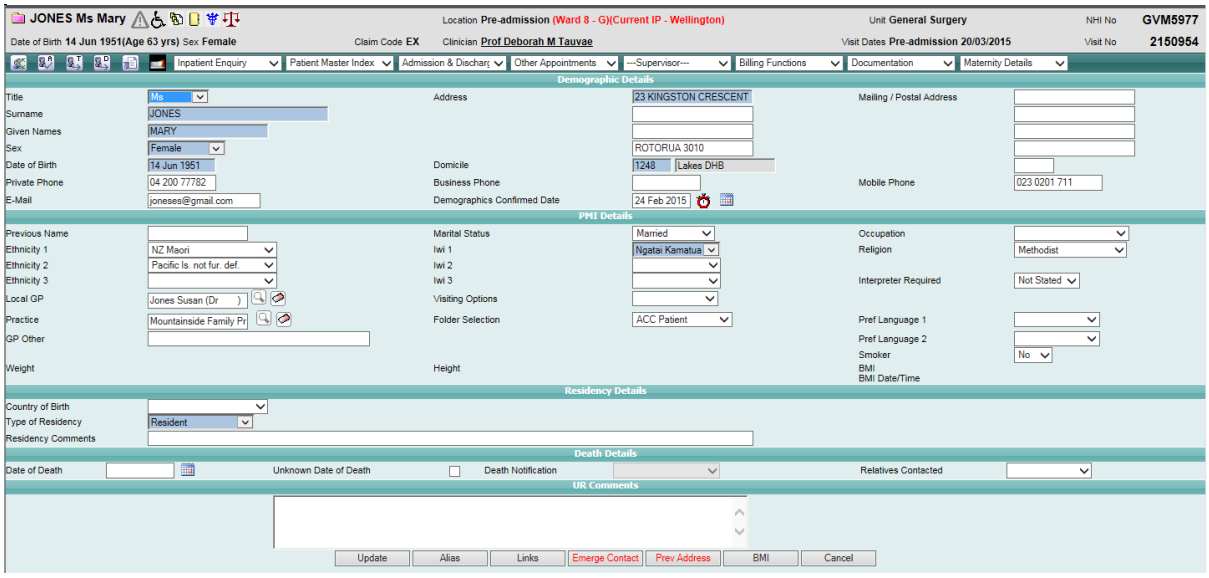
3. Compare the details and decide whether to **Use National** or **Use Local** details, depending on which are more accurate. The date each system was last updated is at the head of each system column.



4. Click **Update**.

The Updated NHI details will be dislayed in the Patient Demographic details also.



5. Click **Update**.

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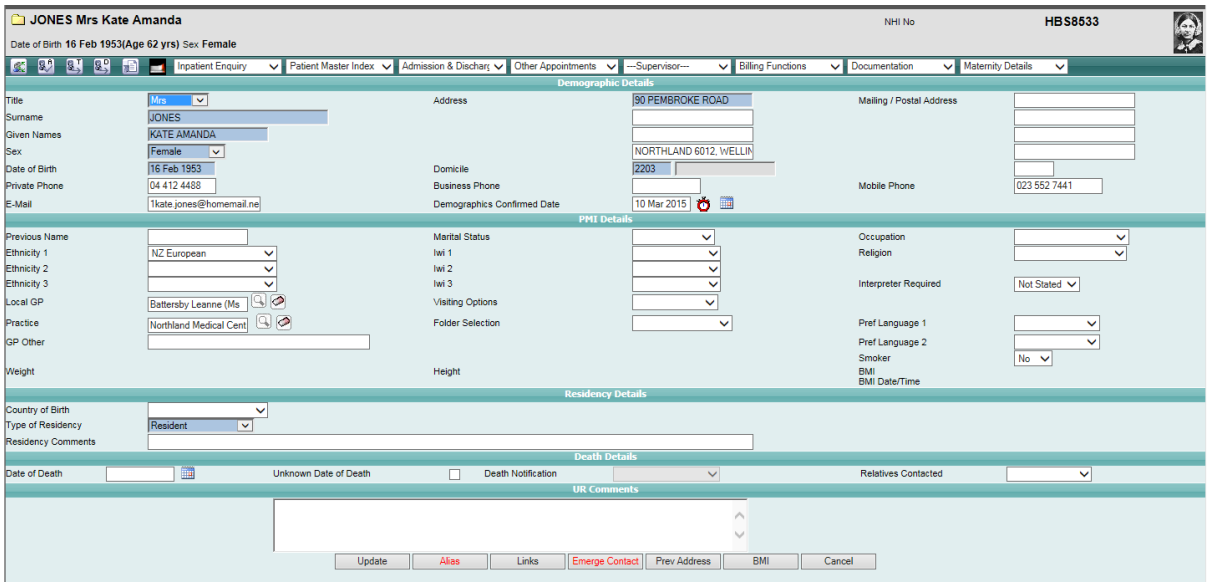
3.5 Previous Address Information

3.5.1 Viewing Previous Addresses

When updating patient address details, the system provides users with the option to archive the old address.

1. Locate the required patient.

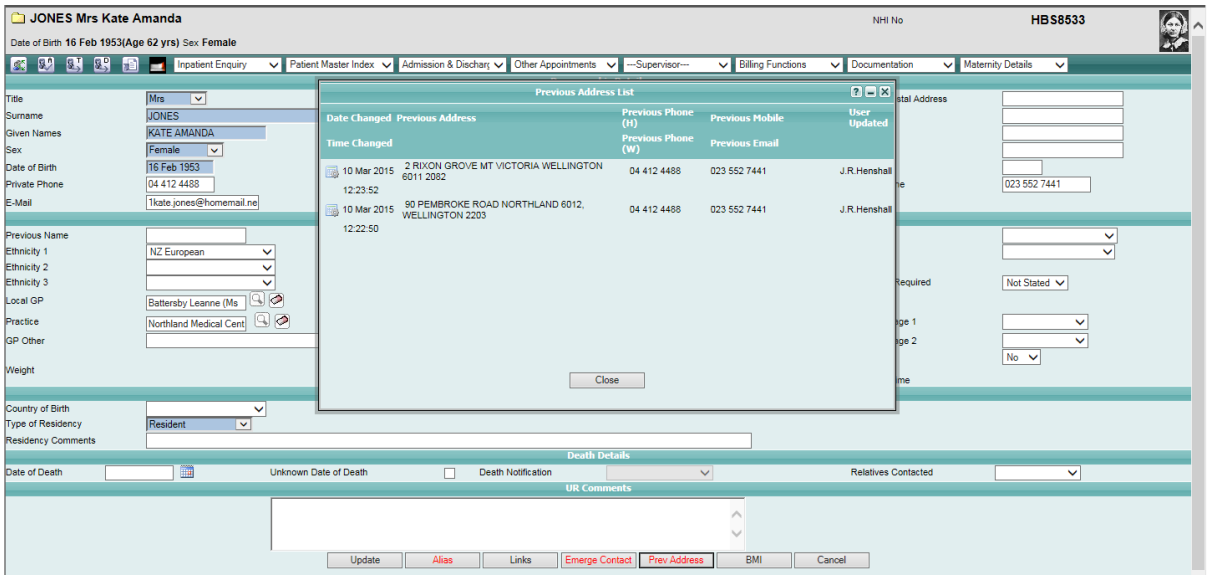
2. Select **Update Patient Details** from the appropriate patient level drop down menu.



Note: The Prev Address button text displays in red, indicating that Previous Address records exist.

3. Click **Prev Address**.

The patients Previous Address List will display.



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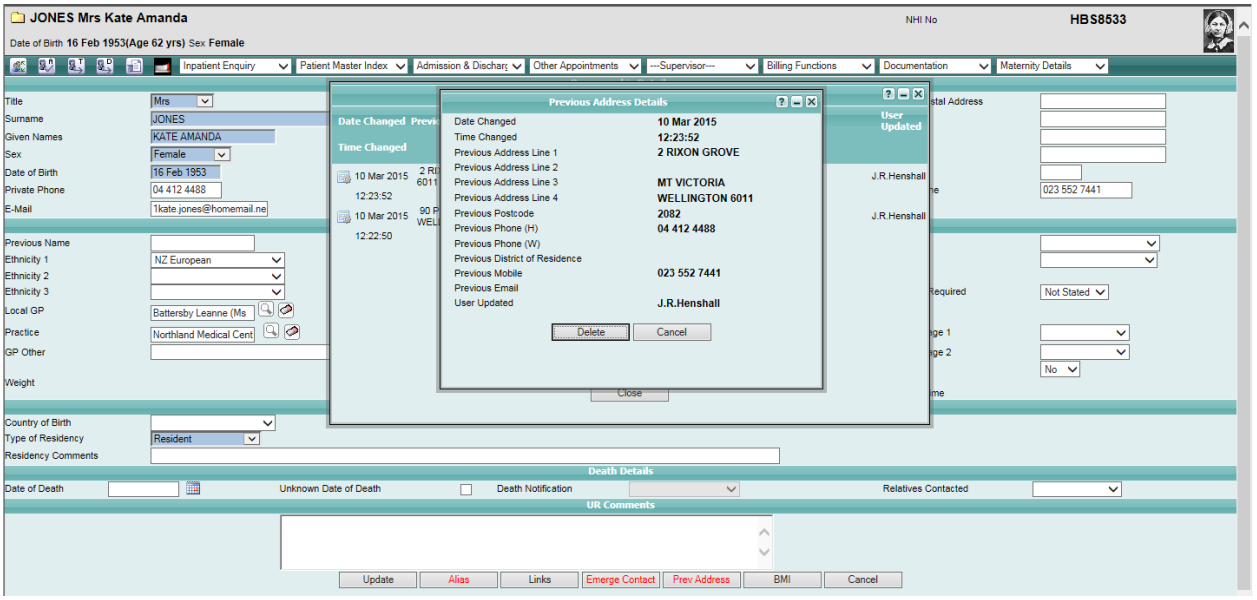
Click the icon beside a Previous Address record to view the details.



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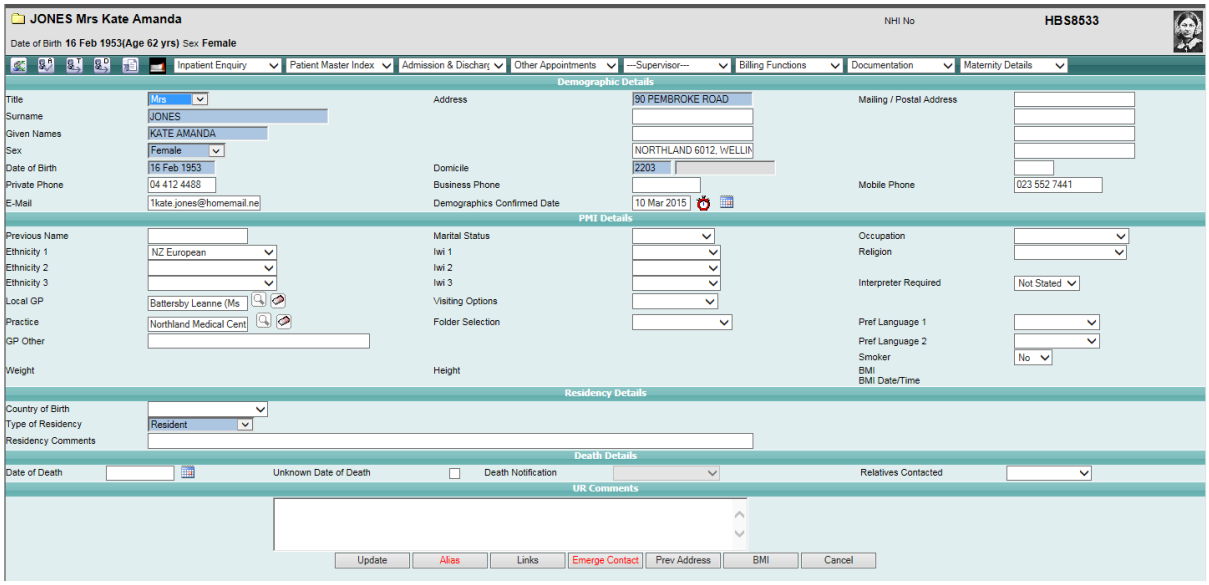
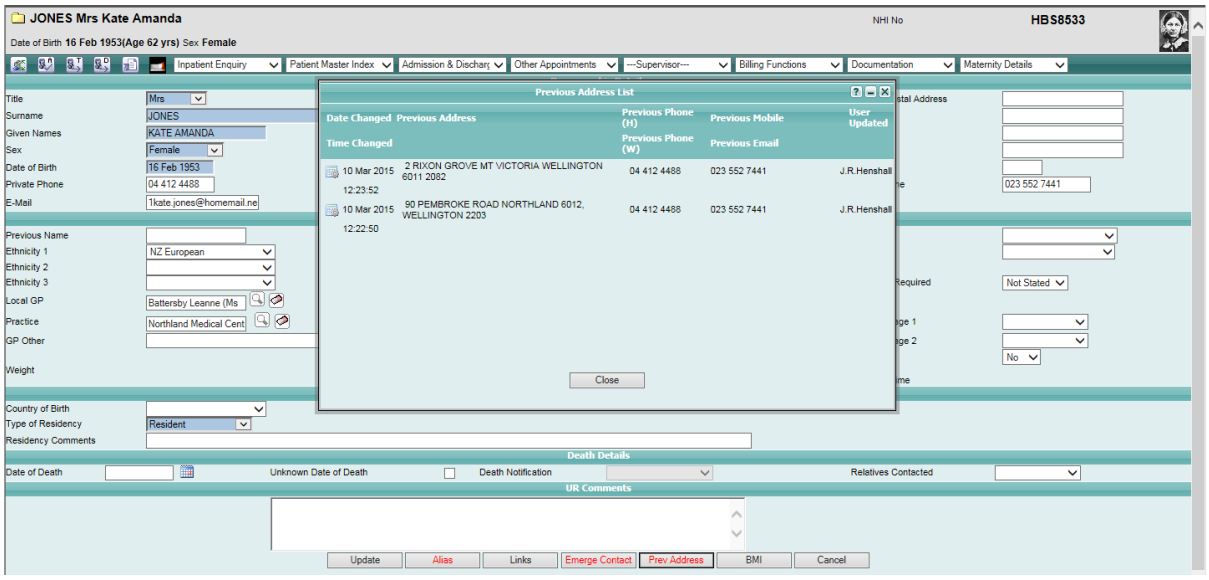
3.5.2 Deleting a Previous Address

1. Locate the required patient.

2. Select **Change Patient Details** from the appropriate patient level drop down menu.



3. Click the **Prev Address** button.



4. Click the icon beside a Previous Address record.

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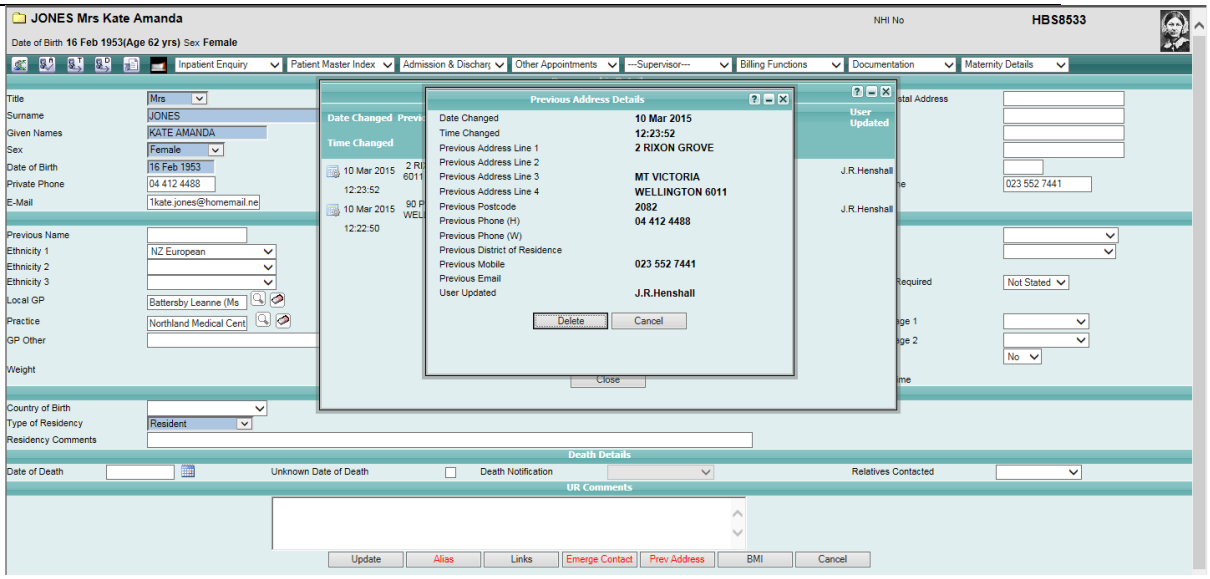
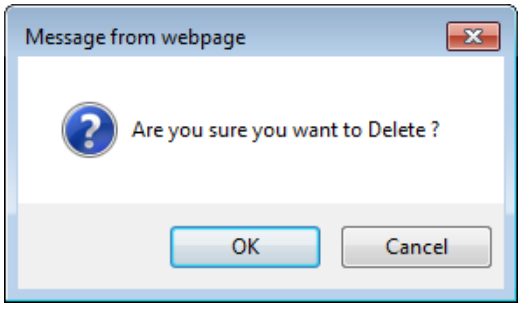


5. Click **Delete**.

The following confirmation message will display.



6. Click **OK** to delete the Previous Address record.

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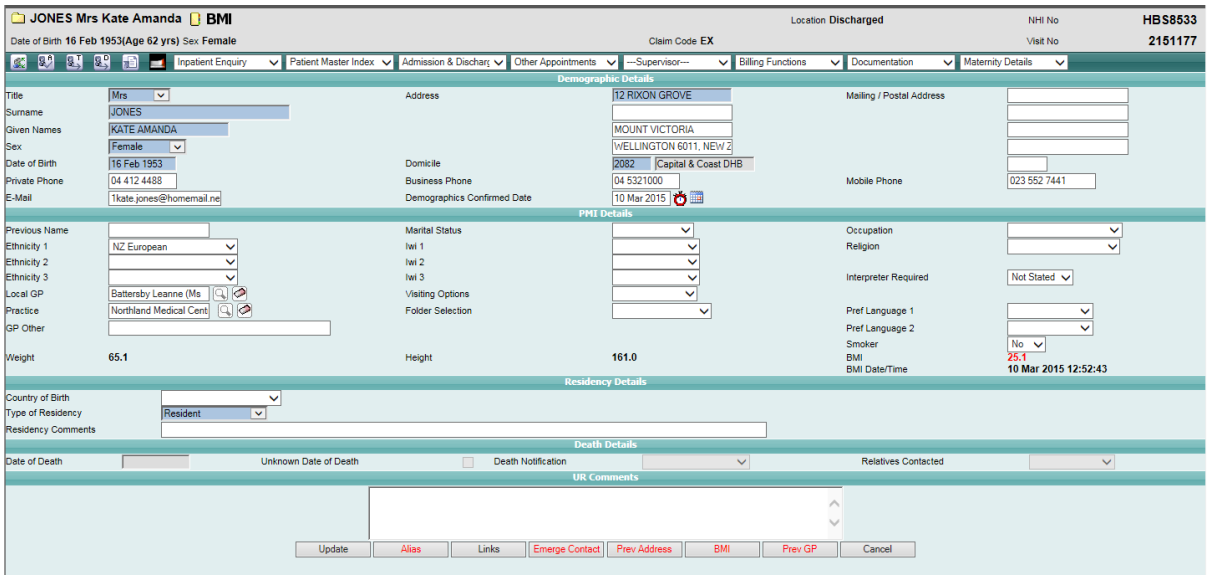
3.6 Previous GP and Practice Information

3.6.1 Viewing Previous GP's and Practices

When updating patient GP and Practice details, the system provides users with the option to archive the old GP information.

1. Locate the required patient.

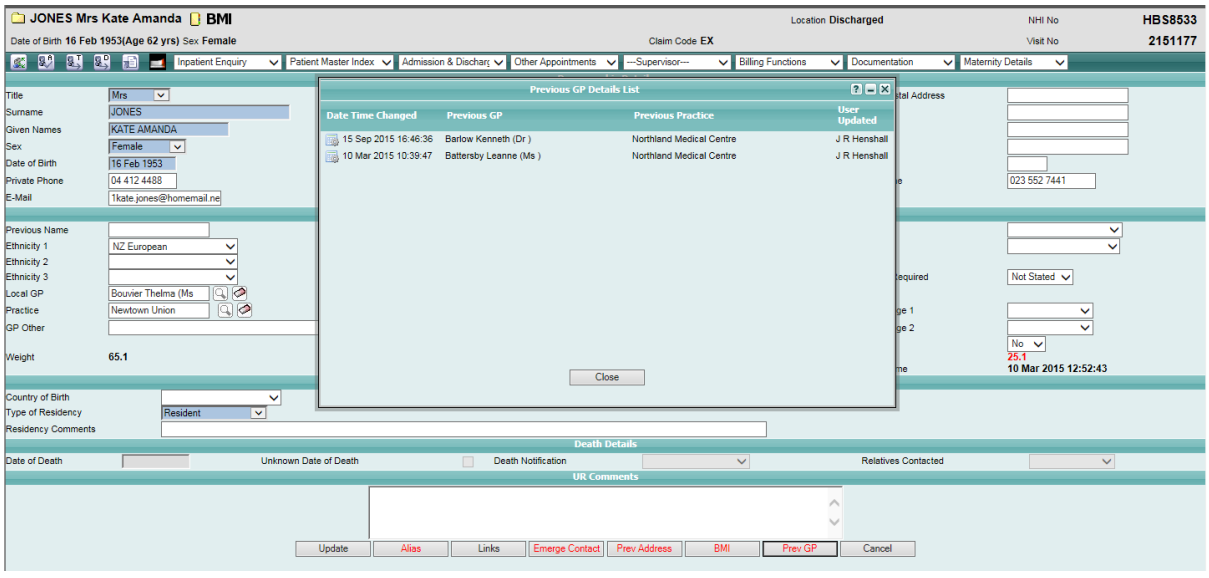
2. Select **Update Patient Details** from the appropriate patient level drop down menu.



Note: The Prev GP button text displays in red indicating that Previous GP records exist.

3. Click **Prev GP**.

The patients Previous GP Details List will display.



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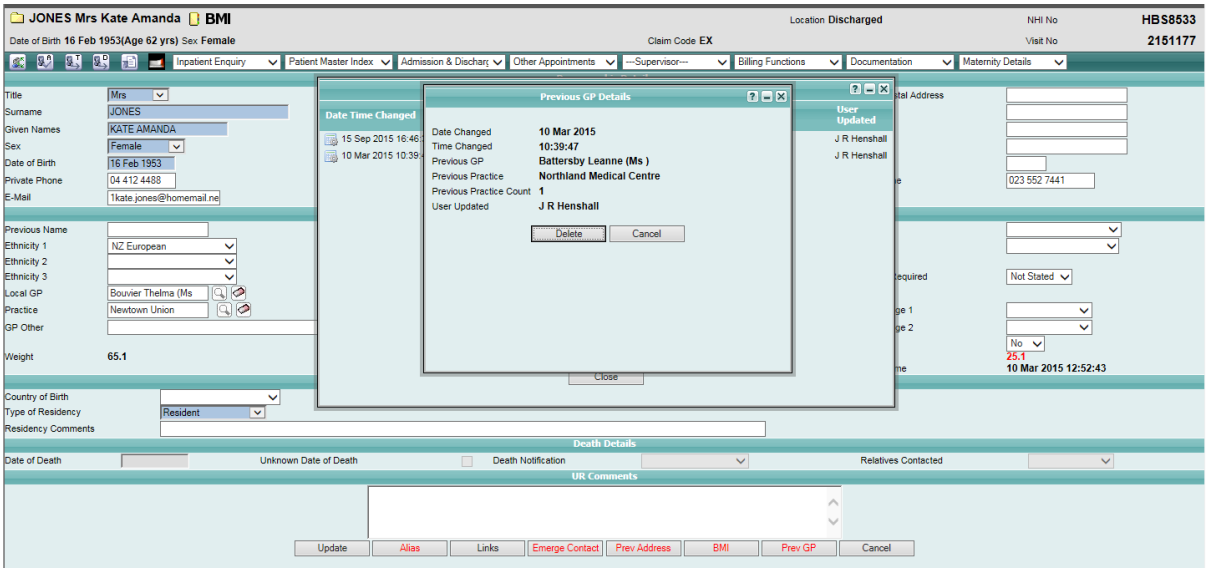
Click the icon beside a Previous GP record to view the details.



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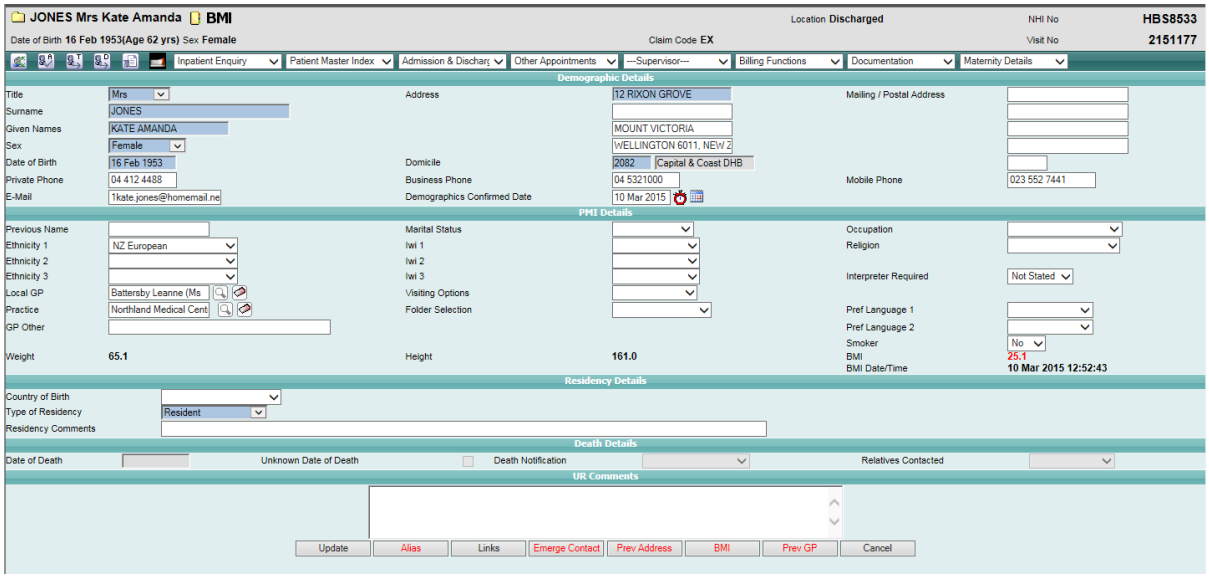
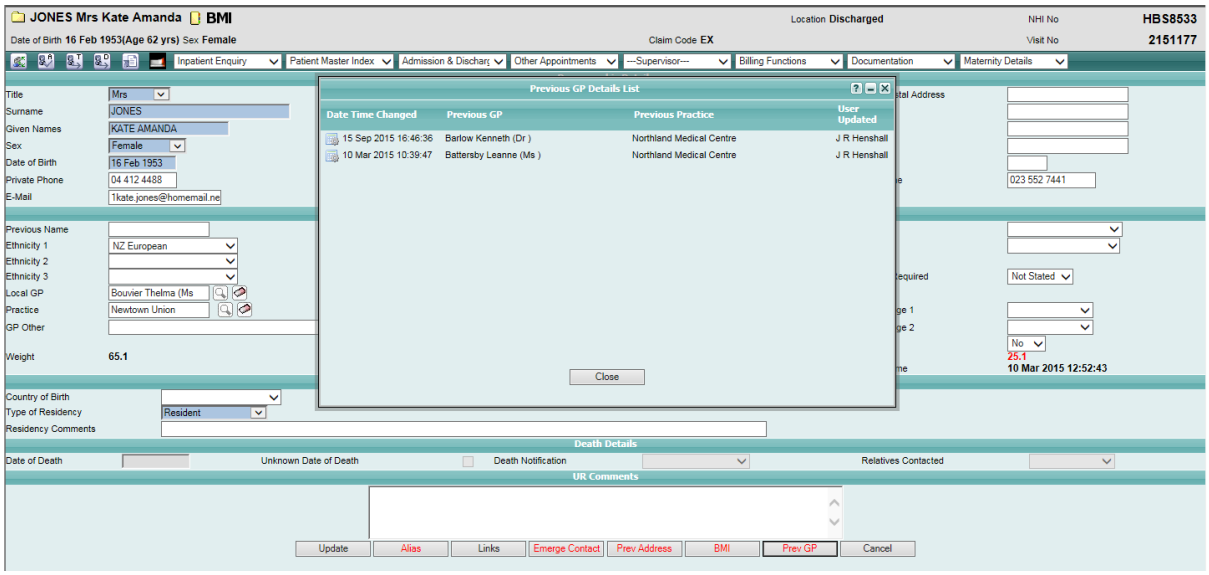
3.6.2 Deleting a Previous GP and Practice

1. Locate the required patient.

2. Select **Change Patient Details** from the appropriate patient level drop down menu.



3. Click the **Prev GP** button.



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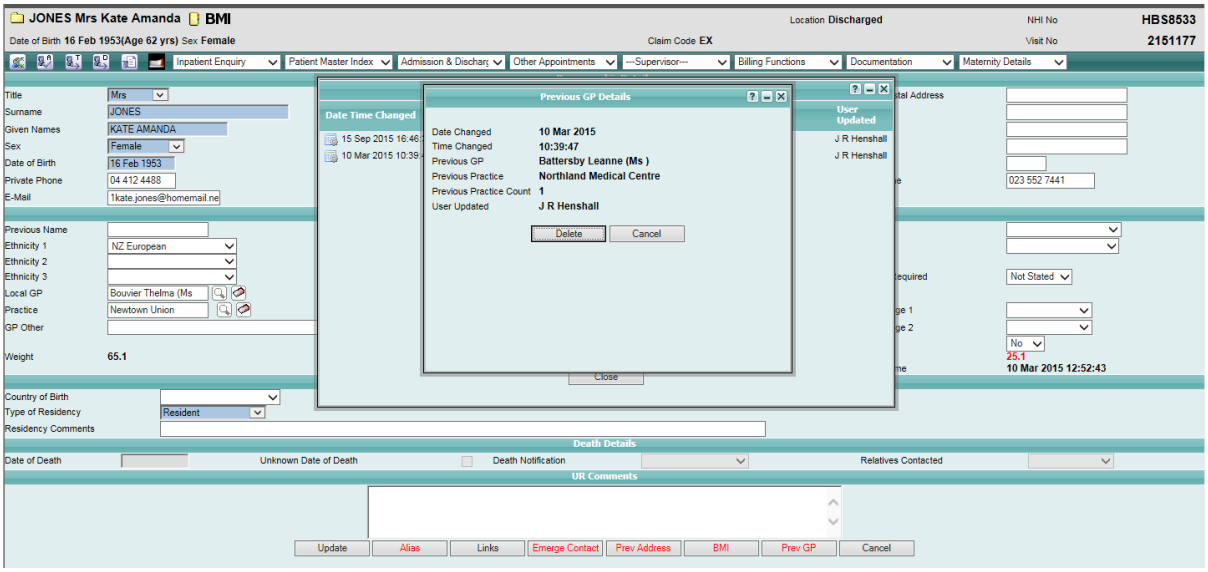
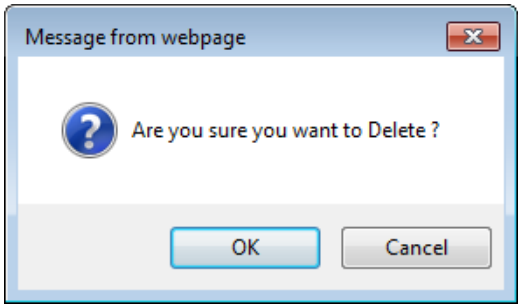
4. Click the icon beside a Previous GP record.



5. Click **Delete**.

The following confirmation message will display.



6. Click **OK** to delete the Previous GP record.

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3.7 Temporary Numbers

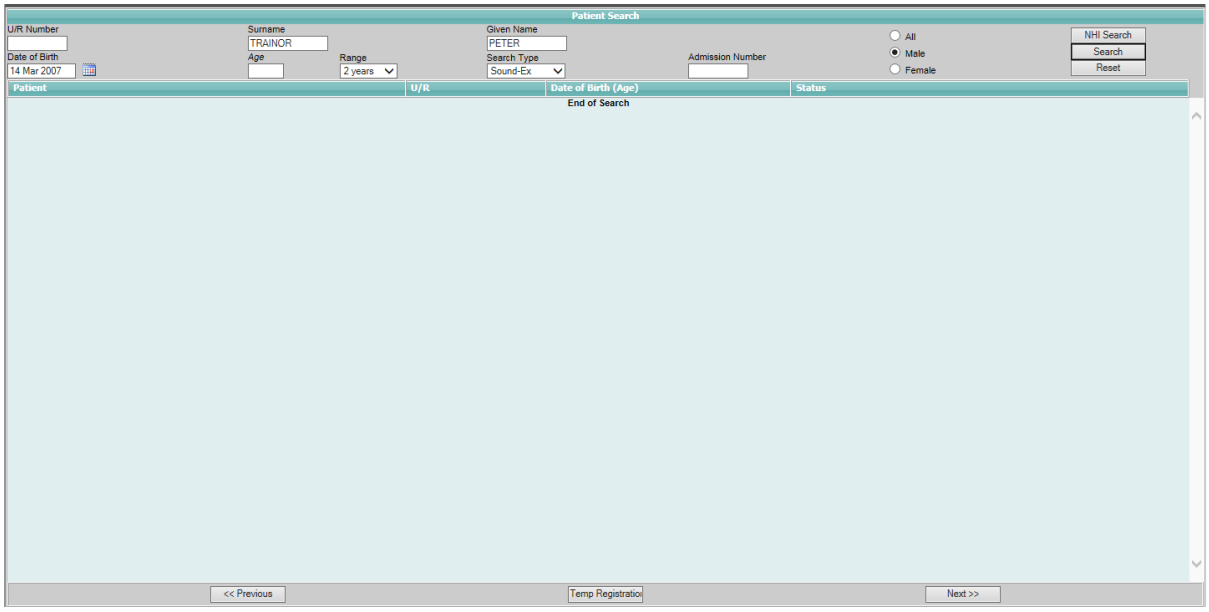
If the NHI is unavailable for any reason and a new registration is required, a Temporary Number will be allocated to the patient.

The Temporary number takes the form of T-99999.

Alternativelty, a temporary number can be manually created after doing a Patient Search and the patient not being found.

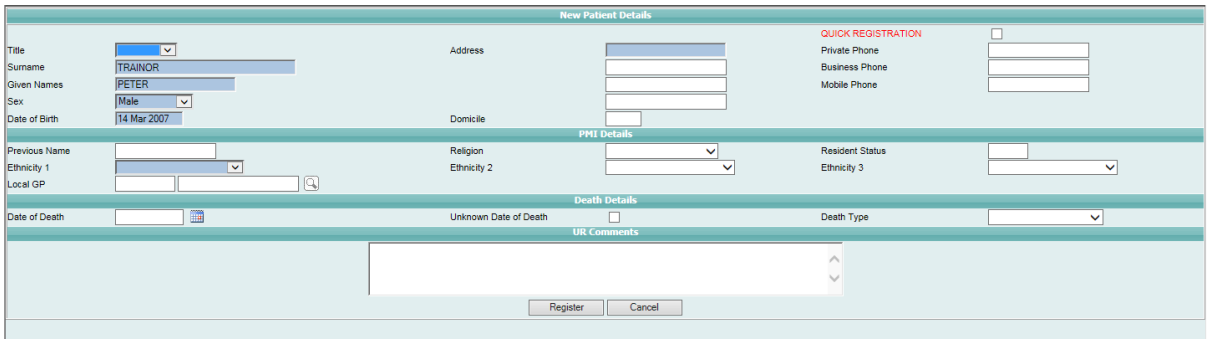
3.7.1 Adding a Temporary Number

1. Perform a Patient Search.



2. Click **Temp Registration**.

The New Patient Details template will display without the NHI number field.



3. Complete the fields.

4. Click **Register**.

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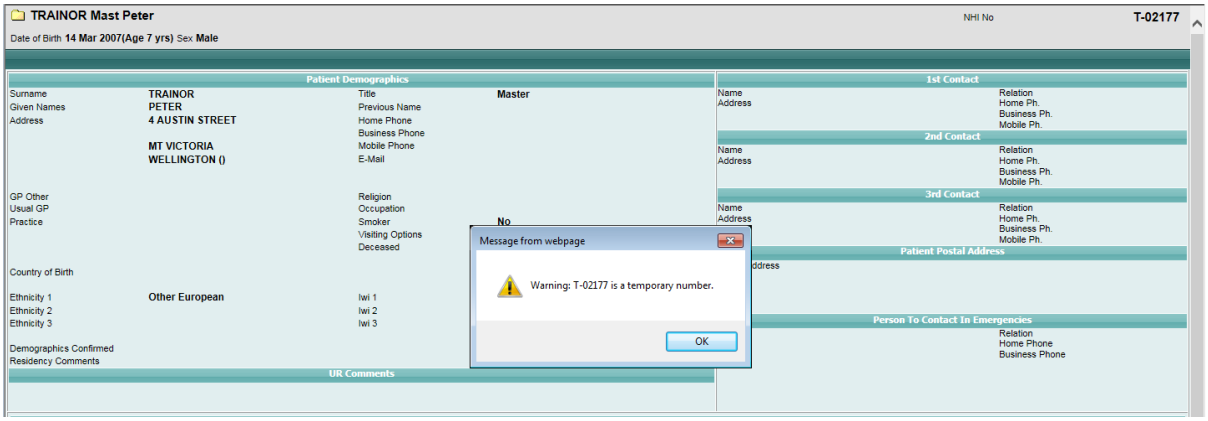
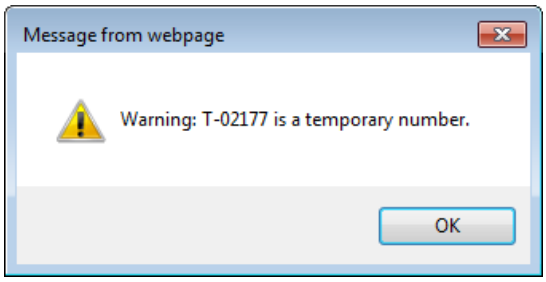
The Patient Demographic template will display in a read-only format with the automatically allocated temporary number at the top of the patient header.



3.7.2 Accessing a Temporary Number

Every time a patient who has a Temporary Number is accessed a warning is displayed.



1. Click **OK** to continue to access the patient.

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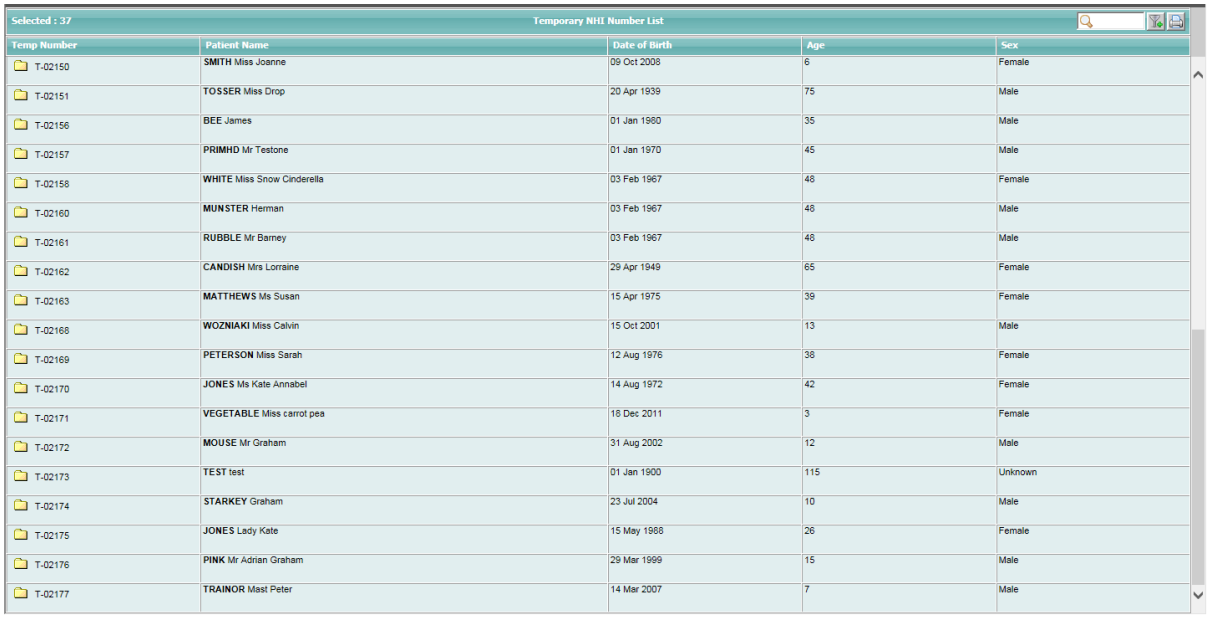
3.7.3 Allocating an NHI Number to a Temporary Number

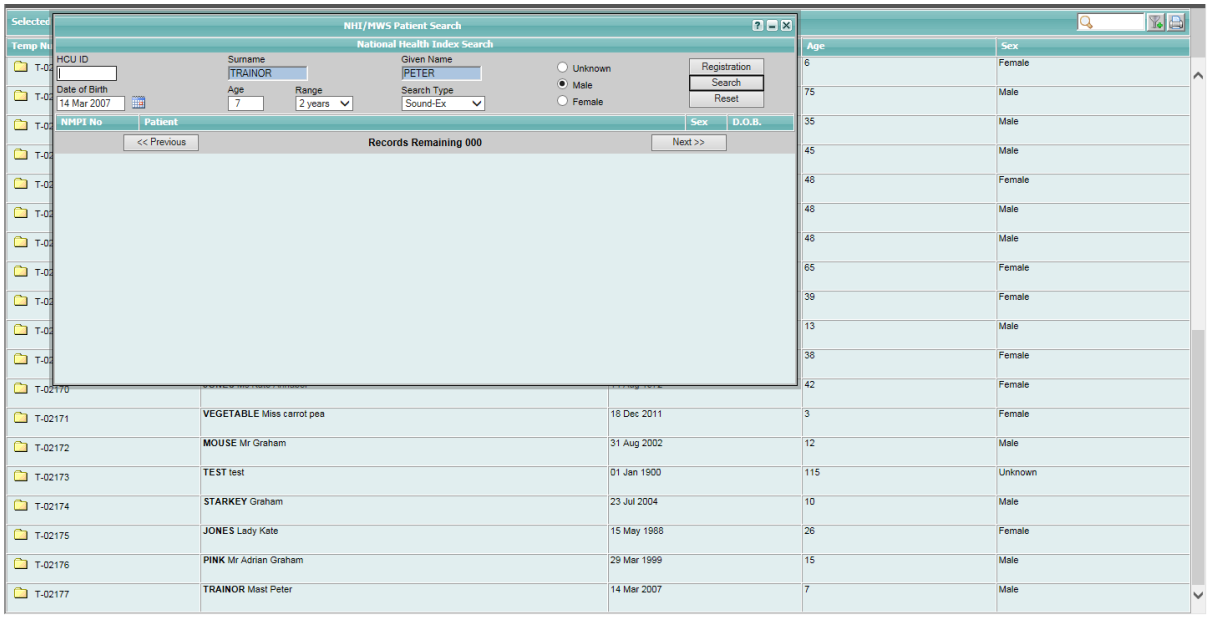
1. Select the **Temporary NHI List** from the appropriate hospital level drop down menu.

A list of all Temporary Numbers in the system is displayed.



2. Select the **Temporary NHI** that is to be assigned an NHI Number.

3. A **NHI Search** screen displays with the patient details from the Temporary Number defaulted into the Search criteria.



4. Check search criteria are complete. Click **Search**.

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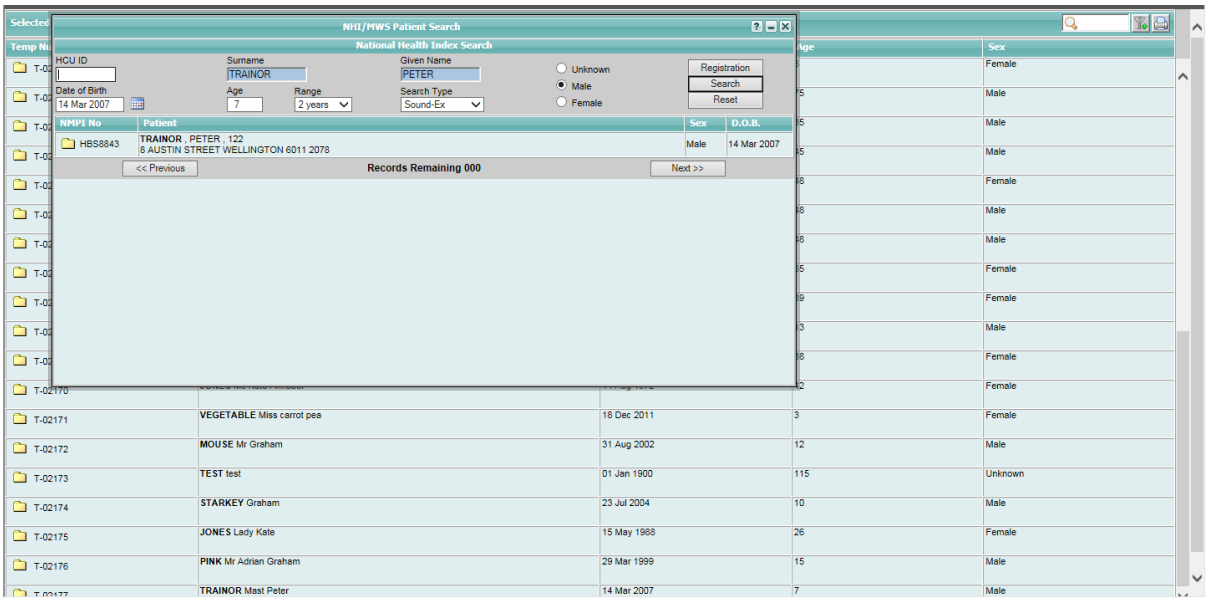
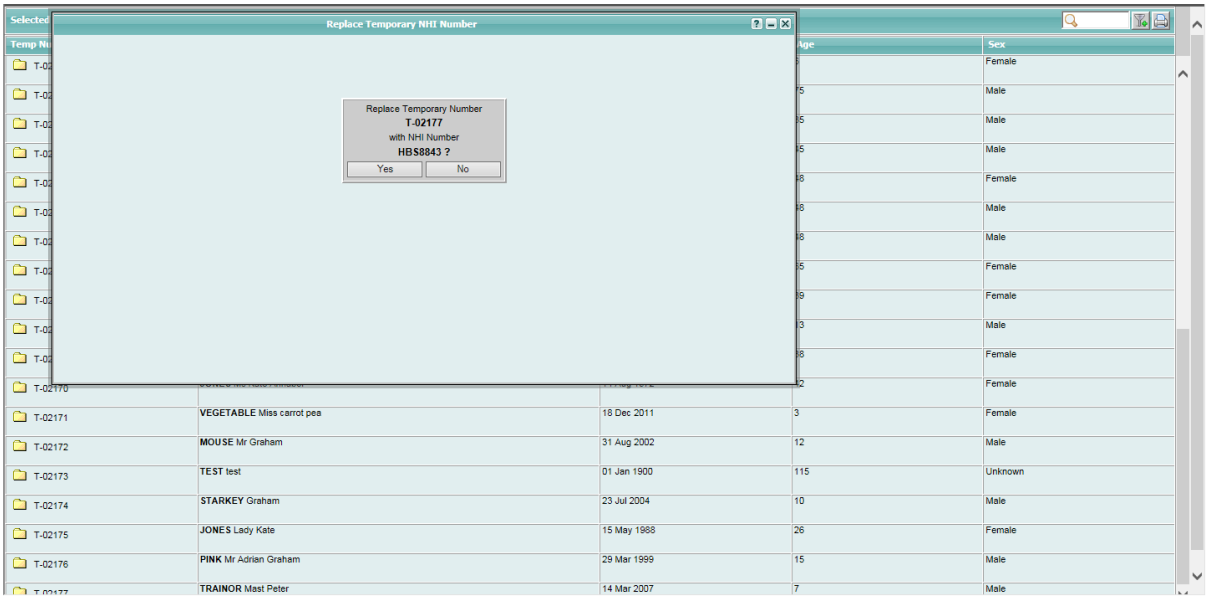
If the NHI Number required is displayed **select** the patient and register the patient on the local system.

If the NHI Number required is not displayed click **Registration** and register the patient on the NHI.



5. When a NHI Number is selected a message advising the Temporary Number will be replaces with the NHI Number is displayed.



6. Click **Yes**.

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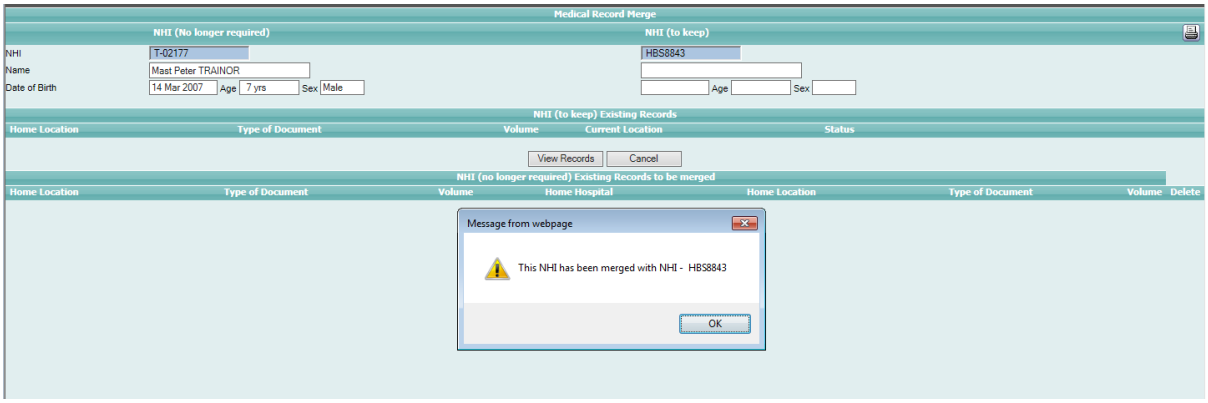
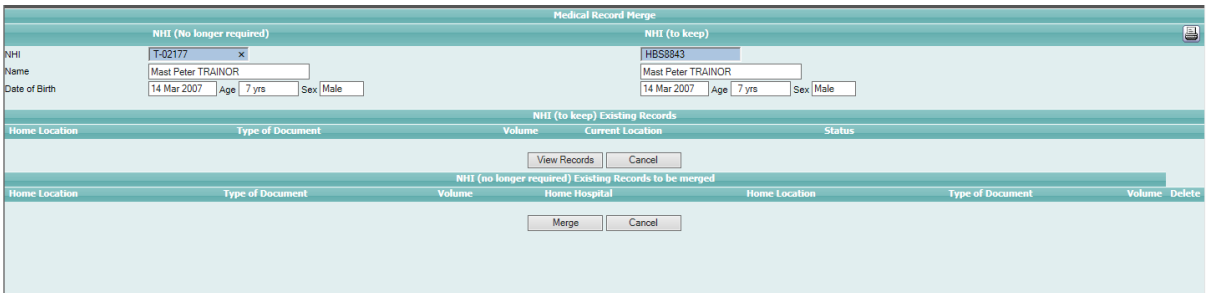
A message advising the number has been merged is displayed.



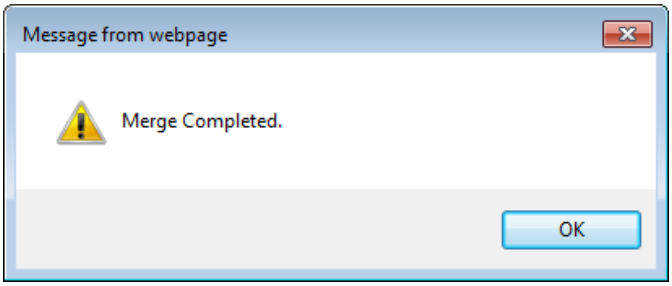
7. Click **OK**.

The Medical Record Merge screen displays.



8. Click **Merge**.

A message advising **Merge Completed** is displayed.



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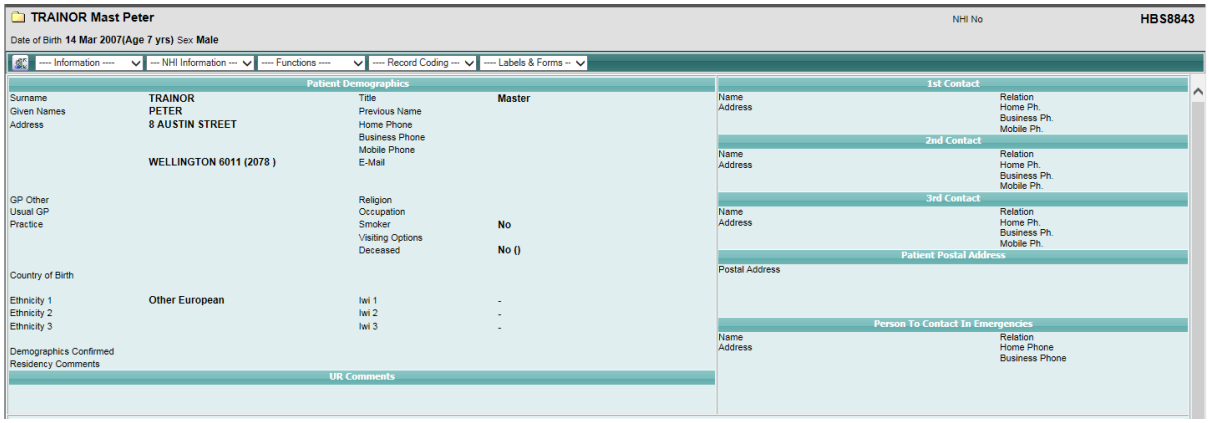
The patient demographics displays with the NHI Number in the patient header.



3.7.4 Viewing Merged Numbers

1. Locate the required patient.

2. Select **View Merges** from the appropriate patient level drop down menu.

A list of **Merged Records** for the patient is displayed. This includes merges to Temporary Numbers.

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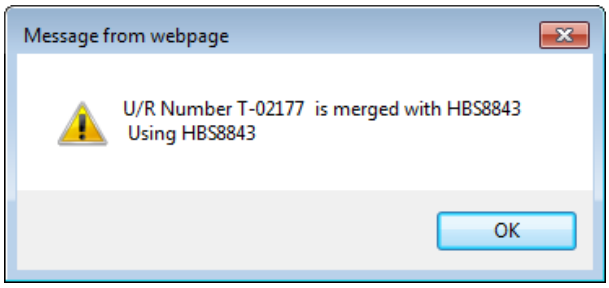
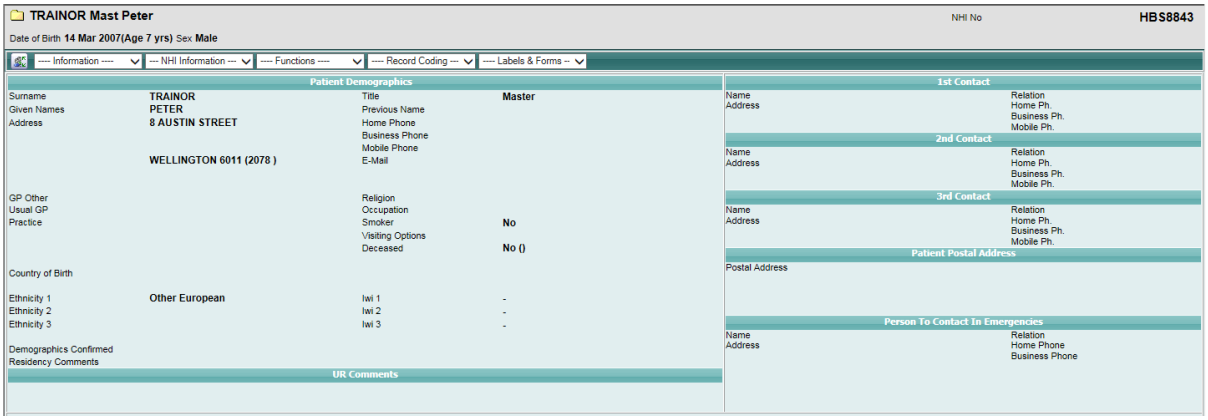
3.7.5 Accessing a patient on an Invalid Merged Number

1. If a **Patient Search** using the U/R Number Search is done and a merged NHI or merged Temporary Number is entered a message advising the number has been merged is displayed and advises the new NHI Number.



2. Click **OK.**

The valid NHI Number is then displayed.



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4 Patient Alerts / Medical Warnings

There are 2 Patient Alert systems available in the webPAS system. Patient Alerts which are a coded system specific to the Local system, and the Medical Warnings on the NHI, which is specific to New Zealand.

- Medical Warnings are held at the NHI and are available to all applications that connect to the NHI/MWS system at the Ministry of Health.

Note: Remember that users will only be able to view and add Alerts to which they have access via the Alert Levels within their Security Id account.

Alerts are used to flag potential dangers to a patient, such as a food allergy.

The patient banner will display an alert icon indicating presence of one or more alerts. Alerts include the following features:

- Alerts are native to webPAS and are held on the local database only.
- Alerts are rich with up to 9 sub-types of information.
- Alerts are protected by security levels, so that only authorised personnel can view or modify the information.

Alerts are useful for maintaining sensitive information locally, such as details of drug abuse or infectious diseases, and for providing a greater level of detail.

When alerts are created, it is important to consider whether it is appropriate for the information to be shared by all users.

The alert icon is also a link the patient Alerts screen.

The webPAS enables users to manage alerts by:

- Adding Alerts
- Viewing Alerts
- Updating Alerts
- Linking documents to an Alert
- Deleting Alerts

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The table below details the fields that may be seen on Alert screens in webPAS and how each should be used.

Field	Type of Alert	Mandatory	Validation
Alert	All	Yes	The coded field for the type of alert being entered. Example: For Allergic Alert, Disease Alert, Disability Alert.
Date Activated	All	Yes	The date that the alert becomes active.
Next Review Date	All	No	The date on which the alert should be reviewed.
End Date	All	No	The date that the alert ends. If there is a date in this field then the alert is no longer active at this date, therefore the system will deactivate the alert icon from the patient banner and labels.
Infection Status	All	No	Select from the drop down list.
Site	All	No	Enter the site of the infection.
Severity Level	All	No	The severity of the alert, 0: Not severe, 9: Life threatening.
Reaction Comment/lab. No	All	No	Comments relating to the alert.

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The table below details the fields that may be seen on NHI/MWS Medical Warnings screens in webPAS and how each should be used.

Field	Type of Alert	Mandatory	Validation
Severity	All	Yes	Warning will default and is the only option available.
Date of Onset	All	Yes	Enter the date of onset of the Medical Warning.
Warning Description	All	Yes	Enter a free text description of the Medical Warning
Doctor Code	All	No	Enter a Doctor code.
Coding System	All	No	Enter a Coding system from the drop down.
Code	All	No	Enter the corresponding code from the Coding System.

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4.1 Adding an Alert

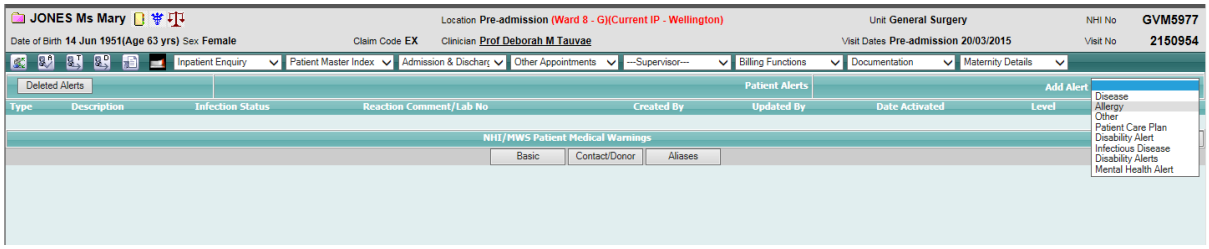
1. Navigate to the required patient.

2. Select **Alerts** from the appropriate patient level drop down menu.

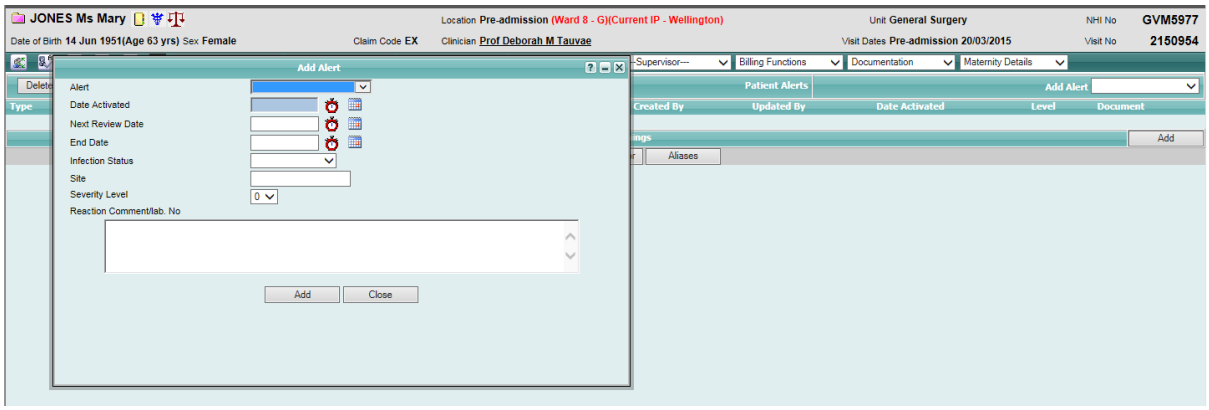
The Patient Alert screen will display.

The screen is made up of 2 sections. The local Patient Alerts appear in the top and below them the Medical Warnings from the NHI/MWS display.

3. Select a value from the **Add Alert** drop down list.



The Add Alert screen will display.



4. Select a value from the **Alert** drop down list.

5. Enter the **Date Activated**.

6. Enter the **Next Review Date**.

7. Select a value from the **Infection Status** drop down list, if relevant to the alert.

8. Record the **Site** of the infection, if relevant to the alert.

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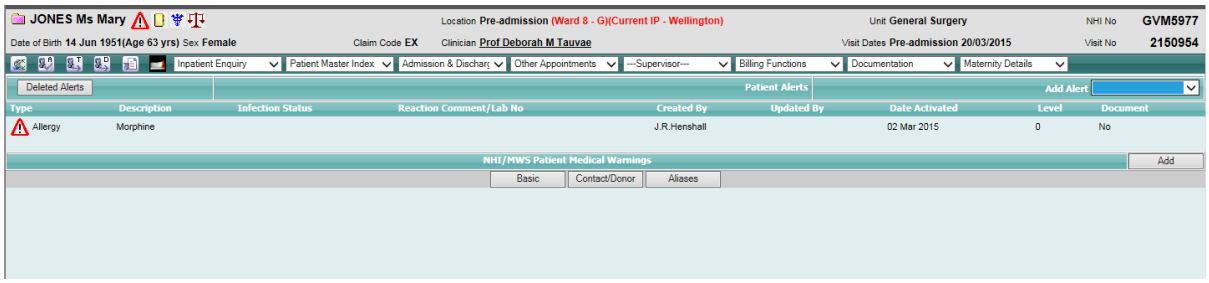
9. Select an appropriate **Severity Level** for the alert.

In the case of an allergy alert, the patient may suffer from an allergic reaction to shellfish with a potential for anaphylactic shock.

10. Specify a **Reaction Comment** and **Lab. No**. if appropriate (free- text field).

11. Click **Add**.

The Patient Alerts screen will display the new record.



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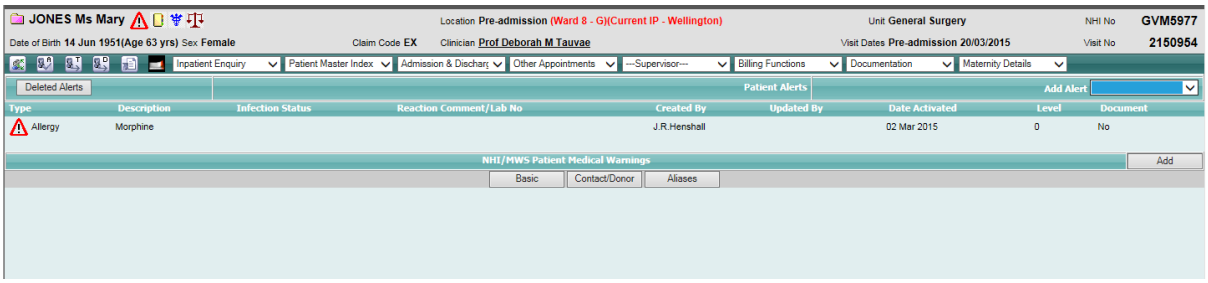
4.1.1 Adding a Duplicate Alert

In some cases, the system may allow users to enter duplicate active alerts. To enable duplicate alerts, indicators must be configured for the Alert Category/Code.

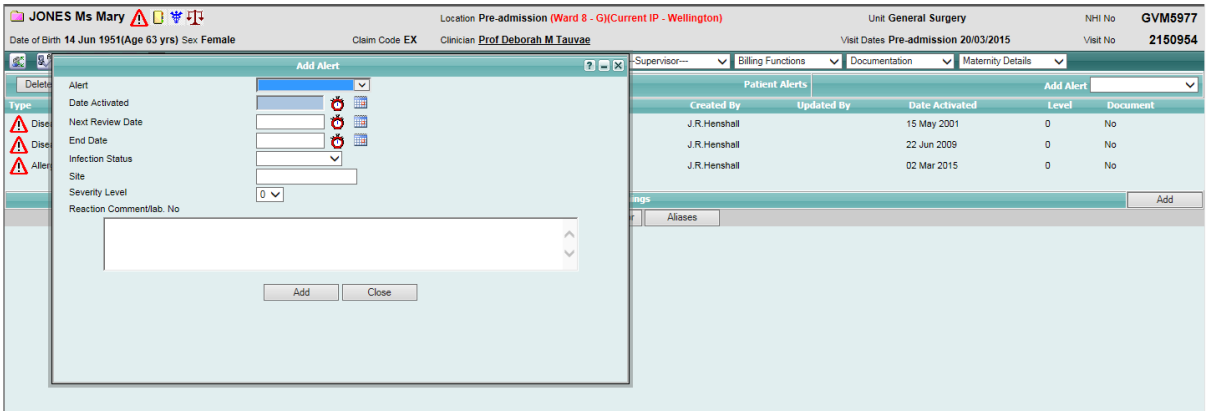
1. Navigate to the required patient.

2. Select **Alerts** from the appropriate patient level drop down menu.

3. The Patient Alert screen will display.



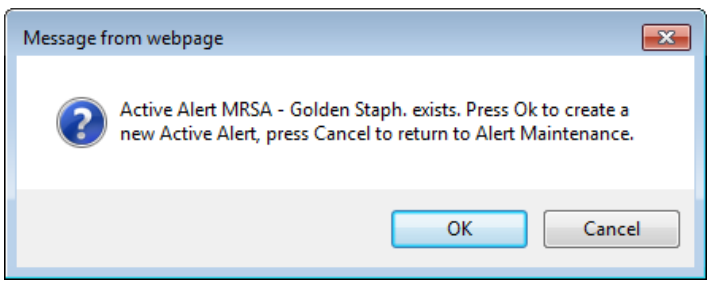
4. Select a value from the **Add Alert** drop down list.



5. Complete the fields.

6. Click **Add**.

The following warning message will display.



7. Click **OK**.

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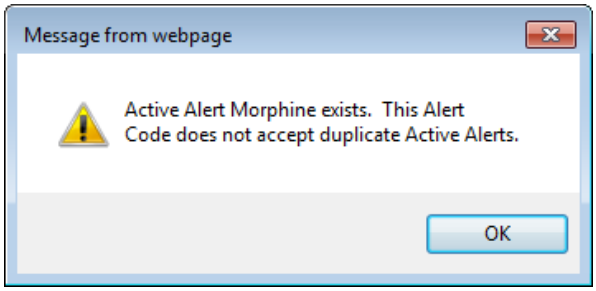
The duplicate alerts will display on the Patient Alert screen.

If an attempt is made to add a non-duplicate alert, the following error message will display.



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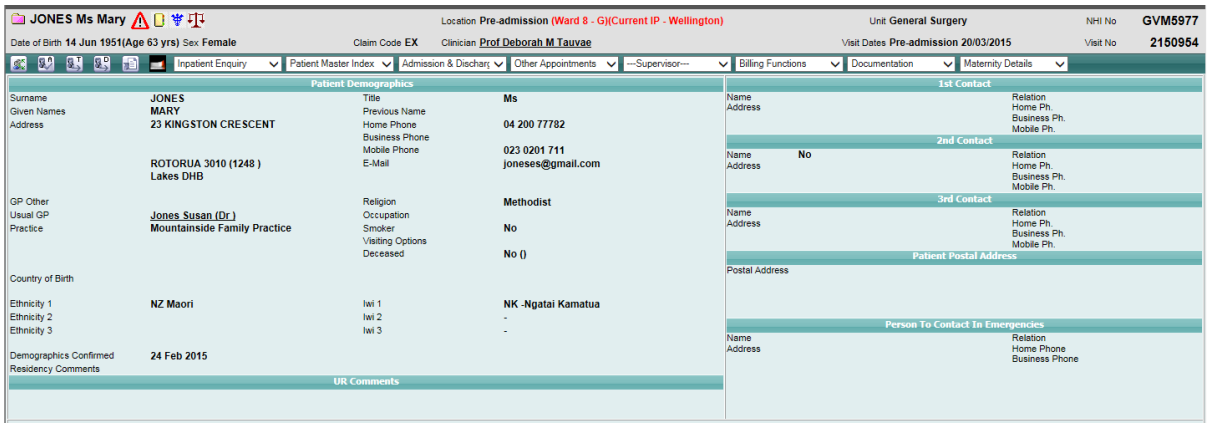
4.2 Viewing Alerts

Patients with one or more alerts will display the alert icon in the patient header.

Access privileges associated with the users Security ID will determine which alerts can be viewed.

1. Navigate to the required patient.



2. Click the alert icon in the patient banner, or

3. Select **Alerts** from the appropriate patient level drop down list.

The Alerts screen will display.

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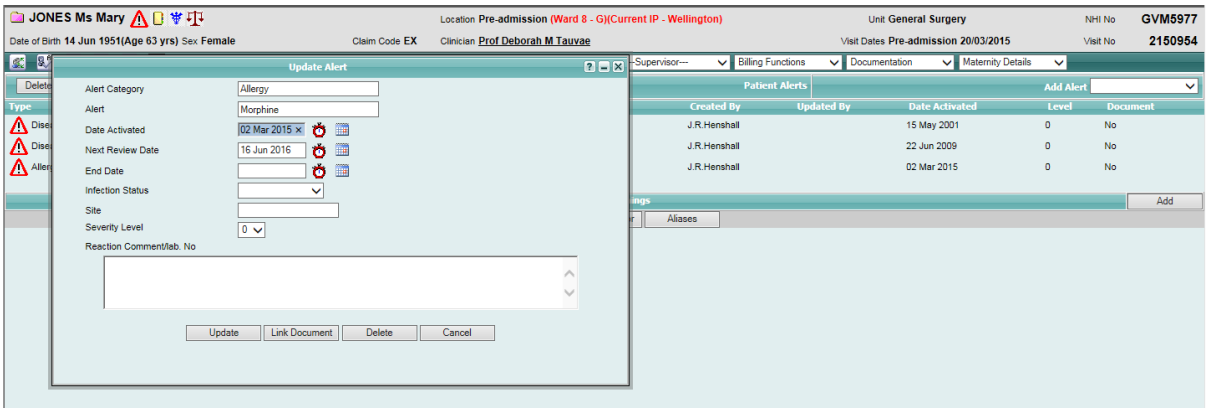
4. Click the alert icon beside the required record.

The Alert is displayed.



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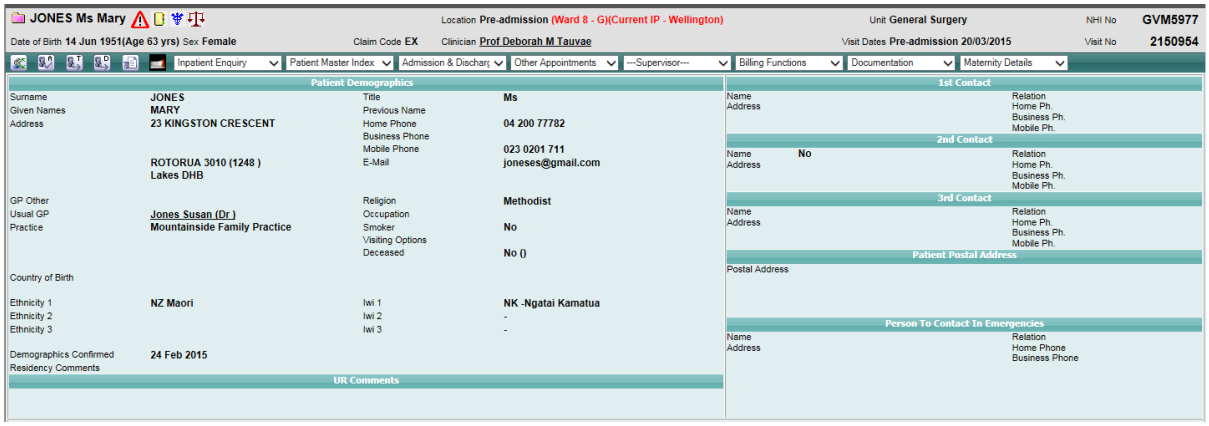
4.3 Updating an Alert

1. Navigate to the required patient.



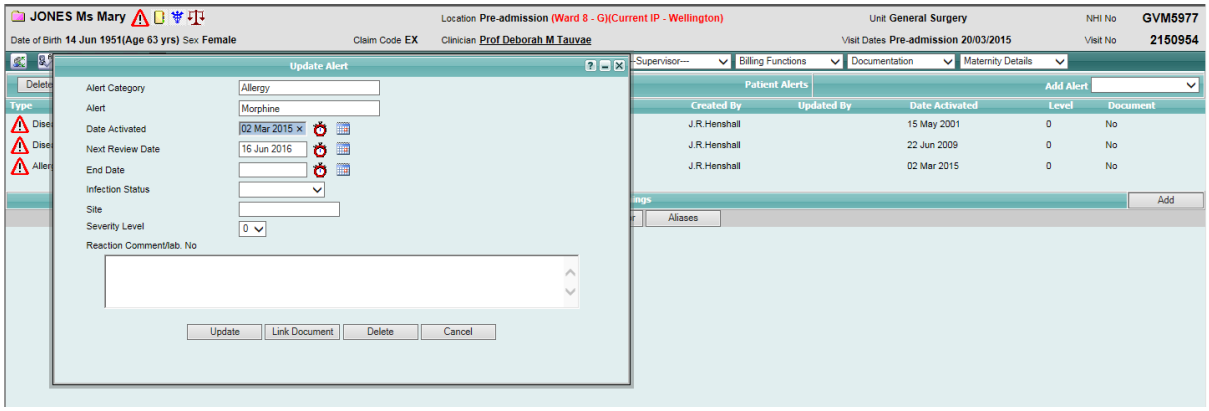
2. Click the alert icon in the patient banner, or

3. Select **Alerts** from the appropriate patient level drop down list.

The Alerts screen will display.

4. Click the alert icon beside the required record.

5. The Alert is displayed.



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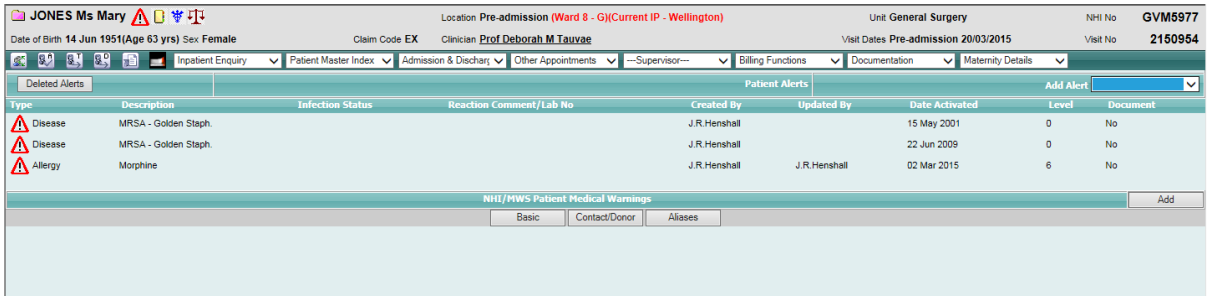
6. Update fields as required.

7. Click **Update**.

The updated details are displayed.



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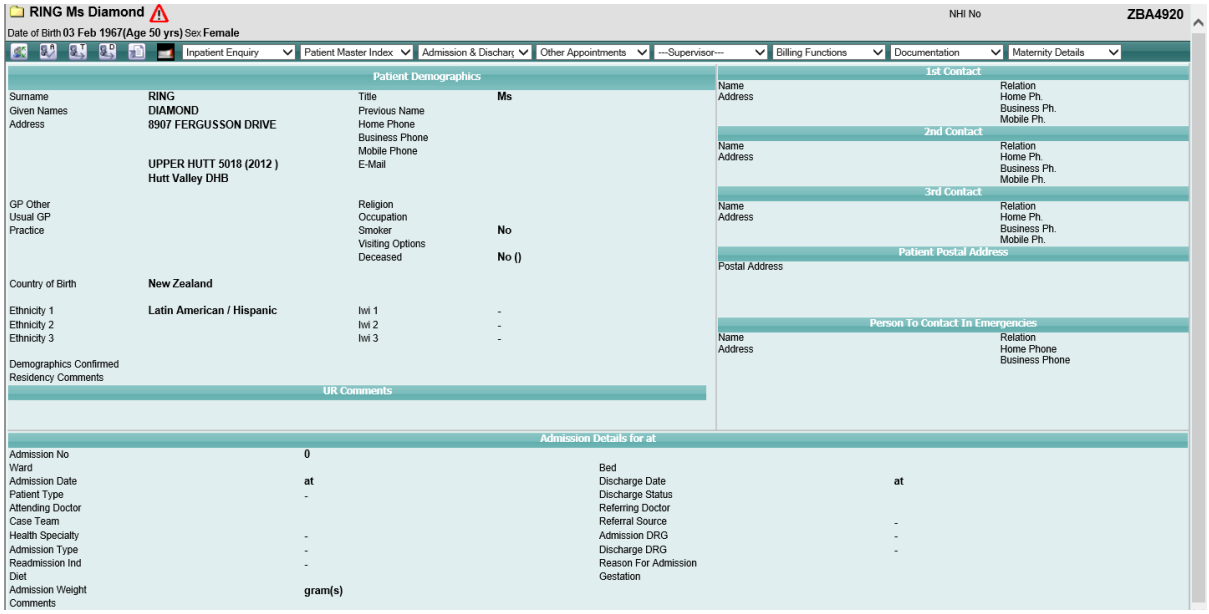
4.4 Viewing Alert History

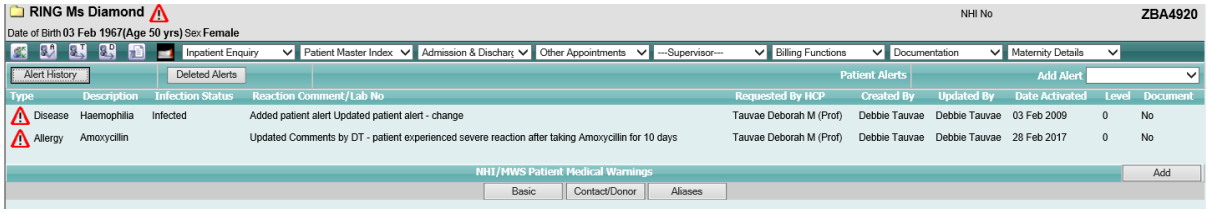
1. Navigate to the required patient.



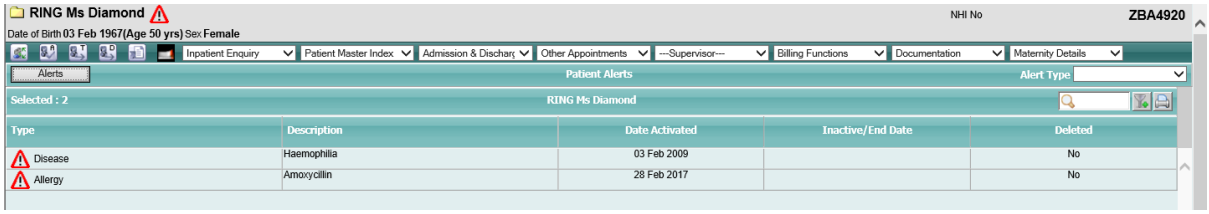
2. Click the alert icon in the patient banner, or

3. Select **Alerts** from the appropriate patient level drop down list.

The Alerts screen will display.



4. Click the alert history icon in the patient banner



Click on alert

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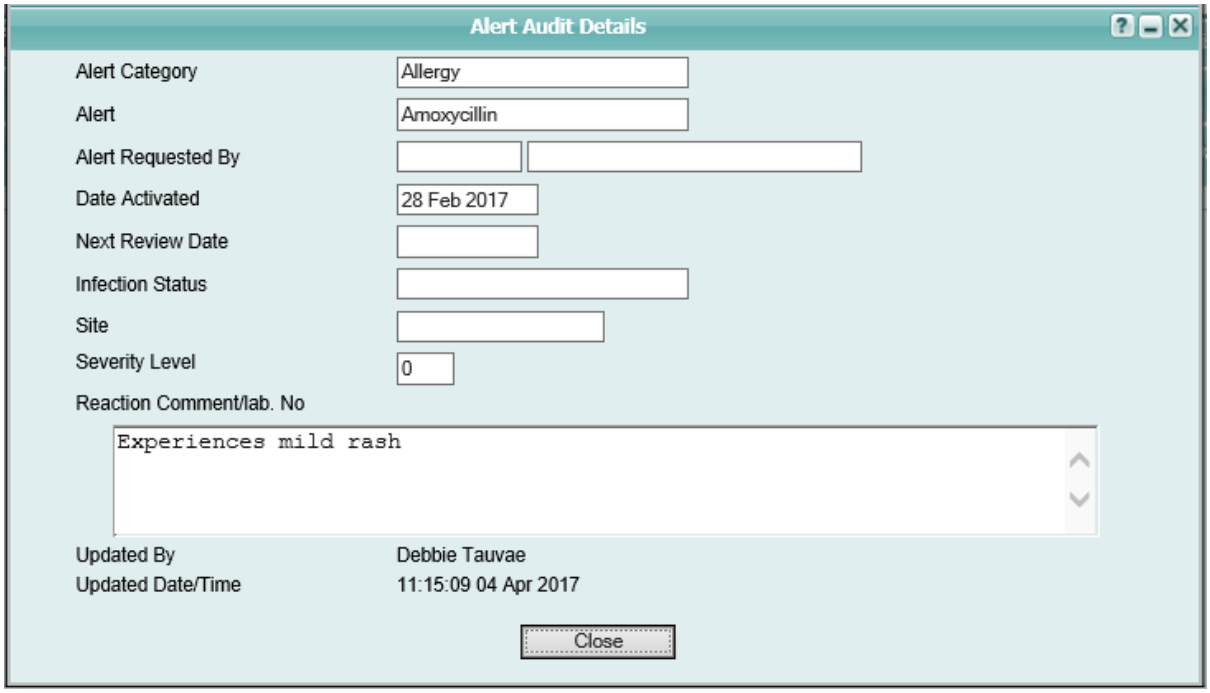
Click the Action Type, ‘Before’ link and the alert will display before it was updated.



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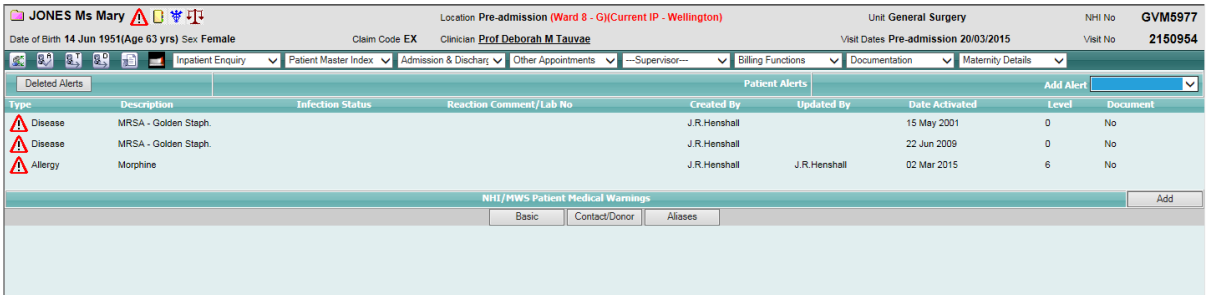
4.5 Medical Warnings on the NHI/MWS

4.5.1 Adding a NHI Medical Warning

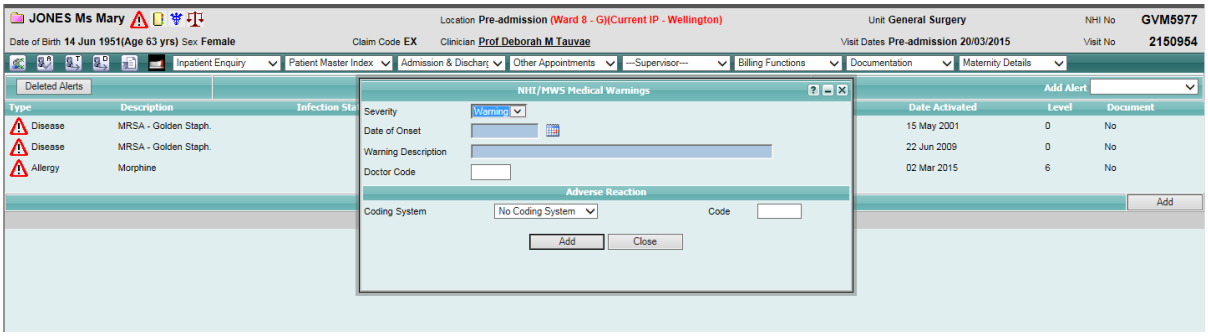
1. Navigate to the required patient.
2. Select **Alerts** from the appropriate patient level drop down menu.

The Patient Alerts screen will display.



3. Select the **Add** button in the NHI/MWS Patient Medical Warnings section.

The Add Medical Warnings screen will display.



4. Complete the fields.
5. Click **Add**.

The NHI Medical Warning will display in the bottom section of the screen.

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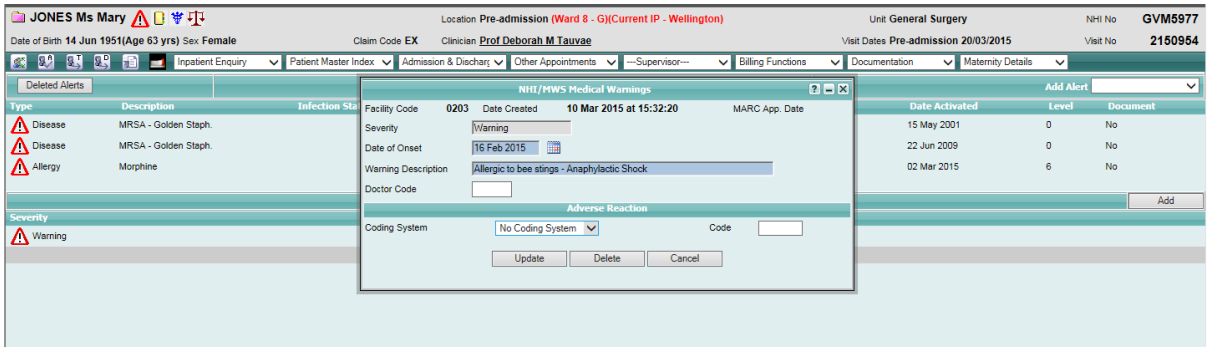
4.5.2 Updating a Medical Warning

1. Navigate to the required patient.
2. Select **Alerts** from the appropriate patient level drop down menu.

The Patient Alerts screen will display.

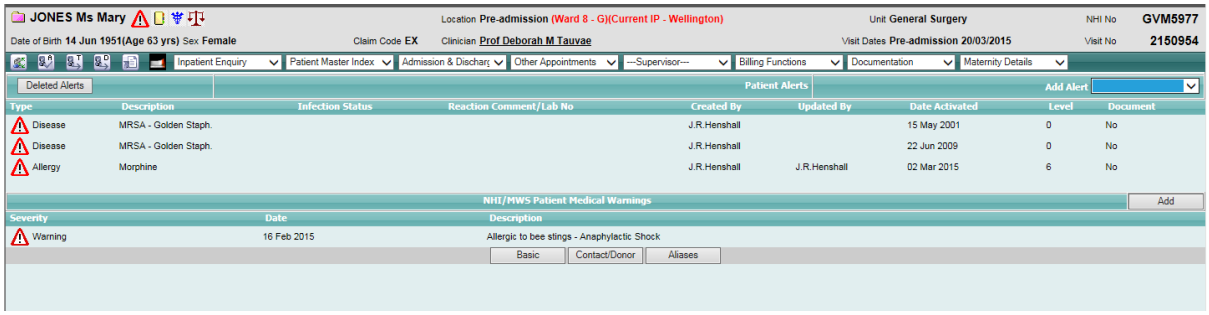
3. Click the alert icon beside the required NHI/MWS record.

The Update Medical Warning screen will display.



4. Update the details as required.
5. Click **Update**.

The updated Medical Warning will display on the Patient Alerts screen.



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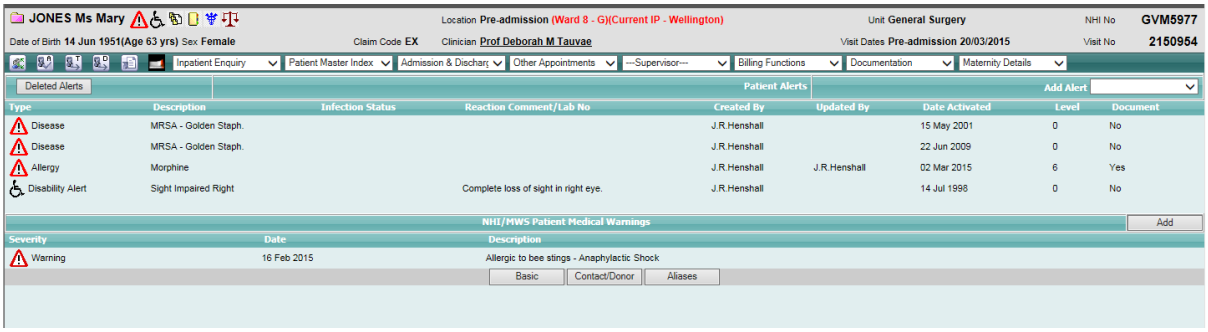
4.5.3 Deleting a Medical Warning

1. Navigate to the required patient.

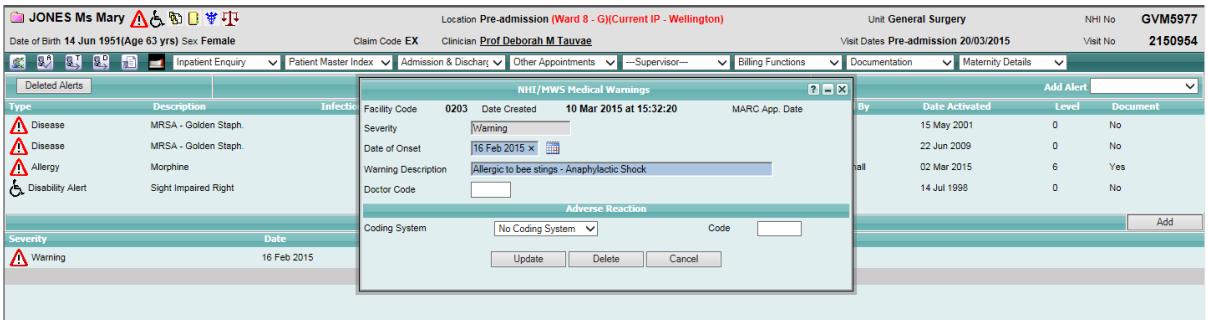
2. Select **Alerts** from the appropriate patient level drop down menu.

The Patient Alerts screen will display.



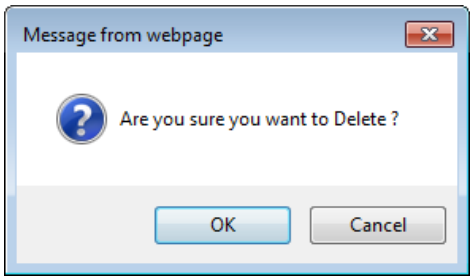
3. Click the alert icon beside the required NHI/MWS record.

The Medical Warning screen will display.



4. Click **Delete**.

A warning will be displaying ensuring you want to Delete the Medical Warning.



5. Click **OK**.

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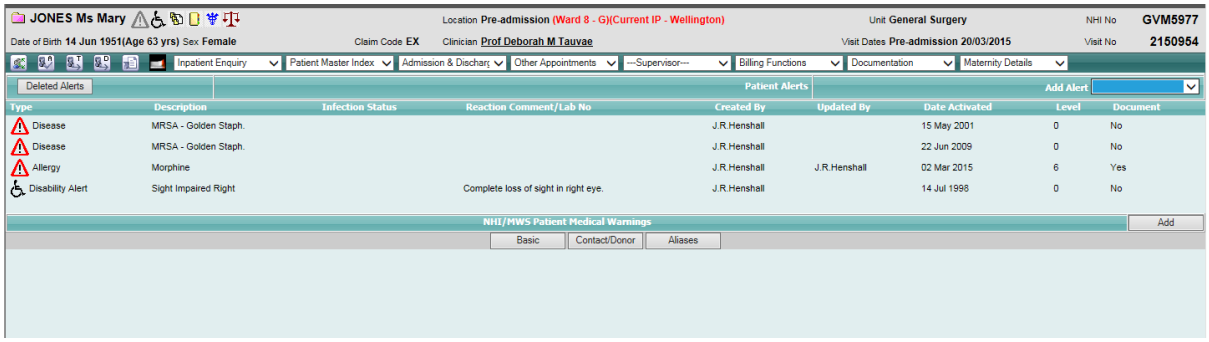
The Medical Warning will be removed from the Patient Alerts screen.



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4.6 Disability Alerts

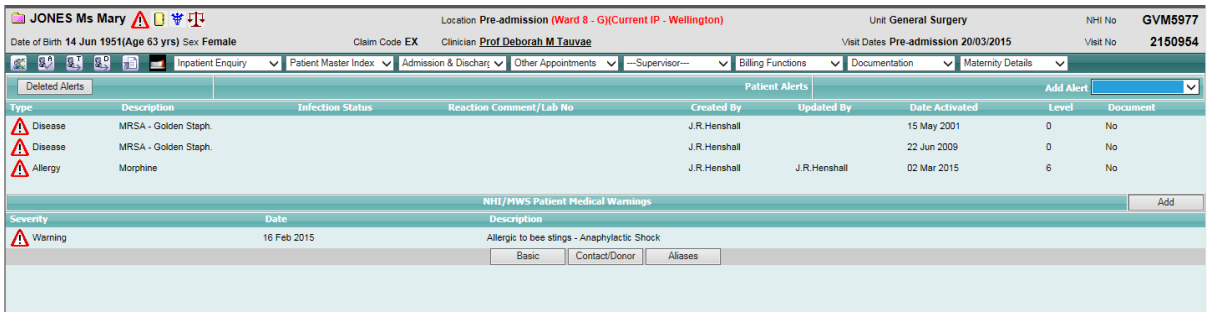
4.6.1 Adding a Disability Alert

webPAS can be configured to record Disability Alerts.

1. Navigate to the required patient.

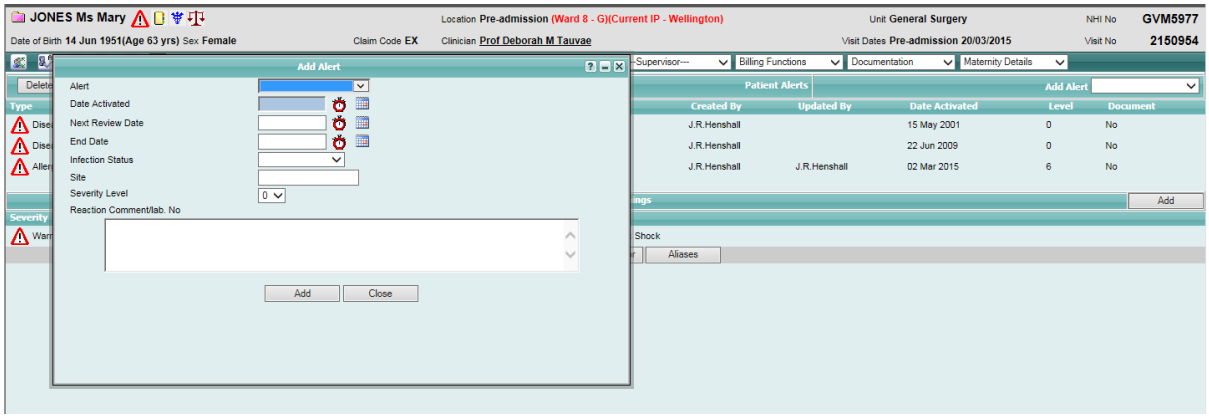
2. Select **Alerts** from the appropriate patient level drop down menu.

The Patient Alert screen will display.



3. Select **Disability Alert** from the Add Alert drop down list.

The Add Alert screen will display.



4. Select a value from the Alert drop down list.

5. Complete the required details.

6. Click **Add**.

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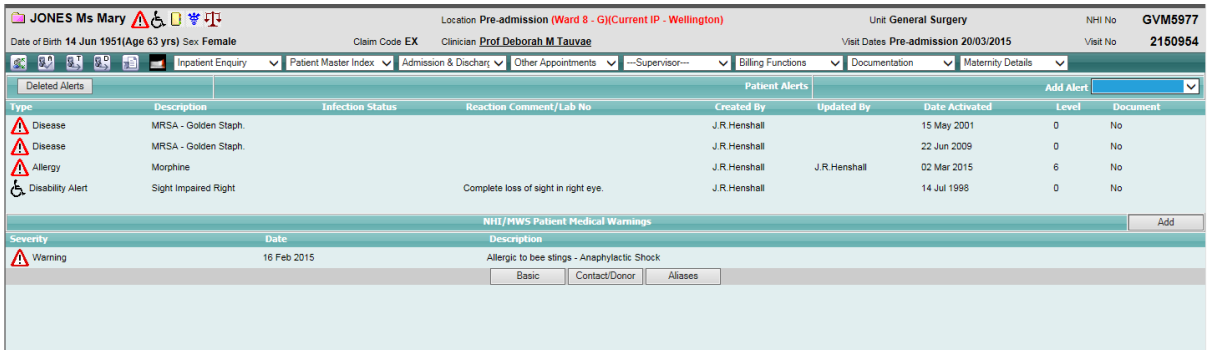
The Patient Alert screen will display.

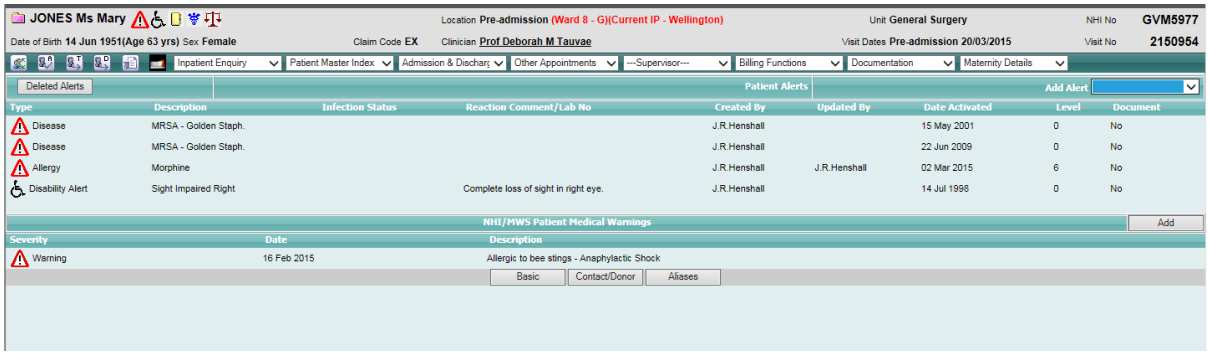


The Disability Alert icon appears in the Patient Alerts list and also in the patient header.

4.6.2 Updating Disability Alerts

1. Navigate to the required patient.
2. Select **Alerts** from the appropriate patient level drop down menu.

The Patient Alert screen will display.



3. Click the alert icon beside the required record.

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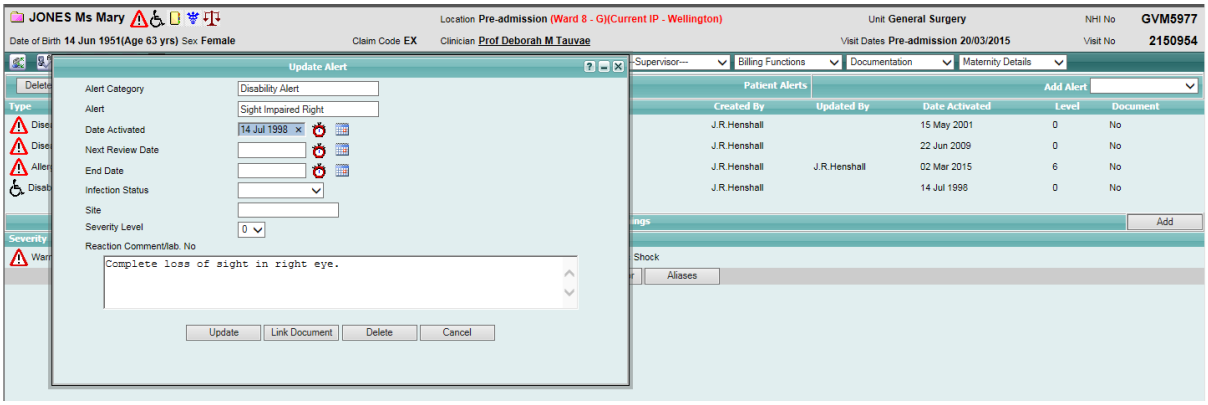
The Update Alert screen will display.



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4.7 Security Alerts

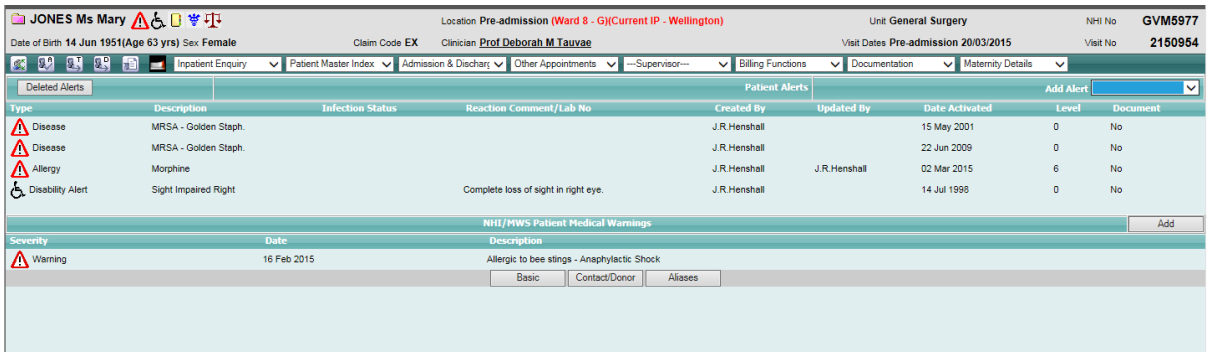
4.7.1 Adding a Security Alert

webPAS can be configured to record Security Alerts. These can be for such things as Self Harm Threat.

1. Navigate to the required patient.

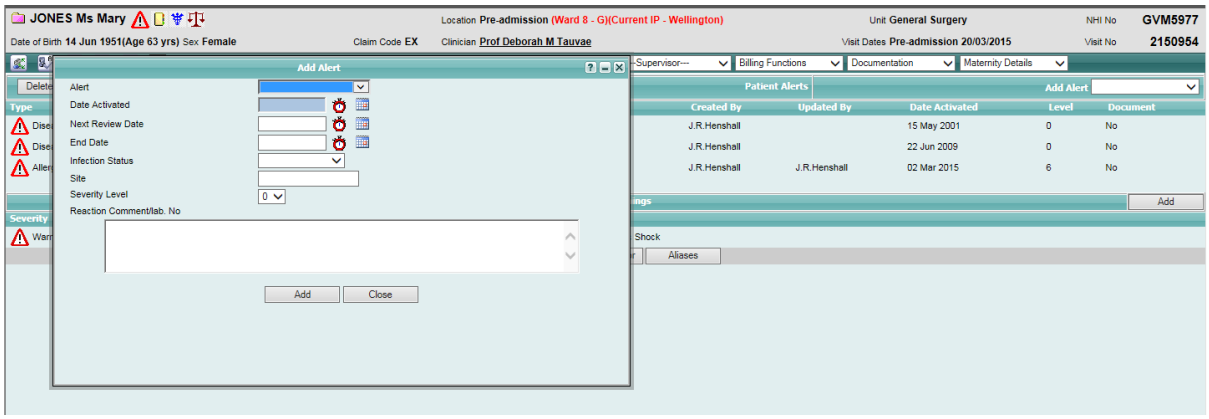
2. Select **Alerts** from the appropriate patient level drop down menu.

The Patient Alert screen will display.



3. Select **Mental Health Alert** from the Add Alert drop down list.

The Add Alert screen will display.



4. Select a value from the Alert drop down list.

5. Complete the required details.

6. Click **Add**.

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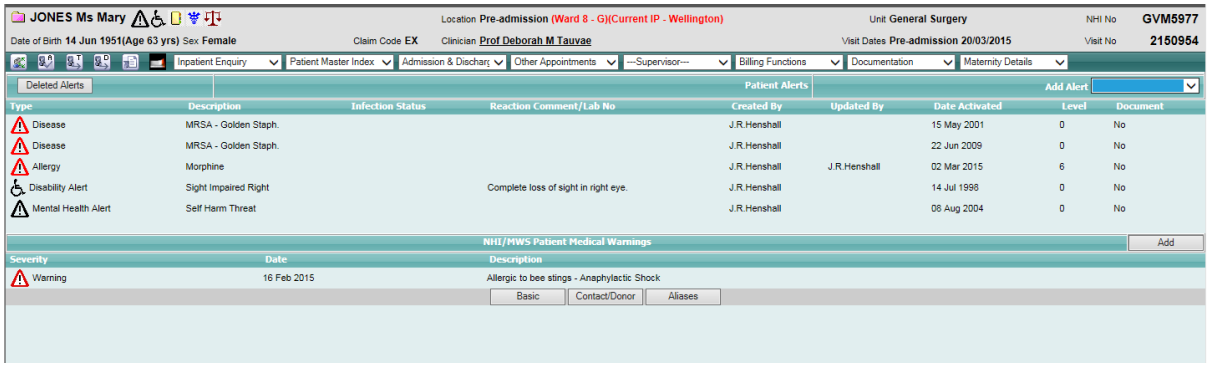
The Patient Alert screen will display.

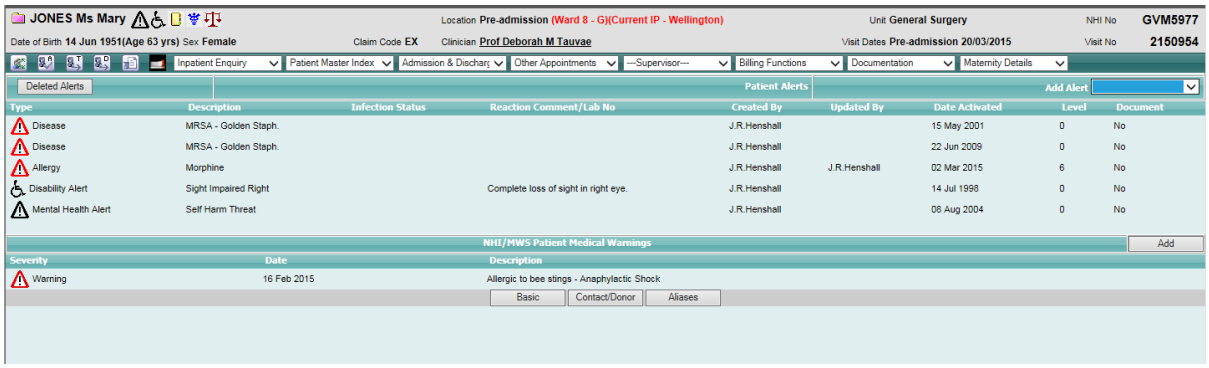


The Security Alert icon appears in the Patient Alerts list and also in the patient header.

4.7.2 Updating Security Alerts

1. Navigate to the required patient.
2. Select **Alerts** from the appropriate patient level drop down menu.

The Patient Alert screen will display.



3. Click the alert icon beside the required record.

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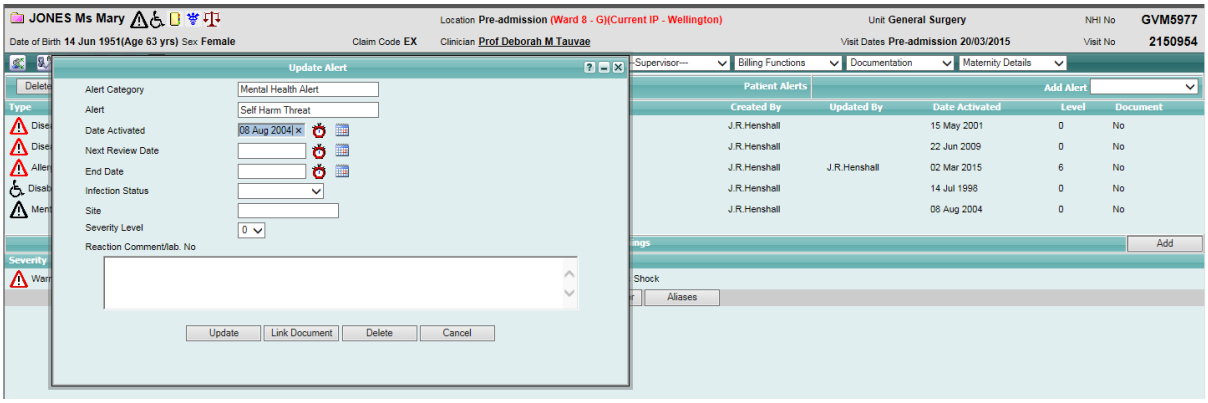
The Update Alert screen will display.



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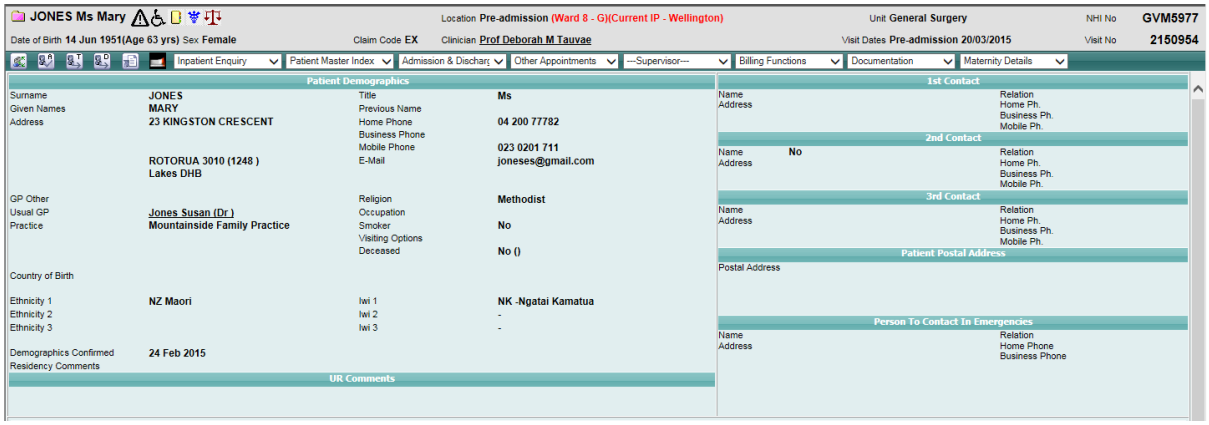
4.8 Linking a Document to an Alert

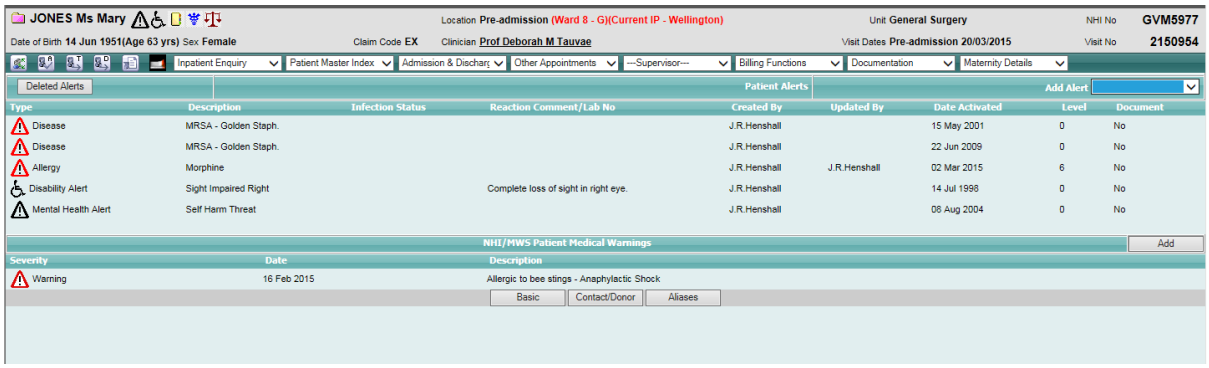
1. Navigate to the required patient.



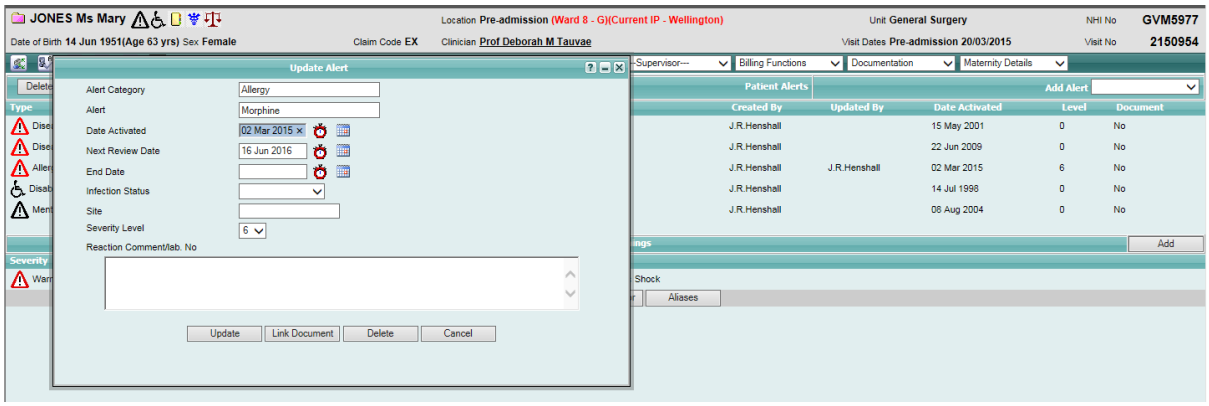
2. Click the alert icon in the patient banner, or

3. Select **Alerts** from the appropriate patient level drop down list.

The Alerts screen will display.



4. Click the alert icon beside the required record.



5. Click **Link Document**.

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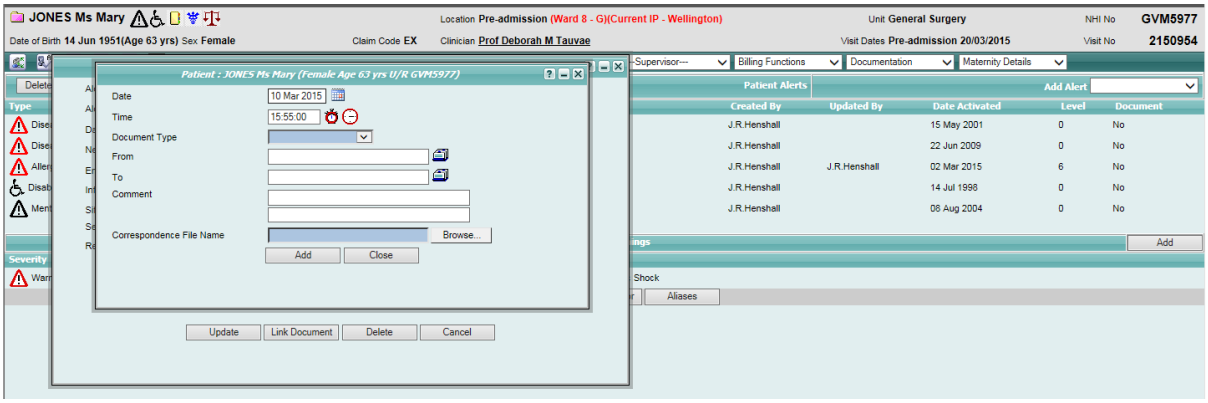
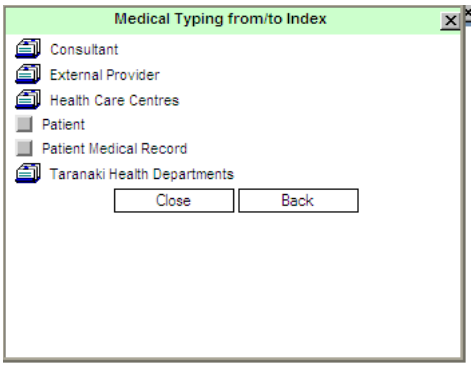
The Add Document screen will display.



6. Select a value from the **Document Type** drop down list.

7. Information can be entered into the **From** and **To** boxes by either typing directly into the box or clicking on the card file icon and selecting from the list.

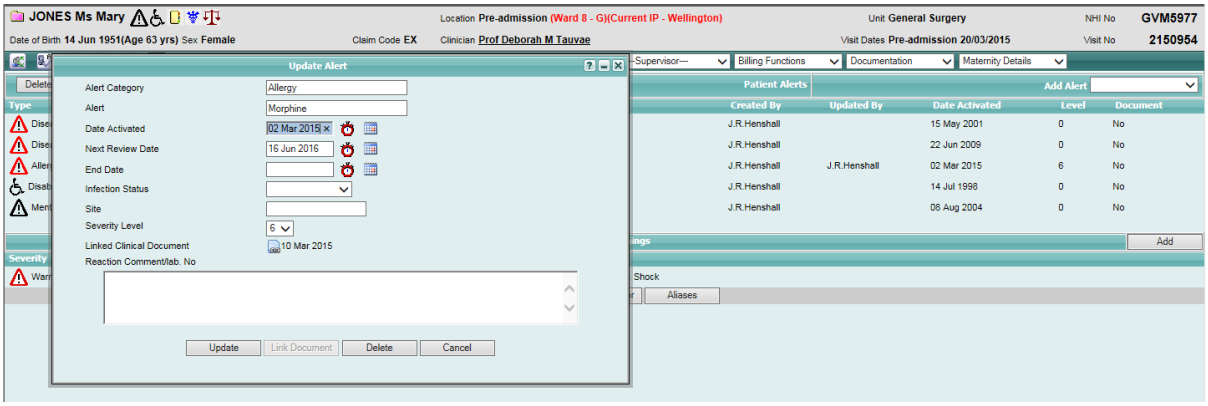


8. Click **Browse** to search for a file.

9. Select a file to link to the alert.

10. Click **Add**.

The Update Alert screen will display showing there is a linked document.



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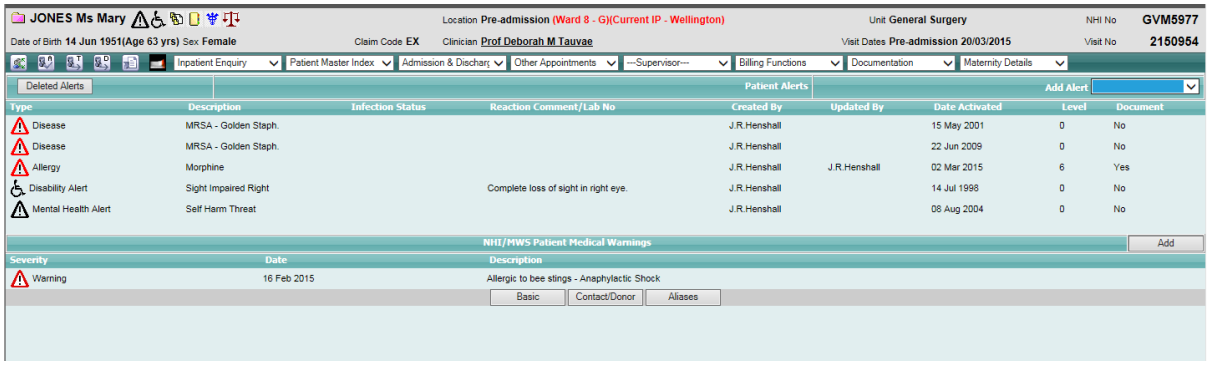
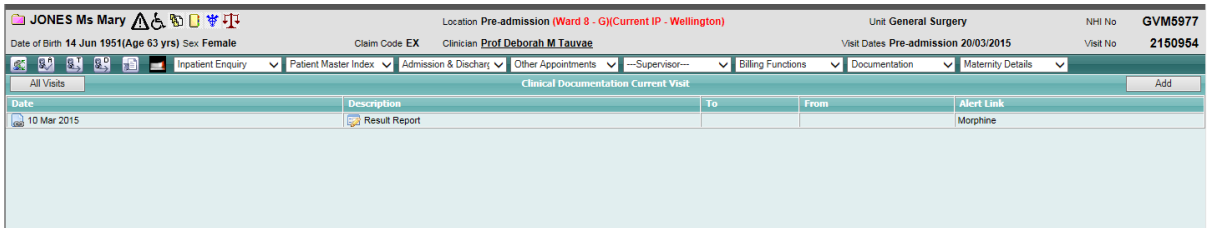
The Clinical Documents icon will display in the patient banner.



11. Click the **Clinical Documents** icon.

The Clinical Documentation screen will display.



Note: Once a document is linked to an Alert, it is also available to view from the Clinical Documents Menu.

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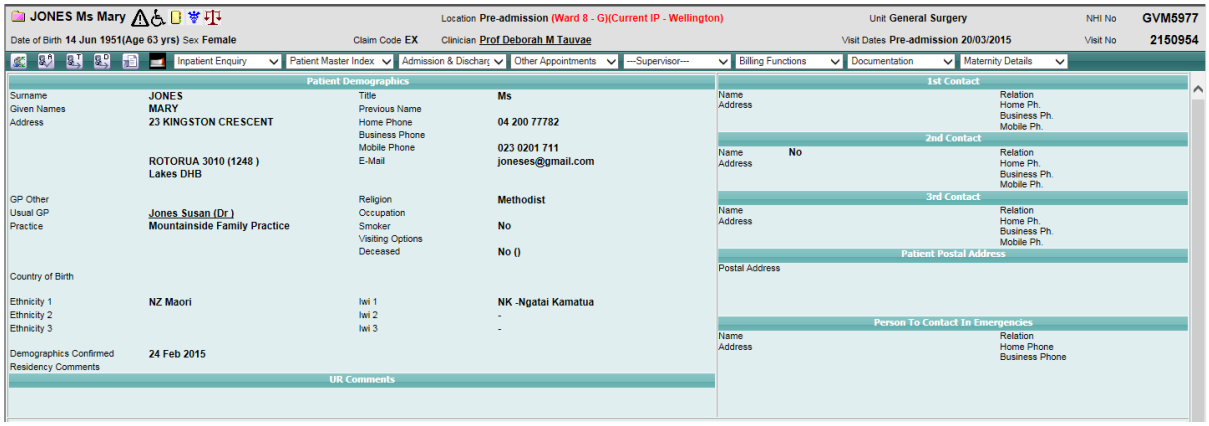
4.9 Deleted Alerts

4.9.1 Deleting an Alert

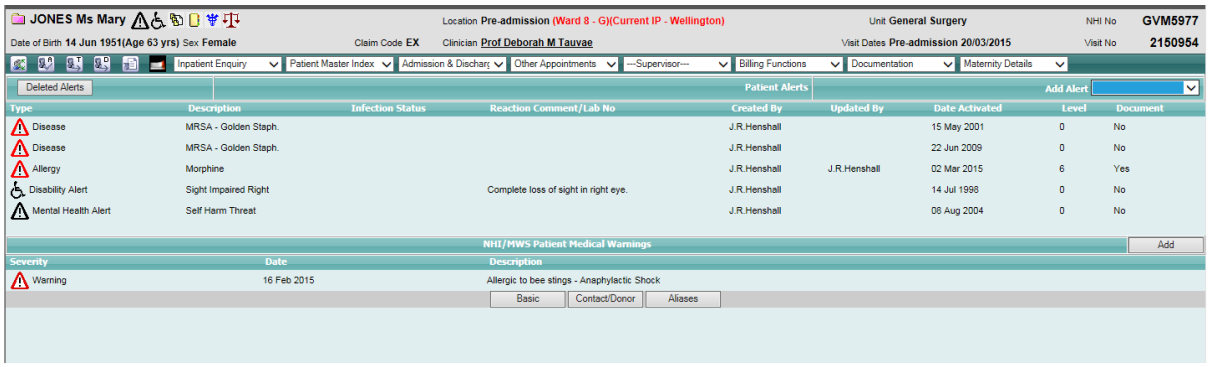
1. Navigate to the required patient.



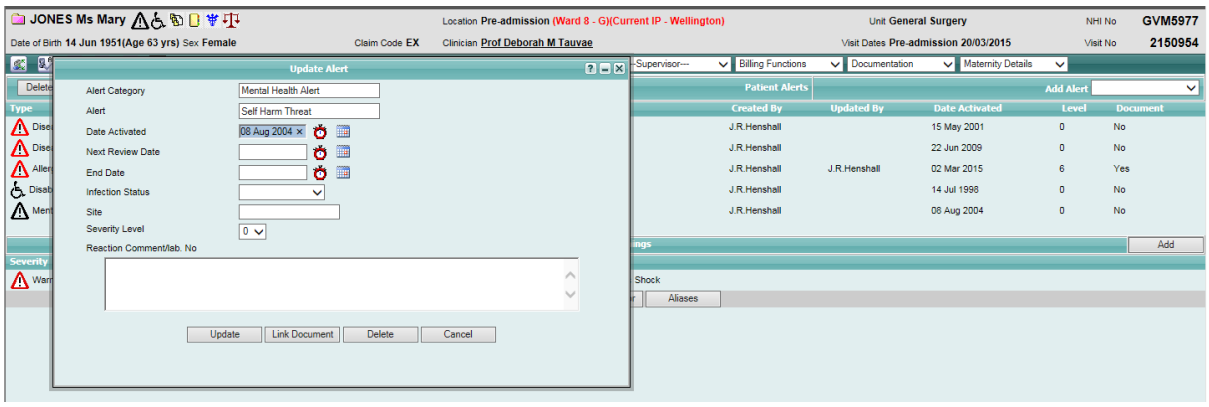
2. Click the alert icon in the patient banner, or

3. Select **Alerts** from the appropriate patient level drop down list.

The Alerts screen will display.



4. Click the alert icon beside the required record.



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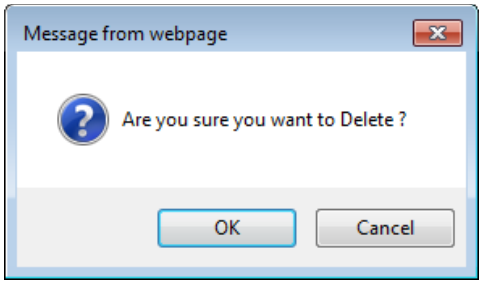
5. Click **Delete**.

The following message will display.



6. Click **OK**.

The alert will be deleted.

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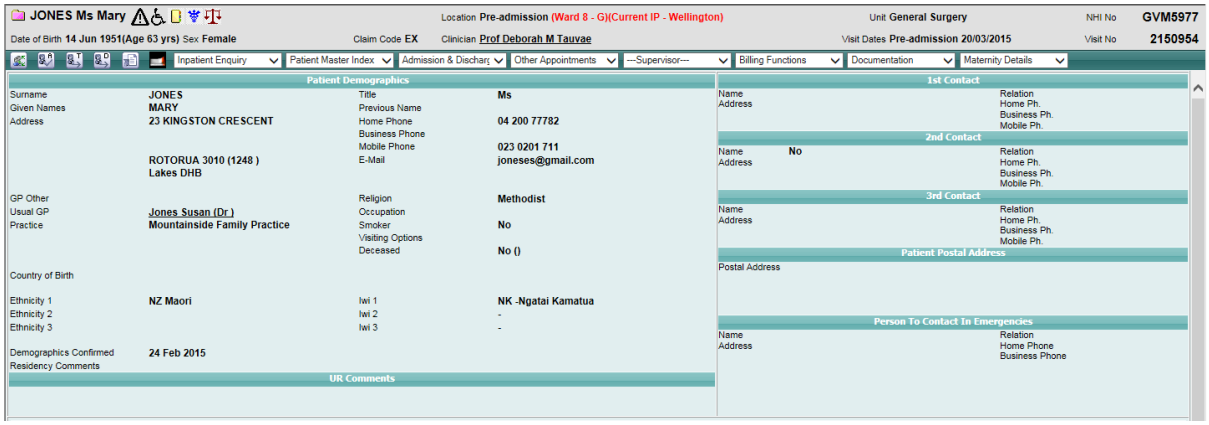
4.9.2 Viewing a Deleted Alert

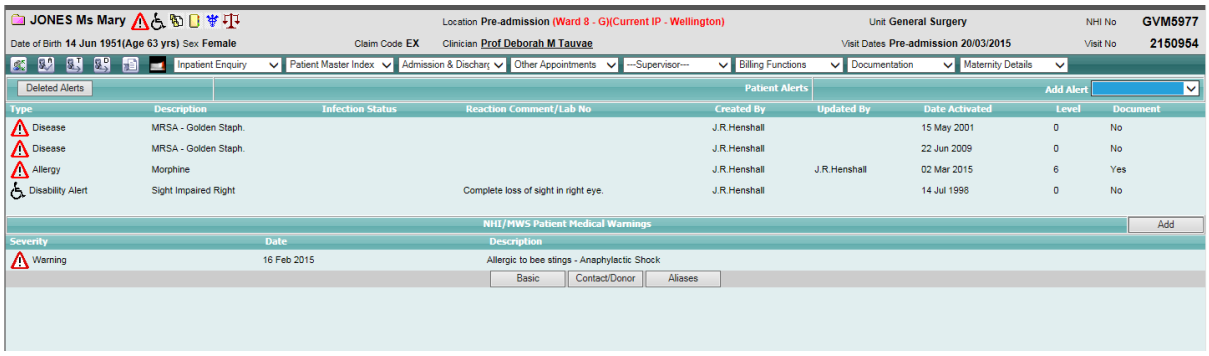
1. Navigate to the required patient.



2. Click the alert icon in the patient banner, or

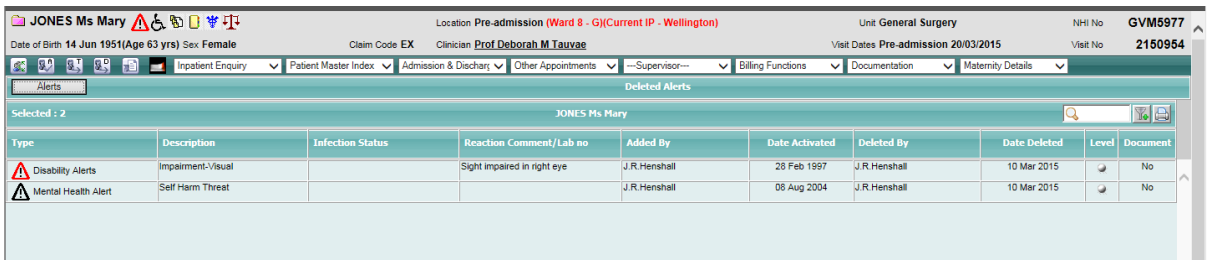
3. Select **Alerts** from the appropriate patient level drop down list.

The Alerts screen will display.



4. Select the **Deleted Alerts** button.

The Deleted Alerts screen will display.



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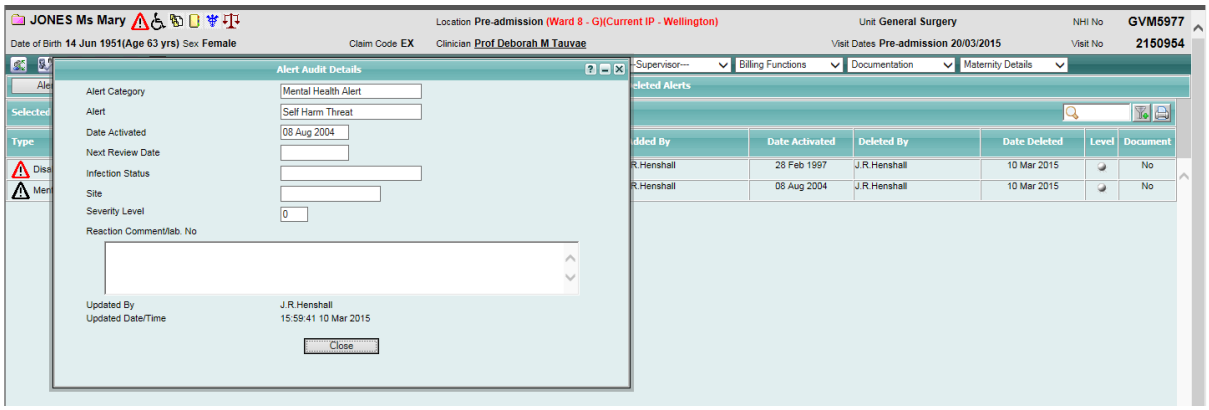
5. Click the alert icon beside the required record.

The Deleted Alert will display.



6. Click **Close**.

7. Click the **Alerts** button to return to the Patient Alerts screen.

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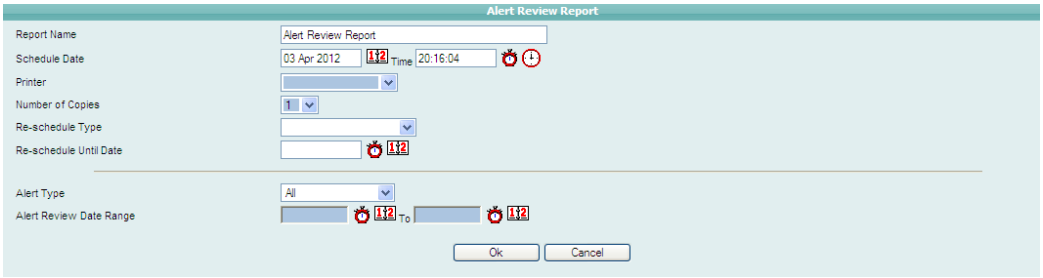
4.11 Alert Review Report

The Alert Review report enables users to enter an Alert Review Date Range and print a list of all patients that meet the criteria.

An Alert Type value can also be set, however the system defaults to All.



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5 Revision History

Date	Version	Description	Author
28 November 2014	10	Updated template and screens.	Kara Jaffe
10 February 2015	10	Updated for NZ market	Jonathan Henshall
15 September 2015	10	Added details on Previous GP and Practice	Jonathan Henshall
28 September 2016	10	Updated icons and screen shots	Juliet Iremonger
4 April 2017	10	Updated to include Alert History functionality	Debbie Tauvae

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