



MANATŪ HAUORA

The Equipment and Modification Services Prioritisation Tool

Service Utilisation Reports

A Guide for EMS Assessors and Service Managers

Version 1.1

(August 2014)

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Introduction

This guide assumes that you are already familiar with the Prioritisation Tool. This guide covers only the purpose of, and how to access the Service Utilisation Reports. If you have any questions around any of the other aspects of using the Prioritisation Tool, please refer to the Getting Started Guide, available from the Resources section of the Prioritisation Tool.

This guide is primarily provided for EMS Assessors, however these reports are also available to Service Managers, with a login to the Prioritisation Tool. Terminology used within this guide refers to EMS Assessors but applies almost equally to Service Managers.

[If, as a Service Manager/Supervisor, you require a login to the Prioritisation Tool, please send an email to helpdesk@enigma.co.nz, with the reason that you require access. EMS Assessor access is via automatic feed from Enable NZ Assessor Online database]

Service Utilisation Reports – What Are They?

Equipment and Modification Services that are provided to your clients following submission of your service request have costs associated with them unless they have been supplied from refurbished and reissued stock held by the EMS Provider. The details of each piece of equipment or modification provided, including the cost, are held within the EMS Provider's system. This information is provided to the Prioritisation Tool on a quarterly basis and is referred to as your Service Utilisation (utilisation). This provides you with insight on your average utilisation, compared with the average utilisation of other EMS Assessors across the country who work in similar work places.

The EMS Provider will use these reports to monitor service demand and costs by individual EMS Assessor specific services (such as a Child Development Team) and may follow up with other individual EMS Assessors where their utilisation over the reporting period is significantly above the average of their peers and there is no clear explanation for this.

These reports can also be accessed by Service Managers and other interested people who supervise EMS Assessors or who monitor service costs and demand within their own DHB or specific service.

The costs can be grouped or filtered, to provide you with a more specific average utilisation comparison. This is described in more detail later in this guide.



Any reissued items, or items with an associated cost of less than \$50, are excluded from these reports.

Getting Started

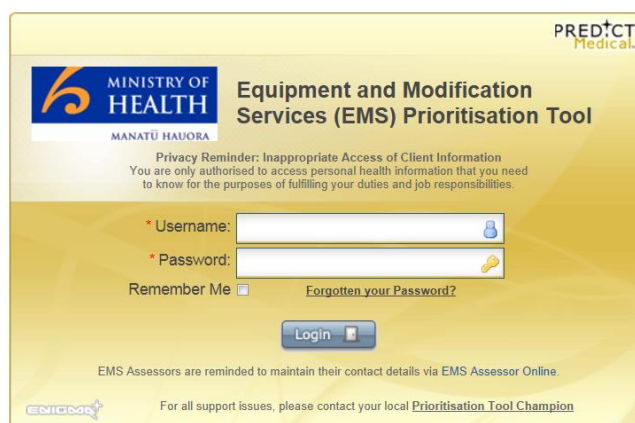
Logging in

In your internet browser, enter one of the following web addresses:

If you have a Connected Health connection, please use: <https://ch.ems.health.nz/>

If you do not have a Connected Health connection, please use: <https://secure.ems.health.nz>

The Connected Health URL should always be used when a Connected Health connection is available.



MINISTRY OF HEALTH
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Equipment and Modification Services (EMS) Prioritisation Tool

Privacy Reminder: Inappropriate Access of Client Information
You are only authorised to access personal health information that you need to know for the purposes of fulfilling your duties and job responsibilities.

* Username:

* Password:

Remember Me [Forgotten your Password?](#)

EMS Assessors are reminded to maintain their contact details via EMS Assessor Online.

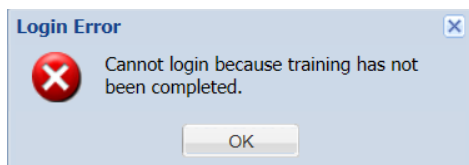
For all support issues, please contact your local [Prioritisation Tool Champion](#)

Enter your username and password and click **<Login>**.

If you are the only person using your computer, you can click the 'Remember Me' checkbox to remember your details.

Before being able to log into the Prioritisation Tool, it is a requirement that all EMS Assessors have completed the On-Line Training module (<http://learnonline.health.nz/login/index.php>). At the end of the on-line training session, your Assessor Code will be sent to the Prioritisation Tool to confirm completion of the training. This does not apply to those users who will access the Prioritisation Tool only for reporting purposes eg Service Managers.

If you have not completed this training, when you try to log into the Tool you will see the following error:



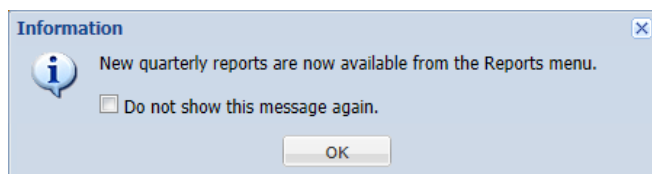
If you need help, the contact details for the Prioritisation Tool Champions can be found by clicking the **<Prioritisation Tool Champion>** link on the login screen.

Logging out

You can log out at any time by selecting the Options menu followed by **<Logout>**.

Service Utilisation Reports

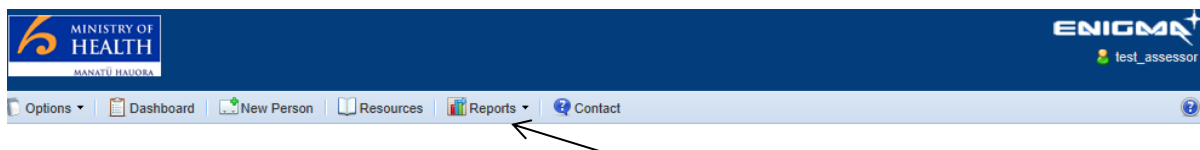
These reports will be updated on a quarterly basis. At the start of the reporting period, once the quarter's data has been uploaded, immediately upon logging into the Prioritisation Tool, you will be presented with a message advising you that these reports are available:



This message will appear every time you return to the Dashboard, until you click the box next to 'Do not show this message again'. If you click the 'Do not show this message again' box, this prompt will not appear until the following quarter, when it will appear again to advise you that the next quarter's reports are available.

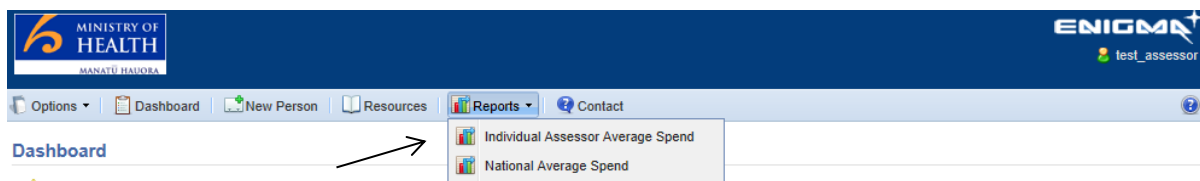
This message will not appear for Service Managers, who instead will receive an email notification that the reports are available, on a quarterly basis.

Once you have clicked <OK> to the above message, you can access the Service Utilisation Reports by selecting <Reports> at the top of the screen, on the menu bar.



To access the reports, click the drop down arrow on the Reports tab and select the report type you wish to run. This will display the list of reports available for you to use, according to your user role. As an EMS Assessor or Service Manager, you will have access to two reports:

- Individual Assessor Average Spend
- National Average Spend

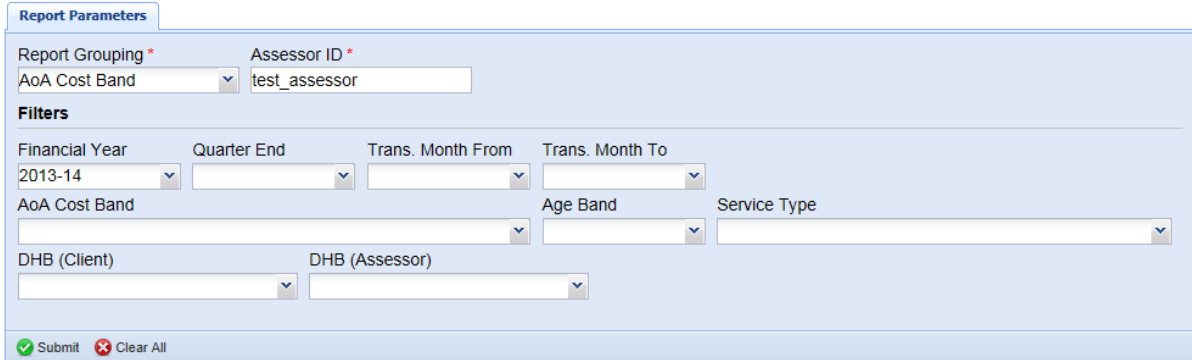


Click on the report you wish to run. You will then be required to enter reporting parameter information, the information required will be dependent on the type of report you are running. This is covered separately below.

Individual Assessor Average Spend

The Individual Average Spend Report shows *your* average utilisation, based on the parameters you specify. On selecting this report, you will be presented with the following reporting parameters to select:

Individual Assessor Average Spend Report



The screenshot shows a web form titled "Report Parameters" for the "Individual Assessor Average Spend Report". It includes the following fields:

- Report Grouping ***: A dropdown menu with "AoA Cost Band" selected.
- Assessor ID ***: A text input field containing "test_assessor".
- Filters**: A section containing several dropdown menus:
 - Financial Year**: "2013-14"
 - Quarter End**: empty
 - Trans. Month From**: empty
 - Trans. Month To**: empty
 - AoA Cost Band**: empty
 - Age Band**: empty
 - Service Type**: empty
 - DHB (Client)**: empty
 - DHB (Assessor)**: empty
- At the bottom, there are two buttons: "Submit" (with a green checkmark icon) and "Clear All" (with a red 'X' icon).

Your Assessor ID will pre-populate automatically, if applicable. If accessing this report as a Service Manager, you will need to know the Assessor Code for the EMS Assessor whose report you wish to view. Once all relevant data is filled in (see below), click <Submit>, which will run the report and open the report in a printable format.

All reports can be exported to Excel and can be printed if required, see Exporting to Excel.

Grouping the Report Data

The Report data can be grouped, and filtered, to enable you to get an accurate comparison of the data. You do this by making sure you have as a minimum, the Report Grouping and Assessor ID specified. These are both mandatory items so that report cannot be generated without these items present. In addition to the grouping, you can then apply additional filters to drill down into the specific averages. This is described under Filtering the Report Data below.

The Assessor ID, a mandatory field, will always default to your own Assessor ID.

The reports can be grouped based on five key criteria:

- **AoA Cost Band** – this shows your average utilisation broken down by Area of Accreditation. Only the Areas of Accreditation which you have requested services for will be shown. The National Average Spend is based on all EMS Assessor Utilisation in these specific areas.

Within these Areas of Accreditation some additional cost bands have been added to more clearly define average utilisation within an area. These cost bands are listed below.

CAT-1 (\$2,000 or less)

CAT-2 (\$2,001 or more)

HOUSING-1 (\$2,000 or less)

HOUSING-2 (\$2,001 to \$10,000)

HOUSING-3 (\$10,001 or more)

PSCHSM-1 (\$500 or less)

PSCHSM-2 (\$501 to \$5,000)

PSCHSM-3 (\$5,001 or more)

VEHICLE-1 (Vehicle Driving Assessment)

VEHICLE-2 (Vehicle Modification)

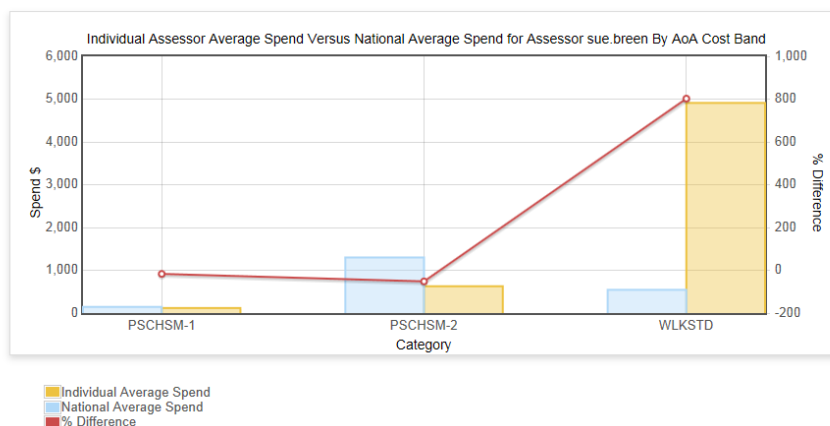
VEHICLE-3 (Vehicle Purchase)

WMPML-1 (\$1,000 or less)

WMPML-2 (\$1,001 to \$10,000)

WMPML-3 (\$10,001 or more)

AOA COST BAND	DESCRIPTION	INDIVIDUAL AVERAGE SPEND	NATIONAL AVERAGE SPEND	% DIFFERENCE
PSCHSM-1	Personal Care & Household Management (\$500 or less)	\$118.77	\$142.75	-16.8%
PSCHSM-2	Personal Care & Household Management (\$501 to \$5,000)	\$625.00	\$1,298.95	-51.9%
WLKSTD	Walking & Standing	\$4,910.00	\$544.07	802.5%



- **Age Range** – this shows your utilisation broken down by predefined age brackets, graph data is also available:

AGE BAND	INDIVIDUAL AVERAGE SPEND	NATIONAL AVERAGE SPEND	% DIFFERENCE
0-16years	\$4,910.00	\$1,272.37	285.9%
17-64 years	\$296.73	\$931.25	-68.1%
65-79 years	\$76.05	\$500.56	-84.8%
80 plus years	\$67.70	\$329.52	-79.5%

- **Service Type** – this shows your utilisation for your Primary Service Type and includes the national utilisation only for EMS Assessors within the same Service Type, graph data is also available. This report is based on the Primary Service Type associated with your user account at the time of running the report. If you have moved into a different service area since your earlier requests, these will show against your new Service Type. If you have placed Service Requests under a second Service Type, these will also report under your Primary Service Type. Graph data is also available:

SERVICE TYPE	INDIVIDUAL AVERAGE SPEND	NATIONAL AVERAGE SPEND	% DIFFERENCE
Community Health Service	\$791.35	\$549.65	44.0%

- **DHB of Client** – this shows your utilisation based on the DHB where your Client lives. If you deal with Clients across multi DHBs, you will see all DHBs, graph data is also available:

DHB (CLIENT)	INDIVIDUAL AVERAGE SPEND	NATIONAL AVERAGE SPEND	% DIFFERENCE
Auckland DHB	\$70.33	\$650.09	-89.2%
Northland DHB	\$213.97	\$783.48	-72.7%
Waitemata DHB	\$2,486.88	\$654.27	280.1%

- **DHB of Assessor** – this shows your utilisation based on the DHB where you work from. If you perform services for more than one DHB, they will all be listed, graph data is also available:

DHB (ASSESSOR)	INDIVIDUAL AVERAGE SPEND	NATIONAL AVERAGE SPEND	% DIFFERENCE
Auckland DHB	\$70.33	\$795.95	-91.2%
Northland DHB	\$213.97	\$749.94	-71.5%
Waitemata DHB	\$2,486.88	\$502.18	395.2%

Filtering the Report Data

You can specify different filters for these reports, to filter by dates and by the same criteria as specified within the grouping section. If you specify different reporting periods for these reports, the averages of both your individual average utilisation and the national average utilisation will be apportioned accordingly.

- **By financial year** – selecting this will give you the average of all utilisation across the financial year. Please bear in mind that the financial year may not be complete eg if you run the report in October for the financial year 2014-15, the output will include data only from July 2014 onwards. Running the report for the financial year 2013-14 will provide only data from February 2014 – June 2014 inclusive, as there is no earlier data than February 2014.

- By quarter – if you only want to view the report for a specified quarter
 - ⚠ The data will be available on a quarterly basis – until the whole quarter’s data is available, you will not be able to run the report on a partial quarter
- By a specific month – you can pick a specific month and only report on that month. As per the quarterly data, the monthly data will appear only once the complete quarter’s data is available eg until July, August and September data is available, you will not be able to run the report for July.
- By a date range – you can specify a start and end period if you want to run the report over a period not covered by the main filters

All reports can also be filtered by the five key criteria specified in the Grouping the Report Data section above.

Example:

I am an EMS Assessor approved in:

- Personal Care & Household Management (\$500 or less)
- Personal Care & Household Management (\$501 to \$5,000)
- Walking & Standing



I work in the Community Health Service.

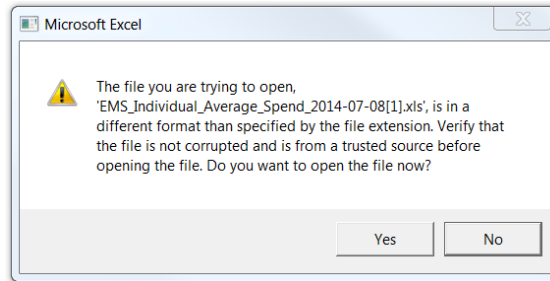
I would like to run a report showing my average utilisation by Area of Accreditation. I want to compare this with other EMS Assessors within the Community Health Service.

The report output below, grouped by Area of Accreditation and filtered by the Service Type “Community Health Service” shows the average utilisation of all EMS Assessors within Community Health, split across the specified Areas of Accreditation:

AOA COST BAND	DESCRIPTION	INDIVIDUAL AVERAGE SPEND	NATIONAL AVERAGE SPEND	% DIFFERENCE
PSCHSM-1	Personal Care & Household Management (\$500 or less)	\$118.77	\$135.00	-12.0%
PSCHSM-2	Personal Care & Household Management (\$501 to \$5,000)	\$625.00	\$625.00	0.0%
WLKSTD	Walking & Standing	\$4,910.00	\$1,360.67	260.9%

Exporting to Excel

All reports can be exported to Excel by clicking on the Excel icon   at the top of the report output. When the following message is displayed, simply click <Yes>:



Printing the Reports

All reports can be printed by clicking on the Print icon   at the top of the report output.

National Average Spend

The National Average Spend report is run in exactly the same way as the Individual Assessor Spend with one exception:

- There is no grouping by Assessor ID. The output provides only the national average utilisation, there is no comparison data by Assessor ID

National Average Spend Report

Report Parameters

Report Grouping *
AoA Cost Band

Filters

Financial Year: 2013-14
 Quarter End:
 Trans. Month From:
 Trans. Month To:
 AoA Cost Band:
 Age Band:
 Service Type:
 DHB (Client):
 DHB (Assessor):

Submit Clear All

AOA COST BAND	DESCRIPTION	NATIONAL AVERAGE SPEND
CAT-1	Communication Assistive Technology (\$2,000 or less)	\$336.02
CAT-2	Communication Assistive Technology (\$2,001 or more)	\$8,061.00
HAT	Hearing Assistive Technology	\$336.72
HOUSING-1	Housing Modifications (\$2,000 or less)	\$688.49
HOUSING-2	Housing Modifications (\$2,001 to \$10,000)	\$4,954.66
HOUSING-3	Housing Modifications (\$10,001 or more)	\$11,313.97
PSCHSM-1	Personal Care & Household Management (\$500 or less)	\$142.75
PSCHSM-2	Personal Care & Household Management (\$501 to \$5,000)	\$1,298.95
PSCHSM-3	Personal Care & Household Management (\$5,001 or more)	\$7,399.29
VAT	Vision Assistive Technology	\$556.52
VEHICLE-1	Vehicle Driving Assessment	\$350.00
VEHICLE-2	Vehicle Modification	\$6,937.77
VEHICLE-3	Vehicle Purchase	\$8,276.60
WLKSTD	Walking & Standing	\$544.07
WMPM-1	Wheeled Mobility & Postural Management (\$1,000 or less)	\$397.77
WMPM-2	Wheeled Mobility & Postural Management (\$1,001 to \$10,000)	\$2,855.91
WMPM-3	Wheeled Mobility & Postural Management (\$10,001 or more)	\$12,503.70
WMPMLYG	Wheeled Mobility & Postural Management (Lying)	\$1,053.85
GRAND TOTAL		\$665.50

For details on how to run, group and filter this report, please refer to the Individual Assessor Average Spend report.

Support

Support for the Prioritisation Tool is provided by a number of 'Champions' across the Regions. These 'Champions' can be found by clicking on the link on the login screen:

For all support issues, please contact your local [Prioritisation Tool Champion](#)