



## **Te Kauwhata Health Centre New Patient Record Policy & Procedure**

### **POLICY / PROCEDURE STATEMENT**

Te Kauwhata Health Centre aims to process new patient records in a timely and efficient manner, with a focus on getting new patients enrolled with all relevant medical information to be received at the practice and reviewed by appropriate members of the clinical team as soon as possible to ensure continuity of care for those transferring between providers.

### **POLICY / PROCEDURE OBJECTIVES**

That patients enrolling with the practice are informed of the process, all team members understand the parts they play in the process, and that medical information for new patients is processed in a timely and accurate manner.

### **KEY STAFF MEMBERS**

- Reception/Administration Team members
- Nurse Team members
- Prescriber Team members (Doctors, Nurse Practitioners & Nurse Prescribers)

### **PROCESSES**

#### **Administration Team**

Administration team hand out the enrolment forms. These are also available to download from our website [www.tkhealth.co.nz](http://www.tkhealth.co.nz). They also give a the "Transferring of Notes" form to fill in, a privacy statement and explain the identification requirements. Patients are supplied with the welcome form inviting them to submit further information and identify how they will access care at the practice. Patients are advised that there is a two week standdown when enrolling, to allow time to request and process medical files. Once patients have filled them in, the Administration team members receive them, and put them in the appropriate place for processing.

When processing, a member of the Administration team enters the new patients details to Medtech32 and fax or emails the "Transferring of Notes" form to the previous medical centre. This takes place within 4 working days of the enrolment form being handed in. Transfer forms

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are annotated as well as a note in Medtech32 that notes have been requested. Notes are requested to be sent via “GP2GP” transfer.

Once the electronic file has been received, a member of the administration team will import the notes and allocate a patient file number. This member will check the enrolment form and ID has been scanned into the patients notes, and the enrolment date is correct. Admin will set a task for ‘new notes’ for the clinical team.

### **Nursing team**

Once a new patients records have been received and processed by the Administration team, a task is created in Medtech32 for the Nurse team of “New Patient Notes”. The Nurse team within two weeks (sooner if indicated by patient need) will review the files and set appropriate recalls for immunisations and for screening for chronic disease management. Cervical screening is contacted to get the patients history of smears, and if no record of immunisations a search is done with the National Immunisation Register. When the nurse has finished with the new patients notes and screening/recalls are up to date, they label the task ‘nurse done’, which indicates the prescribing team and go on and do their part.

### **Prescriber Team**

The task in the new notes, is label ‘new, nurse done’. The prescriber team then knows it is their time to go through the new electronic patient notes. If hard copy notes have been received these are given to the Clinical Lead for review/delegation.

The Prescriber team review the clinical notes, inbox and welcome form. Update Classifications medications and allergies. If medically indicated (high level of clinical complexity), the Prescriber Team send a task to the Administration Team to invite the patient in for clinical review in an initial appointment with a member of the Prescriber Team.

For those of low medical complexity but of an age / ethnicity where Cardiovascular screening might be indicated, the Prescriber creates a blood test form and sends a task to the Nurse Team to please request the patient books an initial visit for biometrics / blood pressure, bloods CV risk

Files with low clinical complexity are review and no further action taken by the Prescriber team until the patient contacts us needing care.

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