



Pre-2011 Patient Enrolment Forms

Te Whatu Ora requires **all patients enrolled using pre-2011 enrolment forms to complete a new enrolment form**. This is due to mandatory declarations that are missing on the older forms, which no longer meet current enrolment standards.

Latest version of Patient Enrolment Form

The latest version of the patient enrolment form now includes mandatory declarations for patients regarding the following:

- Health Information Privacy Statement / HealthOne / Adult Primary Care Survey

The latest version of the patient enrolment form is available here:

<https://wellsouth.nz/provider-access/admin-resources/data-and-it/how-to-guides>

A copy of the patient enrolment form with merge fields (Evolution) to use as an outbox document that will prepopulate most demographics is available here (*doesn't include gender or ethnicity*):

<https://wellsouth.nz/provider-access/admin-resources/data-and-it/how-to-guides>

How do you identify patients that require a new form

Thalamus has a report pulled directly from NES that identifies these patients. Go to Register Management > click on Register Updates > report is called **pre-2011 enrolments** > click on view pre-2011 enrolments. This list will also show the date of the patient's next consult (if they have one booked). These lists will be updated around the 5th of every month.

Register Updates

Practice	338,673	338,673	73,911	75,703	1,233	697	1,011								
	Selected Popula...	Funded Populati...	CSC	High Needs	HUHC	Expiring this mo...	Expiring next month								
Facility	Percentage of Enrolled People / Ethnicity				<table border="1"> <tr> <td>2,892</td> <td>697</td> <td>1,011</td> <td>3,126</td> </tr> <tr> <td>Expired Enrolments</td> <td>Expires This Month</td> <td>Expires Next Month</td> <td>Expire Next 3 Mths</td> </tr> </table>			2,892	697	1,011	3,126	Expired Enrolments	Expires This Month	Expires Next Month	Expire Next 3 Mths
2,892	697	1,011	3,126												
Expired Enrolments	Expires This Month	Expires Next Month	Expire Next 3 Mths												
Practitioner					<table border="1"> <tr> <td>1,223</td> <td>83</td> <td>222</td> <td>208</td> </tr> <tr> <td>CSC Expiring</td> <td>HUHC Expiring</td> <td>Gender Unknown</td> <td>Ethnicity Unknown</td> </tr> </table>			1,223	83	222	208	CSC Expiring	HUHC Expiring	Gender Unknown	Ethnicity Unknown
1,223	83	222	208												
CSC Expiring	HUHC Expiring	Gender Unknown	Ethnicity Unknown												
Ethnicity					<table border="1"> <tr> <td>3,049</td> <td>353</td> <td>70K</td> <td>15</td> </tr> <tr> <td>Quintile 0</td> <td>Death Recorded</td> <td>Unassigned Patients</td> <td>Facility Missing</td> </tr> </table>			3,049	353	70K	15	Quintile 0	Death Recorded	Unassigned Patients	Facility Missing
3,049	353	70K	15												
Quintile 0	Death Recorded	Unassigned Patients	Facility Missing												
Gender	Patients in PHO Funding Age Groups				<table border="1"> <tr> <td>66K</td> <td>4,851</td> <td>3,688</td> <td>2,997</td> </tr> <tr> <td>Quintile Mismatch</td> <td>Quintile Funding ...</td> <td>Potential HUHC</td> <td>Meshblock Missing</td> </tr> </table>			66K	4,851	3,688	2,997	Quintile Mismatch	Quintile Funding ...	Potential HUHC	Meshblock Missing
66K	4,851	3,688	2,997												
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Age Group					<table border="1"> <tr> <td>345</td> <td>324</td> <td>111</td> <td>272</td> </tr> <tr> <td>16y/o This Month</td> <td>16y/o Next Month</td> <td>Via This Month</td> <td>Via Next Month</td> </tr> </table>			345	324	111	272	16y/o This Month	16y/o Next Month	Via This Month	Via Next Month
345	324	111	272												
16y/o This Month	16y/o Next Month	Via This Month	Via Next Month												
Quintile					<table border="1"> <tr> <td>262</td> <td>34K</td> <td>821</td> </tr> <tr> <td>Pre-Enrolments</td> <td>Pre-2011 Enrolments</td> <td>enrolment issue</td> </tr> </table>			262	34K	821	Pre-Enrolments	Pre-2011 Enrolments	enrolment issue		
262	34K	821													
Pre-Enrolments	Pre-2011 Enrolments	enrolment issue													
HUHC															
High Needs															
TLA															

The most effective way to get new forms signed by patients

Place an alert on patients in the PMS who need to complete a new enrolment form so you can identify them when they next come into the practice. Once patients have completed the new enrolment form, you will need to re-enrol them in your PMS and which will sync with NES. Remove the alert on the PMS. Patients may have the opportunity to complete the form while they are waiting to see their health professional.

Reminder: This is also a great opportunity to double-check that you have up-to-date evidence and entitlement for enrolment for these patients.

Unfortunately, online enrolment forms are not suitable for re-enrolments. However, we have been in contact with the PMS Vendors to request if this can be implemented in future.

PMS process for re-enrolling patients that will update NES:

Medtech Evolution:

Bring the patient up on the pallet. Click on the Enrolment Funding tab, click on re-enrol icon

The screenshot shows the 'Patient Register' window with the 'Enrolment Funding' tab selected. The 'Re-enrol' button is highlighted with a red box. The 'Enrolment Details' section shows 'Enrolment Status' as 'Confirmed Enrolment (C)', 'Date Confirmed' as '30/11/2017', and 'Method of Enrolment' as 'Form - Only Valid PHO Option (F)'. The 'Re-enrolment Date' field is also highlighted with a red box.

Enter the date of re-enrolment as per the date on the enrolment form and tick 'form' as method

The screenshot shows the 'Patient Register' window with the 'Enrolment Funding' tab selected. A 'Re-enrol Patient' pop-up window is displayed, asking 'Are you sure you want to re-enrol'. The 'Date Confirmed' field is set to '30/11/2017' and the 'Method of Enrolment' is set to 'Form - Only Valid PHO Option (F)'. The 'Re-enrol' button is highlighted with a red box.

This pop up will confirm that the patient has been re-enrolled. Click OK.

The screenshot shows the 'Patient Register' window with the 'Information' pop-up window displayed. The message reads: 'The patient has been successfully Re-enrolled.' The 'OK' button is highlighted with a red box.

MyPractice:

Bring the patient up on the pallet.

In patient details there is a link 'NEW Enrolment' which allows you to enrol or **re-enrol** the patient. Once clicked, new E-Enrolment should appear under the Schemes.

The date should be the same date as on the new enrolment form.

The screenshot displays the 'MyPractice' patient management interface. The main area shows patient details for Ashwin Patel, including their preferred name, practice number, source, type (Regular), created date (23/02/2005), last seen date (22/11/2024), and NHI number (ABC1235). Below this, there are sections for 'Schemes' and 'Relationships'. The 'Schemes' section lists various API types and their start/expiry dates. The 'Relationships' section shows a relationship with a chemist. The 'Family Members' section is also visible. On the right side, there is a vertical menu with various options. The 'NEW Enrolment' option is highlighted with a red box and a red arrow pointing to it. The menu also includes options like 'Clinical Notes', 'Accounts', 'Post It Note', 'Appointment History', 'Change Log', 'Label -Single', 'Labels -Page', 'Label -Lab Specimen', 'Document', 'New Family Member', 'Update Family', 'Check for Duplicates', 'Merge Record', 'Delete this Patient', 'Portal Registration', 'NES Schemes Update', 'NES Preferences Update', 'NES Last Encounter Date', 'NES Dis-Enrolment', and 'Import from JotForms'. At the top of the menu, there are 'Cancel' and 'Finish' buttons. At the bottom of the menu, there are 'Account' and 'Consent' buttons.

Type	Start	Expiry	Reference
ACC API			25/05/2021
Antibiotic Conservation Pr	23/07/2024		
e-Prescription API	29/06/2022		

Relationship	With	Notes
Chemist	00000000-0000-0000-00	Bethlehem Dispensary [F

Family Members

Family to join: [] [X] Leave [+] Add Member [G] Goto

Cancel [X] Finish [Y]

Account [Y] Consent [Y]

Indici:

Bring the patient up on the pallet. On the 3rd tab of the enrolment edit page you will need to update the enrolment tab.

MOUSEA Mickey 01/03/2002 New Zealand European +64221409208 1 Streets Way Upper Hutt 5018 Upper Hutt NHI: ZDN7222 **NES** **HA**

1 Patient Details 2 Employment & Insurance Details 3 Enrolment & Funding 4 Enrolment at Victoria Clinic 5 NHI Sync Prev Next

Patient Registration
 Registered Status: Registered (R) Account Group: Accounts
 Registration Date: 08/08/2024 GMS Code: Adult (A)

Patient Enrolment
 Enrolment Status: Confirmed Enrolment (C) Enrolment ID: 20027868
 Method of Enrolment: Form - only valid PHO option (F) Enrolment Verifier: Judy GILMOUR
 Enrolment Date: 17/02/2020 Enrolment Expiry Date: 17/10/2028
 NES Enrolment/Re-Enrolment Date: 17/10/2025 NES Enrolment End Date: Enrolment End Date

Patient Funding
 Funding Status: Funded (F) Reason for Rejection: Reason for Rejection
 Funding From: 01/07/2025 Funding To: 31/10/2028
 Last ASR Date: Last QED Sent Date: Funding Inclusion Date: 30/09/2025

Patient Residential Status
 Residential Status: New Zealand Is NZ Citizen? Get From NHI

Geocoding Information (Geostan)
 Address: 1 Streets Way, Upper Hutt 5018
 Uncertainty Code: Meshblock: 4003061
 DHB Code: G00006-F Quintile: 1
 Latitude: Longitude:

Account Details
 Last Statement: 23/09/2025 Last Invoiced: 14/10/2025
 Last Payment: 21/10/2025

Click To Add Documents

Passport Passport Expiry Driving Licence Driving Licence Expiry Finger Prints IRIS Scan Face Recognition Birth Certificate Visa Visa Expiry

No record found.

Then go to the 5th Tab and re-enrol on the NES.

The date should be the same date as on the new enrolment form.

1 Patient Details 2 Employment & Insurance Details 3 Enrolment & Funding 4 Enrolment at Victoria Clinic 5 NHI Sync Prev Finish

Patient Details
 Name: Family Name: MOUSEA Given Name: Mickey Other Given Name:
 Core Demographic: Gender: Male Date of Birth: 01/03/2002 Date of Birth Source: Birth Certificate Date of Death: ZDN7222
 Birth Place: Place of Birth: New Zealand Country of Birth: New Zealand Country of Birth Source: Passport
 Address: MHI Address ID: Permanent Address Find Address in eSAM: 1 Street Address: Streets Way Suburb/Town: Manly City: Upper Hutt Post Code: 5018 Latitude: Longitude: Address not validated
 Ethnicity: Ethnicity1: New Zealand European Ethnicity2: Ethnicity3: Ethnicity4: Ethnicity5: Ethnicity6:

Enrolment at Victoria Clinic
 Name: Family Name: MOUSEA Given Name: Mickey Other Given Name:
 Core Demographic: Gender: Male Date of Birth: 01/03/2002 Date of Birth Source: Birth Certificate Date of Death: ZDN7222
 Birth Place: Place of Birth: NEW ZEALAND Country of Birth: NEW ZEALAND Country of Birth Source: Passport
 Address: MHI Address ID: Address 1 (Primary) Find Address in eSAM: 1 Street Address: Streets Way Suburb/Town: Manly City: Upper Hutt Post Code: 5018 Latitude: Longitude: Address not validated
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National Enrolment Service

NES: Re-Enrol Patient NES: Unenrol Patient NES: View Active Enrolment NES: Update & Sync: Index / Help

If you are uncertain on any of the processes above, please contact your PMS vendor.