

CBF Stabilisation
Ministry of Health Business Support
Information Pack

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1 Introduction

Document Purpose

The purpose of this document is to provide the following:

- Present a 'contacts by topic' list that is generic so that the list is not affected by staff turnover.
- Provide an alternative to the existing temporary communications networks that develop over time between Ministry of Health staff and PHO payments stakeholders.
- Create a single or core "authoritative source" for complex problem solving e.g. tracing quarterly data processing errors.
- Identify the correct Ministry of Health staff to answer enquiries to ensure information provided is accurate.
- Provide a contacts list that can link to a number of relevant Ministry of Health staff rather than individual contacts.

CBF Administrators

The email cbf_admin@moh.govt.nz is available to all CBF Administrators including the HealthPAC PHO Team Manager, so can also be used for escalations.

DHB Support

The DHB Support facility is a channel for communication and not a decision making point. If a request has not been actioned in a timely or satisfactory manner, the DHB Support email is still the best point to access the escalation contact.

NZHS Inquiries Email

The inquiries@nzhis.govt.nz email is managed as a central point for communication with NZHS and should be used for queries and escalations.

Intended Audience

This document is intended for use by DHBs, PHOs, PHO Vendors, Management Services Organisation, DHBNZ, Ministry of Health, and HealthPAC.

For Further Information

If further information is required regarding change activity in HealthPAC, email dhbsupport@moh.govt.nz

2 HealthPAC: Requests for Work

PHO Services Eligibility Determination

| PHO Services Eligibility Determination | |
|--|--|
| Topic Description | Eligibility workflow is the process to determine whether a PHO is entitled to additional funding for reasons of PHO establishment, focused health initiatives or for reasons of certain population demographics. Examples include Careplus, Services to Increase Access, Health Promotion, and Management Fees etc. This funding is additional to the capitation funding derived from the enrolment registers. |
| Topic Scenarios (Hypothetical) | A PHO may have received an incorrect payment based on the eligibility criteria flagged in the CBF system. Examples include Careplus, Services to Increase Access, Health Promotion, and Management Fees etc. If a PHO believes its payment is incorrect a representative should call or email DHB Support to log the error. The call will be assigned to a CBF Administrator to investigate. |
| Responsible Agency | Ministry of Health |
| Responsible Department | Primary Health Care Implementation Team, Sector Capability & Innovation Directorate |
| Responsible Employee Title | Policy Analyst |
| Implementing Department | GMS/PHO Team - HealthPAC Operations, Ministry of Health. |
| Generic Email Contact | dhbsupport@moh.govt.nz |
| Contact Phone Number | 04 496 2109 |
| Extension | N/A |
| Web Link | http://www.moh.govt.nz/moh.nsf/indexmh/phcs-payments-eligibility |
| Escalation Procedure | In the instance that a PHO has not received a correct payment based on the eligibility data held by HealthPAC, the PHO should contact HealthPAC via DHB Support to have the issue investigated. |
| Escalation Contact | DHB Support |
| Escalation Contact Email | dhbsupport@moh.govt.nz |
| Escalation Contact Phone Number | 0800 458 448 |

Client Enrolment Activities

| Client Enrolment Activities | |
|---------------------------------|---|
| Topic Description | <p>The Client Enrolment Process workflow reflects the typical activities related to capturing and updating client or patient details, including enrolment, at a practice. Because of the number of practices, this workflow is subject to a great degree of variation within the sector for reasons of the practice's administration, protocols, systems and ultimately the relationship they have with their clients.</p> <p>Most client visits are from existing, PHO enrolled clients. The data the practice holds, either manually or electronically, can be of variable accuracy or completeness. Complete and accurate address data is important for subsequent capitation funding. Because a demographic profile is used as a proxy for the capitation-funding rate, a geo-spatial value is derived from the address data on each enrollee record.</p> <p>The Ministry's primary requirement of the practice is to achieve and provide accurate data for their enrolled and casual (for FFS adjustments) clients. As the calculation of capitation funding is derived from the data captured at source by the practice, it is imperative that processes and systems are in place to maximise the completeness and accuracy of the data associated with the individual.</p> |
| Topic Scenarios (Hypothetical) | A patient who was enrolled at a practice visited another practice and enrolled. When presenting at their usual practice queries the patient queries enrolment status and the patient contacts HealthPAC to establish where their funding is currently allocated. |
| Responsible Agency | HealthPAC |
| Responsible Department | Business Operations |
| Responsible Employee Title | CBF Administrator |
| Implementing Department | HealthPAC, Contact Centre. |
| Generic Email Contact | cbf_admin@moh.govt.nz |
| Contact Phone Number | 0800 458 448 |
| Extension | Option 1 |
| Web Link | http://www.moh.govt.nz/moh.nsf/indexmh/phcs-payments-clientenrol |
| Escalation Procedure | Log a DHB Support Call by emailing the DHB Support address. This will initiate a DHB Support call that will be logged and assigned to the relevant person for resolution. |
| Escalation Contact | GMS/PHO Team Manager, Business Operations, HealthPAC |
| Escalation Contact Email | dhbsupport@moh.govt.nz |
| Escalation Contact Phone Number | 04 381 5300 |

Quarterly Register Processing

| Quarterly Register Processing | |
|---------------------------------|---|
| Topic Description | The quarterly register process workflow reflects the flow of enrolment data from the source at practices, through aggregation and submission by the PHO, data enrichment and funding calculation by the Ministry and then deployment of the enriched individual registers back into the sector. The aggregated PHO Registers are first verified manually by HealthPAC and then subsequently against the reference data. PHOs are advised prior to full register processing whether there are issues with the submitted register. Once the submission window is closed, the registers are completely validated then enriched at Crichton and NZHIS for Geocode and NHI respectively. De-duplication occurs at a national level before final capitation calculation occurs. The resultant capitation figure is subsequently submitted to ProClaim for payment processing. The enriched, de-duplicated register is returned to PHOs, along with the Capitation Summary Report (CSR); where the PHO registers are disaggregated and distributed to the Practices for upload into their practice management systems. |
| Topic Scenarios (Hypothetical) | A PHO submits their register to HealthPAC for Quarterly Register Processing. Any queries relating to this activity, for example, resubmission of the register, should be directed to the CBF Administrators. |
| Responsible Agency | HealthPAC |
| Responsible Department | Business Operations |
| Responsible Employee Title | CBF Administrator |
| Implementing Department | Business Operations |
| Generic Email Contact | cbf_admin@moh.govt.nz |
| Contact Phone Number | 0800 458 448 |
| Extension | Option 1 |
| Web Link | http://www.moh.govt.nz/moh.nsf/indexmh/phcs-payments-quarterlyregister |
| Escalation Procedure | Log a DHB Support Call by emailing the DHB Support address. This will initiate a DHB Support call that will be logged and assigned to the relevant person for resolution. |
| Escalation Contact | GMS/PHO Team Manager, Business Operations, HealthPAC |
| Escalation Contact Email | dhbsupport@moh.govt.nz |
| Escalation Contact Phone Number | 0800 458 448 |

Monthly Payment Process

| Monthly Payment Process | |
|---------------------------------|---|
| Topic Description | <p>The payment process workflow occurs with different frequencies to that of the quarterly register process (i.e. monthly or on demand). In the first instance, ProClaim divides the quarterly capitation amount from CBF into three equal amounts which in turn is the starting amount for the monthly payment. Prior to the monthly payment run, or on an as required basis, financial adjustments are netted off from the calculated payment amount and subsequently paid from Proclaim. An electronic Buyer Created Tax Invoice (BCTI) is generated and submitted to the PHO to advise of the net amount to be received into the PHOs bank account.</p> <p>Prior to funds transfer, the DHBs have a 5 day window to stop the payment should they disagree with the adjusted amount calculated.</p> <p>Transactional reports, such as the BCTIs, FFS deduction reports, Cashflow statements, etc. are generated by either CBF or Proclaim to provide DHBs and PHOs with basic financial information.</p> |
| Topic Scenarios (Hypothetical) | |
| Responsible Agency | Population Health Directorate |
| Responsible Department | Primary Health Care Team |
| Responsible Employee Title | Financial Analyst |
| Implementing Department | Business Operations |
| Generic Email Contact | dhbsupport@moh.govt.nz |
| Contact Phone Number | 0800 458 448 |
| Extension | Option 3 |
| Web Link | http://www.moh.govt.nz/moh.nsf/indexmh/phcs-payments-monthly |
| Escalation Procedure | Log a DHB Support Call by emailing the DHB Support address. This will initiate a DHB Support call that will be logged and assigned to the relevant person for resolution. |
| Escalation Contact | DHB |
| Escalation Contact Email | dhbsupport@moh.govt.nz |
| Escalation Contact Phone Number | 0800 458 448 |

Payment Queries

| Payment Queries | |
|---------------------------------|--|
| Topic Description | <p>The payment process workflow occurs with different frequencies to that of the quarterly register process (i.e. monthly or on demand). In the first instance, ProClaim divides the quarterly capitation amount from CBF into three equal amounts which in turn is the starting amount for the monthly payment.</p> <p>Prior to the monthly payment run, or on an as required basis, financial adjustments are netted off from the calculated payment amount and subsequently paid from Proclaim. An electronic Buyer Created Tax Invoice (BCTI) is generated and submitted to the PHO to advise of the net amount to be received into the PHOs bank account.</p> <p>Prior to funds transfer, the DHBs have a 5 day window to stop the payment should they disagree with the adjusted amount calculated.</p> <p>Transactional reports, such as the BCTIs, FFS deduction reports, Cashflow statements, etc. are generated by either CBF or Proclaim to provide DHBs and PHOs with basic financial information.</p> |
| Topic Scenarios (Hypothetical) | A PHO queries the BCTI provided to the PHO, |
| Responsible Agency | HealthPAC |
| Responsible Department | Business Operations |
| Responsible Employee Title | CBF Administrator |
| Implementing Department | Contact Centre Consultant |
| Generic Email Contact | cbf_admin@moh.govt.nz |
| Contact Phone Number | 0800 458 448 |
| Extension | Option 5 |
| Web Link | www.moh.govt.nz/healthpac |
| Escalation Procedure | Log a DHB Support Call by emailing the DHB Support address. This will initiate a DHB Support call that will be logged and assigned to the relevant person for resolution. |
| Escalation Contact | Business Operations Manager, HeathPAC |
| Escalation Contact Email | dhbsupport@moh.govt.nz |
| Escalation Contact Phone Number | 0800 458 448 |

Financial Adjustments

| Financial Adjustments | |
|---------------------------------|---|
| Topic Description | Financial Adjustments |
| Topic Scenarios (Hypothetical) | <p>Financial adjustments are made for a number of reasons including:</p> <p>Error corrections Adjustments to address errors that may have occurred in previous months or quarters for any exception or reason. Requests for these adjustments could come from any sector participant including Practices.</p> <p>Policy adjustments Regular adjustments to instantiate or adjust the business rules that CBF should be using for a particular set of capitation rates.</p> <p>One-off adjustments Exceptional adjustments often initiated by a DHB including PHO establishment, Care Plus preparatory etc.</p> <p>FFS Adjustments Automated adjustments applied directly to Proclaim from GMS claims.</p> |
| Responsible Agency | Population Health Directorate |
| Responsible Department | Primary Health Care Policy Team |
| Responsible Employee Title | Analyst |
| Implementing Department | HealthPAC, Business Operations |
| Generic Email Contact | primary_healthcare@moh.govt.nz |
| Contact Phone Number | 0800 458 448 |
| Extension | Option 3 |
| Web Link | http://www.moh.govt.nz/moh.nsf/indexmh/phcs-payments-financialadjust |
| Escalation Procedure | Log a DHB Support call. This will be assigned to the correct person within HealthPAC to investigate. |
| Escalation Contact | GMS/PHO Team Manager, Business Operations |
| Escalation Contact Email | dhbsupport@moh.govt.nz |
| Escalation Contact Phone Number | 0800 458 448 |

CBF HL7 Message Changes

| CBF HL7 Message Changes | |
|---------------------------------|---|
| Topic Description | The HL7 messaging standard is used by the Ministry. Changes to variables in this standard will be implemented by following the Change Visibility Process. |
| Topic Scenarios (Hypothetical) | |
| Responsible Agency | HealthPAC |
| Responsible Department | Strategy and Development, HealthPAC |
| Responsible Employee Title | Reference Data Analyst, Strategy and Development and the Sector Vendor Liaison Advisor |
| Implementing Department | Strategy and Development, HealthPAC for the Sector Vendor Liaison Advisor |
| Generic Email Contact | dhbsupport@moh.govt.nz |
| Contact Phone Number | 04 381 5300 |
| Extension | N/A |
| Web Link | http://www.moh.govt.nz/moh.nsf/indexmh/phcs-payments-hl7messages |
| Escalation Procedure | Log a DHB Support Call by emailing the DHB Support address. This will initiate a DHB Support call that will be logged and assigned to the relevant person for resolution. |
| Escalation Contact | Programme Management Office |
| Escalation Contact Email | dhbsupport@moh.govt.nz |
| Escalation Contact Phone Number | 04 4962467 |

PHO Data Mart Queries

| PHO Data Mart Queries | |
|---------------------------------|--|
| Topic Description | <p>The purpose of the PHO Enrolment Collection is to provide a national collection that holds Primary Healthcare System (PHCS) patient enrolment data for the following uses:</p> <ul style="list-style-type: none"> To assist PHOs, DHBs and the Ministry of Health in reporting and monitoring patient enrolment under the PHCS To provide PHOs, DHBs, the Ministry of Health and health researchers with population data to assist with population health research To assist PHOs in examining and improving the quality of their enrolment information. |
| Topic Scenarios (Hypothetical) | A DHB requests for information to assist in reporting on en |
| Responsible Agency | NZHIS |
| Responsible Department | Analytical Services |
| Responsible Employee Title | Analyst |
| Implementing Department | NZHIS |
| Generic Email Contact | inquiries@nzhis.govt.nz |
| Contact Phone Number | (04) 816 2870 |
| Extension | N/A |
| Web Link | www.nzhis.govt.nz/serviceguide.html |
| Escalation Procedure | Log a call by emailing the operations email address. This will initiate a DHB Support call that will be logged and assigned to the relevant person for resolution. |
| Escalation Contact | Group Manager, NZHIS |
| Escalation Contact Email | inquiries@nzhis.govt.nz |
| Escalation Contact Phone Number | (04) 816 2859 |

CBF System Changes

| CBF System Changes | |
|---------------------------------|--|
| Topic Description | CBF System Changes occur in a number of formats and at different times throughout the year. Most of these changes will not have an immediate impact on DHBs, PHOs or practices but will have an effect on the processing systems HealthPAC uses. |
| Topic Scenarios (Hypothetical) | If a PHO or practice logs a query that might result in a CBF systems change it will be investigated and managed by Strategy and Development, HealthPAC. |
| Responsible Agency | HealthPAC |
| Responsible Department | Strategy and Development, HealthPAC |
| Responsible Employee Title | Strategy and Development Analyst |
| Implementing Department | Strategy and Development, HealthPAC and ITS |
| Generic Email Contact | Ministry of Health Information Technology Services |
| Contact Phone Number | dhbsupport@moh.govt.nz |
| Extension | 0800 458 448 |
| Web Link | Option 3 |
| Escalation Procedure | www.moh.govt.nz/healthpac |
| Escalation Contact | Strategy and Development Team Manager |
| Escalation Contact Email | dhbsupport@moh.govt.nz |
| Escalation Contact Phone Number | 04 381 5300 |

Appendix A: Terms, Abbreviations, and Acronyms

| ABBREVIATION / ACRONYMS | DEFINITION / DESCRIPTION |
|-------------------------|--|
| ACG | Analyst Coordinators Group |
| BAU | Business As Usual |
| BSS | HealthPAC Business Support Services |
| CBF | Capitation Based Funding (System) |
| CCPS | Client Claims Processing System |
| CFPP | Capitation Funding Payment Process (former term for CPI: Stabilise) |
| CID | Corporate and Information Directorate |
| CMS | Contract Management System |
| CPI: Stabilise | Capitation Payments and Information Project: Stabilise Workstream (NSDP) |
| CSD | Clinical Services Directorate |
| DHB | District Health Board |
| HealthPAC | Health Payments, Agreements and Compliance, Ministry of Health |
| ILG | Information Liaison Group |
| ISMT | Information Systems Management Team, CID |
| ITS | Information Technology Shared Services, a business unit of the Ministry |
| MoH | Ministry of Health |
| NSDP | National Systems Development Programme |
| NZHIS | New Zealand Health Information Service, a business unit of the Ministry |
| PCWG | Primary Care Work Group |
| PHO | Primary Health Organisation |
| PHT | Primary Health Team, CSD |
| PSAAP | PHO Standard Agreement Amendment Protocol Group |
| SDG | Strategy and Development Group - Part of HealthPAC. |
| UAT | User Acceptance Testing |

END OF DOCUMENT