

**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](mailto: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](mailto: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](mailto: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	<a href="mailto:dhbsupport@moh.govt.nz">dhbsupport@moh.govt.nz</a>
Contact Phone Number	04 496 2109
Extension	N/A
Web Link	<a href="http://www.moh.govt.nz/moh.nsf/indexmh/phcs-payments-eligibility">http://www.moh.govt.nz/moh.nsf/indexmh/phcs-payments-eligibility</a>
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	<a href="mailto:dhbsupport@moh.govt.nz">dhbsupport@moh.govt.nz</a>
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	<a href="mailto:cbf_admin@moh.govt.nz">cbf_admin@moh.govt.nz</a>
Contact Phone Number	0800 458 448
Extension	Option 1
Web Link	<a href="http://www.moh.govt.nz/moh.nsf/indexmh/phcs-payments-clientenrol">http://www.moh.govt.nz/moh.nsf/indexmh/phcs-payments-clientenrol</a>
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	<a href="mailto:dhbsupport@moh.govt.nz">dhbsupport@moh.govt.nz</a>
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	<a href="mailto:cbf_admin@moh.govt.nz">cbf_admin@moh.govt.nz</a>
Contact Phone Number	0800 458 448
Extension	Option 1
Web Link	<a href="http://www.moh.govt.nz/moh.nsf/indexmh/phcs-payments-quarterlyregister">http://www.moh.govt.nz/moh.nsf/indexmh/phcs-payments-quarterlyregister</a>
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	<a href="mailto:dhbsupport@moh.govt.nz">dhbsupport@moh.govt.nz</a>
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	<a href="mailto:dhbsupport@moh.govt.nz">dhbsupport@moh.govt.nz</a>
Contact Phone Number	0800 458 448
Extension	Option 3
Web Link	<a href="http://www.moh.govt.nz/moh.nsf/indexmh/phcs-payments-monthly">http://www.moh.govt.nz/moh.nsf/indexmh/phcs-payments-monthly</a>
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	<a href="mailto:dhbsupport@moh.govt.nz">dhbsupport@moh.govt.nz</a>
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	<a href="mailto:cbf_admin@moh.govt.nz">cbf_admin@moh.govt.nz</a>
Contact Phone Number	0800 458 448
Extension	Option 5
Web Link	<a href="http://www.moh.govt.nz/healthpac">www.moh.govt.nz/healthpac</a>
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	<a href="mailto:dhbsupport@moh.govt.nz">dhbsupport@moh.govt.nz</a>
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><b>Error corrections</b> 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><b>Policy adjustments</b> Regular adjustments to instantiate or adjust the business rules that CBF should be using for a particular set of capitation rates.</p> <p><b>One-off adjustments</b> Exceptional adjustments often initiated by a DHB including PHO establishment, Care Plus preparatory etc.</p> <p><b>FFS Adjustments</b> 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	<a href="mailto:primary_healthcare@moh.govt.nz">primary_healthcare@moh.govt.nz</a>
Contact Phone Number	0800 458 448
Extension	Option 3
Web Link	<a href="http://www.moh.govt.nz/moh.nsf/indexmh/phcs-payments-financialadjust">http://www.moh.govt.nz/moh.nsf/indexmh/phcs-payments-financialadjust</a>
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	<a href="mailto:dhbsupport@moh.govt.nz">dhbsupport@moh.govt.nz</a>
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	<a href="mailto:dhbsupport@moh.govt.nz">dhbsupport@moh.govt.nz</a>
Contact Phone Number	04 381 5300
Extension	N/A
Web Link	<a href="http://www.moh.govt.nz/moh.nsf/indexmh/phcs-payments-hl7messages">http://www.moh.govt.nz/moh.nsf/indexmh/phcs-payments-hl7messages</a>
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	<a href="mailto:dhbsupport@moh.govt.nz">dhbsupport@moh.govt.nz</a>
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"> <li>• To assist PHOs, DHBs and the Ministry of Health in reporting and monitoring patient enrolment under the PHCS</li> <li>• To provide PHOs, DHBs, the Ministry of Health and health researchers with population data to assist with population health research</li> <li>• To assist PHOs in examining and improving the quality of their enrolment information.</li> </ul>
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	<a href="mailto:inquiries@nzhis.govt.nz">inquiries@nzhis.govt.nz</a>
Contact Phone Number	(04) 816 2870
Extension	N/A
Web Link	<a href="http://www.nzhis.govt.nz/serviceguide.html">www.nzhis.govt.nz/serviceguide.html</a>
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	<a href="mailto:inquiries@nzhis.govt.nz">inquiries@nzhis.govt.nz</a>
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	<a href="mailto:dhbsupport@moh.govt.nz">dhbsupport@moh.govt.nz</a>
Extension	0800 458 448
Web Link	Option 3
Escalation Procedure	<a href="http://www.moh.govt.nz/healthpac">www.moh.govt.nz/healthpac</a>
Escalation Contact	Strategy and Development Team Manager
Escalation Contact Email	<a href="mailto:dhbsupport@moh.govt.nz">dhbsupport@moh.govt.nz</a>
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**