

Release Notes

Rx Medical Australia

Patient Name Validation Utility

August 2015



These Release Notes contain important information for Rx Medical users. Please ensure that they are circulated amongst all your relevant staff. We suggest that they are filed safely for future reference.

Table of Contents

Patient Name Validation Utility	3
Introduction	3
Criteria to run this Utility	3
Patient Name Validation Utility	4
Steps to download the utility.....	4

Patient Name Validation Utility

Introduction

Presently, Rx Medical supports patient names with special characters in it. Previously, Medicare had no explicit rules on validation of a patients name with special characters for the purpose of processing a claim. Therefore the application did not have any set rules for patient's name.

The screenshot shows a software window with tabs for 'General', 'Patient', 'Comments/Family Groups', and 'Debtor'. Below the tabs, it says 'Following are details regarding this person, whether they are a patient or a debtor in the practice.' The form contains several input fields: Title (Mrs), Surname (S O & C), Given Name(s) (W), Preferred Name (e), Street (entstreet1), Suburb (suburb), State (p), and Postcode. The Surname field is highlighted with a red rectangular box.

However, as per the latest Medicare validation rule, Medicare will no longer process claims that have Patient/Debtor **First Name** and/or **Surname** which contains special characters other than 'Hyphen' and 'Apostrophe'. In addition, there should be no spaces before or after the permitted special characters i.e. 'Hyphen' and 'Apostrophe'.

Samvo'Co	✓
Samvo&Co	✗
Samvo - Co	✗

Criteria to run this Utility

- This **Patient Name Validation Utility** is able to be run for all practices on any version of Rx Medical.
- This utility is available as a file that can be downloaded from the **Medtech Global website** www.medtechglobal.com
- After the file has been downloaded, it should be moved to the '...\RXSQL\Utilites' folder of the Rx Medical application, the standard location for all the Rx Utility files.
- The Utility must be run from the **Rx Medical Server** machine.

- It is **not** a requirement for all Rx Medical users to log out of Rx Medical to run this utility – all Rx Medical users can still be logged on whilst the utility is running.

Patient Name Validation Utility

In the current implementation, it is quite difficult to search for the 'Patients' or 'Debtor' who have special characters in the **First Name** and/or **Surname** field in their **Patient Details** window.

Therefore, this '**Patient Name Validation Utility**' has been provided to our Rx Medical practices to assist in identifying those patients that have any special characters, or additional spaces, in their name fields.

IMPORTANT NOTE

The **Patient Name Validation** utility will only display those Patients' names with special characters from the database and **will not** automatically remove the special characters from the database. The user will have to manually edit the special characters from the **First Name** and/or **Surname** fields in the **Patient Details** window, for each patient.

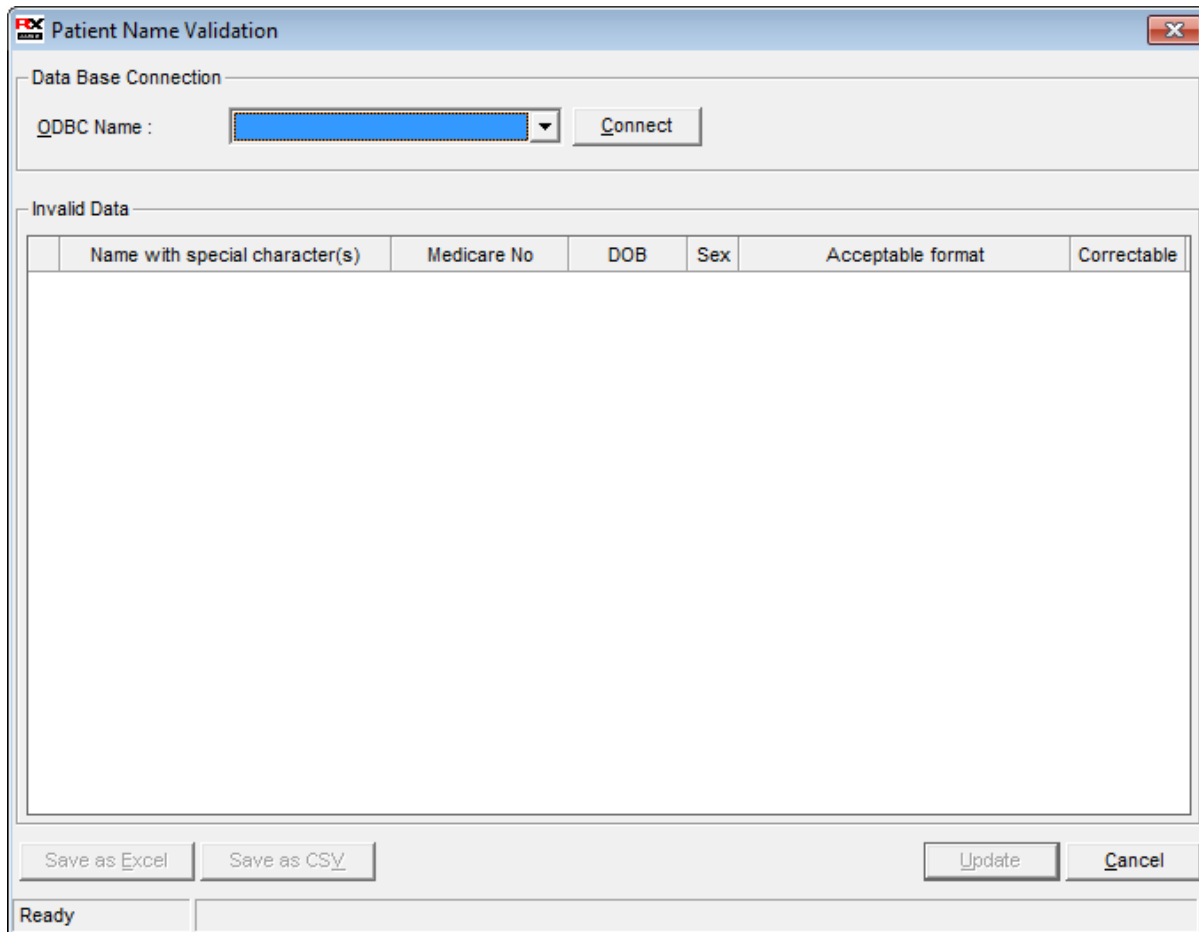
This utility has been released so that this can be **applied irrespective** of the **Rx Medical application version**.

Steps to download the utility

Please follow the following steps below to successfully download and execute the utility.

- Go to the **Medtech Global website** <http://www.medtechglobal.com/au/>
- Select **Support** → **Downloads** column → **Rx downloads** → **Useful Tools and Documents**
- Click on the link to download the utility and copy it to the '**...\Utilities**' folder of **Rx Medical** to access the utility – **PatientNameValidation.EXE**
- The utility is now ready to execute.
- Double-click the **PatientNameValidation.EXE** to bring up the **Patient utility window**.

The following window will be displayed when double clicking on the utility file.

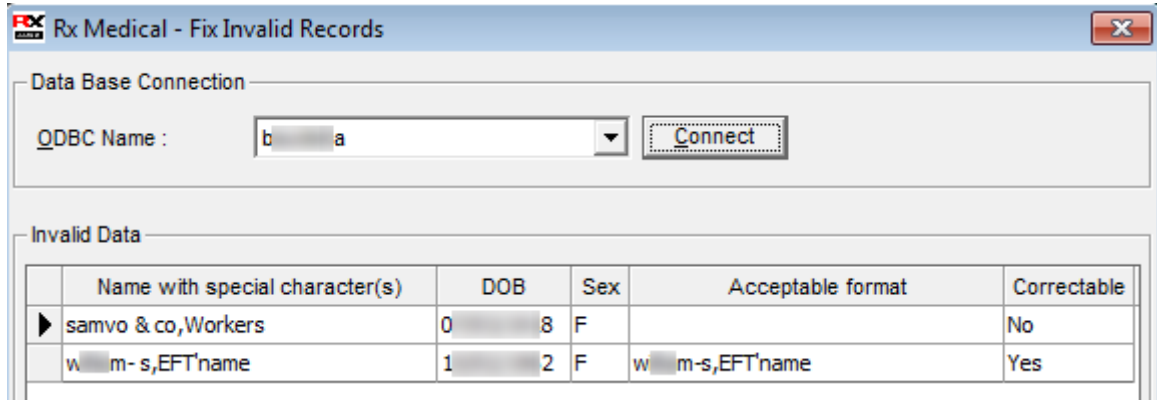


- **ODBC Name** – Select the required database from which the patient details to be retrieved.

Note: If the practice has more than one database, then all the databases will be listed in the Database field.

- **Connect**– After selecting the database, click on the **Connect** button. This will automatically populate all patients' whose **First Name** and/ or **Surname** with special characters and space.

Note: please allow some time for the process to search through the database, as the length of time this will take to complete is dependent on the database size.



Note: The selected records that do not currently comply with the new Medicare Name validation requirements will be highlighted in **Blue** colour.

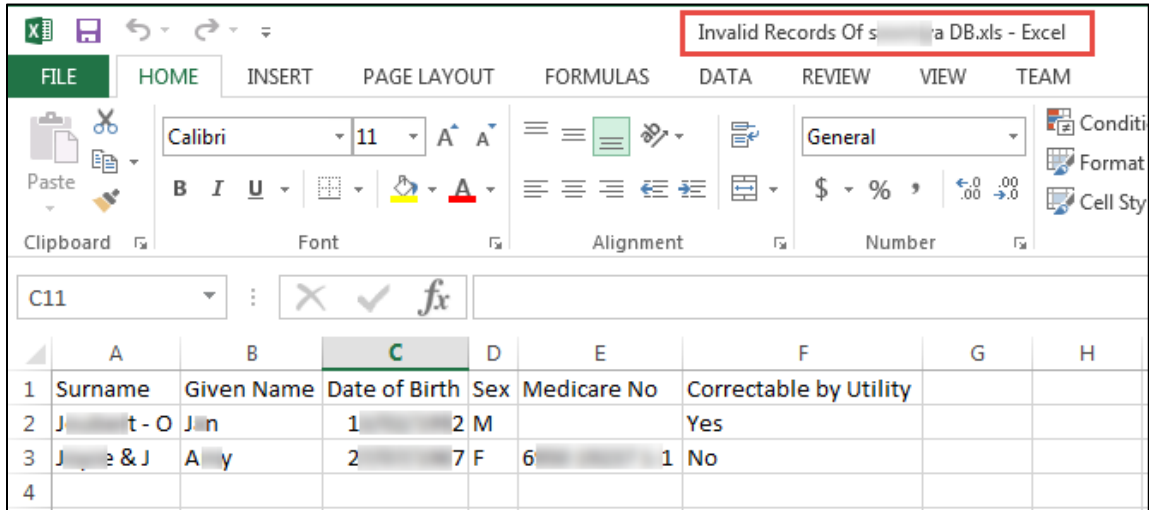
- **Update** – On clicking the **Update** button, all those patients' whose names have **spaces** before or after the permitted special character - '**Apostrophe**' or '**Hyphen**' will be removed automatically from the selected database. Any unnecessary space before or after the Surname and First name will also be autocorrected by the utility. The grid will be refreshed automatically by removing the particular patient record from the list.

Once updated, a pop-up message will be shown indicating the status of the update. A sample message is shown below:

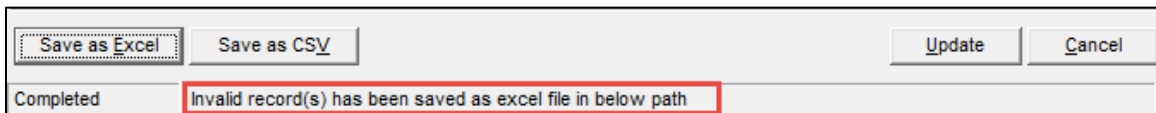


Click **OK** to continue.

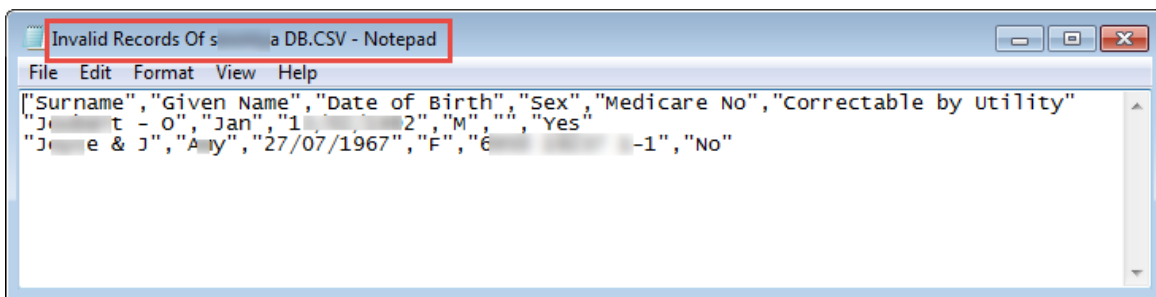
- **Save as Excel:** The **Export** function has been introduced in the utility so as to assist the user in exporting the list to either an Excel file or to a .csv file. By clicking on the '**Save as Excel**' option, the list that was populated will be exported and automatically opened in to an Excel file format. A sample Excel file is shown in the next screenshot:



Once exported, the utility will reflect the changes with a status message as below:

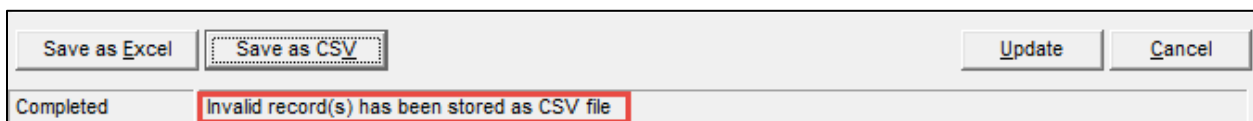


- **Save as .csv file:** Similarly, the list could also be exported as a .csv file by clicking on **'Save as CSV'** button. Clicking on the **'Save as CSV'** will automatically open the file as per the screen shown below:



If the user wishes to open the .csv file in Excel format later, they can do so open by using the **'Open With'** feature after saving the file.

Once exported, the utility will reflect the changes with a status message as per the sample screenshot shown below:



- **Cancel** – Click **Cancel** to abort the utility.
- **Invalid Data- grid view**: This lists out all the patients whose **First name** or **Surname** contain special characters and / or space. The grid view displays **Names** with special character(s), **Date of Birth**, **Sex**, The **Acceptable format** column describes the right format and also denotes whether the name is correctable by the utility itself.

Patient Name Validation Log file

A **Fix Invalid records utility log** file has also been created which will monitor the activities pertaining to Utility. This file is available in the folder ‘...**Utilities****PatientNameValidation.log**’. The user can view the past activities in the Log File, if they have run the utility multiple times.

An example of the log file is shown below:

```

Patient Name Validation.log - Notepad
File Edit Format View Help
13/08/2015 14:38:26 Loading ODBC name into drop down list
13/08/2015 14:38:26 Application ready to use
13/08/2015 14:38:31 Connecting to database:
13/08/2015 14:38:31 DB connection sucessful for given database. Database :
13/08/2015 14:38:31 Loading invalid patient into data grid.
13/08/2015 14:38:48 Invalid record(s) loaded successful.10482 record(s) found.
13/08/2015 14:40:56 update process started
13/08/2015 14:40:56 Entity 4 updated sucessful
13/08/2015 14:40:56 Entity 5 updated sucessful
13/08/2015 14:40:56 Entity 6 updated sucessful
13/08/2015 14:40:56 Entity 7 updated sucessful
13/08/2015 14:40:56 Entity 8 updated sucessful
13/08/2015 14:40:56 Entity 9 updated sucessful
    
```

Follow the above process to update the patient names in each of the databases so as to be compliant with the Medicare validation rules.

Should you require any assistance running the utility, please do not hesitate to contact the **Medtech Helpdesk** on Tel: **1300 362 333**, or Email: support@medtechglobal.com