



## Enrolment pack for new patients

There are many important steps involved in enrolling a new patient with your practice. If these are completed correctly, your patients will have access to the full range of services and funded programmes they are entitled to receive.

However, if the enrolment isn't completed correctly, your practice could receive funding for patients who are not eligible, or your patient could miss out on important services such as WellSouth's clinically funded programmes and other PHO-supported initiatives. In the worst-case scenario, your practice may be required to repay funding and could face compliance action if audited by Health New Zealand.

### What is the advantage of an Enrolment Pack?

Having all documentation within one package, ensures the new patient is getting all the information they require to make an informed decision to enrol with your practice.

It also ensures that they have all the necessary forms to complete and the regulations as to why they can/cannot enrol with your practice.

### How does this process work:

All the documents are placed in a plastic sleeve, sitting at reception ready to be handed out to people wanting to enrol. The new patient takes the pack home, completes the forms and places them along with their ID and evidence to enrol back in the sleeve. The patient ticks off the checklist to ensure they have everything required to enrol. The sleeve is then returned to the practice where:

1. The new patient signs and dates the enrolment form in front of the receptionist
2. The ID and evidence is checked by the receptionist
3. The ID and evidence is returned to the patient
4. The receptionist uploads all the details into the PMS and scans all documents

### Enrolment dates in PMS/NES/Enrolment Form:

The date on the Patient Enrolment Form should match the confirmed enrolment date in the PMS and the NES. During an audit HNZ will accept dates as 'matching' where there are up to 3 days of difference between the date on the form and NES.

### Enrolment pack editable documents:

Enrolment Form [Patient Enrolment Form](#)

Share Information Consent [Patient Share Information Consent Form](#)

Medical Questionnaire [Patient Medical Questionnaire](#)

Enrolment checklist [Enrolment Pack Checklist](#)

Welcome Letter [Patient Welcome Letter](#) (designed to be an outbox document to email to patient)

Summary Eligibility Check Sheet [Eligibility Check Sheet](#)

[Health-Information-Privacy-Statement](#)

## Frequently asked questions answered by Justin McCullough, Te Whatu Ora

- **When the PMS\* has DIA\* data share – does the practice have to ask for proof of identity?**

Yes, just to make sure the person enrolling is the person they say they are.

- **When the PMS has DIA data share – does the practice have to ask for proof of eligibility?**

No, if the practice sees that a patient is a NZ Citizen via DIA Data share, you do **not** need to seek any other evidence of eligibility.

- **When the PMS has Migrated or BREG\* – does the practice have to ask for proof of eligibility?**

Health New Zealand, suggest you seek other sources. Anything other than DIA Data share cannot be 100% guaranteed as accurate as different people from different agencies (not just Govt) can update these fields. They may be mostly accurate but just can't be guaranteed yet.

- **Does the practice require two forms of identity when enrolling patients or is a passport enough?**

No, a Passport is the Gold Star of identity, and for New Zealanders, eligibility also. If a practice has seen a NZ Passport, for enrolment, no other evidence of eligibility or identity need be asked for. In the absence of a passport, two forms of ID is best practice, but in reality, some people don't hold two forms. A Driver's License on its own, with a picture on it, is enough to prove identity. Practices just need to see enough to ensure they are satisfied that a person is who they say they are. So, try and get two pieces of identity, but it isn't always required.

\* PMS – Practice Management System

\* DIA – Department of Internal Affairs

\* BREG – Birth Register

## Resources:

Please contact your Practice Partner to order the 'Enrolling with a General Practice' brochure.

<https://www.tewhatauora.govt.nz/for-health-providers/resources-for-service-providers-to-check-eligibility/eligibility-checklists-and-decision-trees>

<https://www.healthnz.govt.nz/hospitals-services/eligibility-subsidies/publicly-funded-healthcare>

## Feedback/Suggestions

Want to give feedback? Like these pages? Have a topic you want me to cover?

Please feel free to email me as I love hearing from practices [karen.bolch@wellsouth.org.nz](mailto:karen.bolch@wellsouth.org.nz)