


Appendix

Ref: 2223-1919

Client: A KS

Bookmark*	Description of the document
A	HAT guidelines– ASH Conditions - Version 9.0 – 8 March 2021
B	HAT guidelines — Single Failure Points - Version 11.0 – 13 January 2023
C	HAT guidelines – Multiple Failure Points – Version 6.1 – 2 June 2021
D	Guidance for HAT when referring medicals to an MA and email correspondence
E	INZ guidelines for MAs dated 14 October 2022
F	IHS and Health standard operating procedures
*To find a relevant document, please select the 'bookmark' icon on the left side of the document - 	

ASH Conditions:

The following conditions are ASH even if more than one of them is noted on the medical. Single Failure Point and Multiple Failure Point outcomes can still be applied if any of the following conditions are noted on the same health case.

A	<p>Acne/Acne vulgaris whether or not on oral or topical medication Abdominoplasty (Tummy tuck) Abortion Acanthosis nigricans Adenoidectomy Adipose tissue (fat) Allergic rhinitis Allergies: Drug allergy, Skin allergies, Hay fever Alopecia including if on medication for hair loss (if sure this is related to hair loss treatment) Amblyopia Anaemia corrected Aorta – unfolding or tortuous aorta or sclerotic aorta for ≥50 years only Aortic calcification/Aortic arch Appendectomy/Appendicectomy Atrial septal defect, repaired with specialist letter attached Asthma well controlled e.g. Salbutamol (Ventolin) inhaler Atypical moles Azygous fissure/lobe</p>
B	<p>Back pain unless on narcotics, or associated with severe limitations Bartholin's cyst Bell's palsy Benign prostatic hyperplasia Bifid ribs Bilirubin light (treatment for new-borns with neonatal jaundice) Birthmarks Blepharoptosis of eyes Bone island Bony abnormality Breast fibroadenoma, Fibrocystic breast disease Breast implants Breast reduction Broken bones/old fractures/metal ware in limbs Bronchial wall thickening (mild) Bronchitis Bunions</p>
C	<p>Caesarean section Capillary telangiectasia Cardiac fat pads Cataract if visual acuity is normal and no other abnormal findings are noted Cauliflower ear/boxer's ear/wrestler's ear Cavities (teeth, dental, not in lungs) Celiac/Coeliac disease Cervical dysplasia Cervical fusion with no mobility problem Cervical polyp more than 1 year ago Cervical ribs Cervical sympathectomy Chilblains Chicken pox if not active Chlamydia, if treated Cholecystectomy/Gall bladder removal unless for cancer Cholelithiasis Chronic otitis media Circumcision Cleft palate repair, no further surgery planned Club foot surgery in infancy, no further surgery required, functioning/mobilising normally</p>

	<p>Cold Sore Colon polyps Colonoscopy more than 1 year ago Colposcopy (pap test) more than 1 year ago and if not associated with cervix cancer Concussion (no ongoing issues) Conjunctivitis (pink eye) Contraceptive oral medication or implant Cosmetic surgery Costochondral calcification Creatinine (Low) Cryotherapy for benign skin lesions Cystectomy (Ovarian cyst) Cystitis</p>
D	<p>Deafness in one ear only Dengue fever Dental disease Dermatitis including contact Deviated septum surgery Dextrocardia Diaphragm partial eventration Discectomy with no mobility issues Diverticulitis Dorsal spine osteophytosis Dyslexia only if no developmental delays Dysmenorrhea Dyspepsia</p>
E	<p>Ectopic pregnancy with/without salpingectomy (history only) Eczema requiring topical treatment only (skin creams, ointments) and not requiring oral treatment Elective sleeve gastrectomy Endometriosis Enlarged tonsils Epicondylectomy unless done for cancerous reasons Erb's palsy</p>
F	<p>Facial paralysis Factor V Leiden (Factor 5 Leiden) Fatty liver disease (non-alcoholic only) Febrile seizure Fenton's repair for episiotomy scars Fibroadenomas Fibroid uterus Fibroidectomy Fibroids Fibromyalgia Finger amputation secondary to work injury stating no concerns or ongoing issues. Foreign body in soft tissues e.g. bullet, shrapnel, etc. as long as in good health Fracture (Healed) Fungal skin infection (Tinea)</p>
G	<p>Gallbladder surgery Gastric bypass/Gastric Sleeve/Bariatric surgery Gastritis, Dyspepsia, Heartburn, H-pylori, Stomach ulcer (gastric) Genital herpes Geographic Tongue (Benign Migratory Glossitis) GERD/GORD (Gastro-oesophageal reflux disease) Gestational diabetes with previous pregnancy Gilbert's syndrome Gingivitis Glaucoma Goitre (benign thyroid enlargement) Gonorrhoea, if treated Gout controlled with medication e.g. allopurinol Graves' disease (well managed) Grommets (Tube insertions tympanic membranes right and left ears)</p>

H	<p>Harrington Rod Hashimoto's thyroiditis Haemorrhoidectomy Haemorrhoids Hair Loss Hair Transplantation Hayfever Heart burn Hepatitis A (history only) and juvenile hepatitis (if all tests are negative) Hernia – hiatus, inguinal, umbilical Herniorrhaphy (hernia repairs) Herpes of the eye Herpes Simplex Herpes zoster or shingles Hirsutism Hormone replacement therapy (HRT) Hydrocele – Varicocele Hypercalcaemia Hyperhidrosis (excessive sweating) (with or without medication) Hypoglycaemia – low blood sugar Hypospadias only if already corrected Hypotension Hypothyroidism (thyroid insufficiency) with or without medication e.g. thyroxine Hysterectomy unless for cancer (e.g. fibroids) Hysteromyoma</p>
I	<p>IBS (Irritable Bowel Syndrome) Illiterate, can't read for adults only (outside of school age) Incision and drainage of abscesses Infertility Ingrown toenail surgery Insomnia</p>
J	<p>Jaundice only if 10 years or less, or neonatal</p>
K	<p>Keloid scar Keratoconus Kidney infection if all else is normal Kidney, single with normal creatinine Knee arthroscopy Knee surgery and currently fully functional Kyphosis, mild</p>
L	<p>Laparoscopy Laser eye surgery unless complications Lipoma Liposculpture Lumbago Lumbar and thoracic pain with no mobility problem</p>
M	<p>Malaria more than 1 year ago Malassezia furfur (pityrosporum folliculitis) Mammary implants Mammoplasty (Breast Lift) Mastoiditis Meatal cyst Meniere's disease Menopause Migraines Miscarriage Molluscum contagiosum Mongolian birth spot Mononucleosis more than 1 year ago Multiple nevi Mumps (No ongoing issues) Musculoskeletal injections Myectomy if not cancer</p>

	Myomectomy Myringotomy tubes (Ear tubes)
N	Nasal operations or corrections
O	Occasional marijuana smoking when younger, not now Occasional mild pain killers Oophorectomy if not cancer Orchidoplasty ORIF (Open reduction internal fixation) Osteochondroma if benign Osteomyelitis (history only) Osteopenia Osteoporosis Osteosynthesis with normal Activities of Daily Living Otitis externa and Otitis media
P	Pancreatitis (history only) Parenchymal scarring Partial deafness Pectus excavatum/Carinatum Perforated ear drum Pericardial fat pad Piercing Pilonidal cyst Pityriasis versicolor Pneumothorax (history of) Polycystic ovarian disease Prostatic hypertrophy or BPH (Benign Prostatic Hypertrophy) / Enlarged prostate if smooth, no nodules Psoriasis of skin only, not psoriatic arthritis Pterygium including Surfer's eye Ptosis (Droopy eye) Pulmonary Embolism Pyelonephritis more than 2 years ago Pyloric stenosis
R	Refraction problem/error for eyes/ Astigmatism Removal of benign skin lesions such as skin tags and strawberry naevus Restless leg syndrome Rhinoplasty Rib abnormalities e.g. Cervical ribs, Bifid ribs, Congenital rib fusion and previous rib fractures
S	SAD (Seasonal Affective Disorder) Scarlet fever (history only) Scars – old burns/injury/laceration Sciatica Seborrhoeic dermatitis Septic arthritis more than 5 years ago Septoplasty Shirodkar stitches if it was the mother or with no complications Sickle cell trait (trait only – if disease, then refer) Sinus surgery Sinusitis Spina bifida ONLY on CXR and with no physical restrictions Splenectomy secondary to MVA/RTA/Injury(only if a result of these) Spondylitis/Spondylosis if mild and no associated problems with back Spontaneous vaginal delivery STD (Sexually Transmitted Disease), if treated / STI (Sexually Transmitted Infection), if treated Sterilisation Strabismus Surfers ear Syndactyl (Webbed) digits
T	Tattoos "Tenting" on A grading CXR Thyroid conditions other than cancer Thyroidectomy Tinea

	Tonsillectomy Tonsillitis Tortuous aorta Traumatic amputations (must not be disease related) Tubal Ligation Turbinectomy Typhoid fever more than 1 year ago
U	Ulcer – peptic, duodenal, gastric Uncoiling of the aorta Undescended testicle(s) in child, solitary testicle Urinary stress incontinence Uterine fibroids (Fibromyoma uteri) Uterine myomectomy
V	Varicose vein injections Vasectomy/Tubal ligation in the absence of heritable disorder Venous ulcers if not diabetic Vertebroplasty Vertigo Vitiligo
W	Warts Wisdom teeth (removal)
X	Xanthelasma

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Single Failure Points:

This guide is to assist Immigration Officers in determining cases in which there is ONLY ONE FAILURE on the medical.

The conditions highlighted in **dark blue** and **yellow** are used in conjunction with Multiple Failure Points. Please refer to the Multiple Failure Points guideline for details.

This guideline can be used for initial or subsequent health assessments. When the relevant AWC tests have been received and fall within SFP/MFP, the decision can be reapplied. If the previous AWC test results in relation to the SFP conditions are all normal, the case can be made ASH as no significant abnormality remains.

GMC			
Condition	Range	Recommended Outcome	Comments
Renal/Kidney stones (=Renal Calculi/Calculus)	No symptoms, stable and no haematuria	ASH with Conditions	Renal/Kidney stones - Please provide an updated report from a treating doctor regarding renal/kidney stones
		ASH for Residence	
BMI Normal range: 18≤BMI≤35	BMI≤14	Discuss with onsite MO ¹	
	15≤BMI≤17	ASH	If nil concern with client's photo
	36≤BMI≤50	ASH	
Eye	One blind eye but acceptable vision on the other eye	ASH	Acceptable Vision is ' 6/6, 6/9, 6/12, 6/18 or 6/24 ' regardless corrected or uncorrected. *if the intended work activity is truck driving or operating heavy machinery – Discuss with onsite MO
Hypertension (Normal Blood Pressure range is ≤ 140/90)	BP≤160/90 whether or not on hypertension medication ² (Two or less) *Choose the lowest value for Systolic and Diastolic from Initial BP and Repeat BP	ASH with Conditions	Hypertension/Raised BP - Please provide the following updates: repeat BP, medication list, creatinine, lipids, protein: Creatinine ratio, smoking history. Please include a reported ECG if the client is above the age of 40
		ASH for Residence	
Hyperlipidemia Dyslipidemia Hypercholesterolemia (=High cholesterol)	Whether or not on hyperlipidemia medication ³ (Two or less)	ASH with Conditions	Hyperlipidemia - Please provide lipids and medication update.
		ASH for Residence	
	If Lipids provided	Discuss with onsite MO	

¹ Note: you may refer the health case to the MA bucket if onsite MO is not available.

² Note: proceed with SFP/MFP even when there is any family history. Family history is more relevant to MA assessments.

³ Note: If unsure whether the medication is for the SFP conditions, discuss with onsite MO.

Critical Value	Requiring immediate onsite MA notification		
Condition	Range	Recommended Outcome	Comments
Failed Business rules	High Risk Physician	Refer to onsite MO	Report to onsite MO before referral
eGFR	<15	Refer to MA	Report to onsite MO before referral
FBC – HGB	<60 for both male and female	Refer to MA	Report to onsite MO before referral
FBC – WBC	>50	Refer to MA	Report to onsite MO before referral
FBC – PLT	<15	Refer to MA	Report to onsite MO before referral

eGFR Normal range: eGFR ≥60	15≤eGFR<60	Refer to MA
	eGFR<30	Please refer to FIR 10.0 to request Nephrologist report before referring the health case to MA
	eGFR<15	Refer to MA and Report onsite MO before referral

Hba1c			
Range	Diabetes YES/NO	Recommended Outcome	Comments
41 - 60 mmol/mol (5.9 - 7.6%) Normal range: Hba1c ≤40	YES *whether or not on Diabetes medication(s)	ASH with Conditions	Diabetes - this requires the following tests: repeat HbA1c, medication list, Smoking status and BP. Please include a reported ECG if the client is above the age of 40
		FIR for residence application	Please refer to FIR 10.0.
	NO	ASH with conditions	Elevated Hba1c - this requires the following tests: repeat Hba1c, medication list, smoking status and BP. Please include a reported ECG if the client is above the age of 40 Note: For ≤45 years old, Hba1c ≤45 can be ASH
≤40	YES *whether or not on Diabetes medication(s)	ASH for Residence	
		ASH with Conditions	Diabetes - this requires the following tests: repeat HbA1c, medication list, Smoking status and BP. Please include a reported ECG if the client is above the age of 40
>60	Don't Check	Refer to MA	
>80	Please refer to FIR 10.0 to request Endocrinologist report and then refer the health case to MA		

FBC				
Check HGB, WBC and PLT only (see Note for more details)				
Gender	Range		Recommended Outcome	
HGB	Male Normal range: 130-175	60≤HGB<110	Refer to MA	
		HGB≥110	ASH	
	Female Normal range: 115-155	60≤ HGB <90	Refer to MA	
		90≤HGB<115	≤50 years old	ASH
			>50 years old	Refer to MA
	HGB>156 and any age	ASH		
Pregnant Normal range: 100-145	90≤HGB<100 and ≤50 years old	ASH		
	HGB>146	ASH		
WBC Normal range: 4-11 / If pregnant: 5-14.5		Non-pregnant: ≤15 or ≥3	ASH	
		Pregnant: ≤16.5 or ≥3	ASH	
PLT Normal range: 150-400		Between 100 - 500	ASH	
Note	<p>If Ferritin is provided, FBC within SFP range with a low Ferritin can be ASH (Women ONLY). If Ferritin level is high, refer to MA (Both men and women).</p> <p>Please combine all three (HGB /WBC/ PLT) and treat this as one failure instead of 3. As long as the results for the FBC are within the SFP range, then ignore comments relating to 1) PCV, MCV, MCH, RBW, 2) Thalassaemia (unless major), Microcytosis 3) Women with iron deficiency/ Anaemia with or without iron supplements, 4) WBC differential (neutrophils, basophils, eosinophils, monocytes, eosinophils, and lymphocytes)</p>			

CXR			
SFP Condition	Range	Recommended Outcome	Comments
Scoliosis	≥11 years of age, no physical limitations mentioned and not severe scoliosis	ASH	
History of Contact with TB in work or family (within last 5 years)	Normal chest x-ray	ASH with Conditions	History of Contact with TB - Please provide repeat CXR.
		ASH for Residence	*Repeat CXR is required after 6 months for the applicant's next visa application. If the repeat CXR is normal - ASH
Vascular shadow/density noted in either hilum of the lungs	A grading	ASH	
Imaging plate artefact	A grading	ASH	
Nipple shadows	A grading and radiologist clearly stated they are nipple shadows	ASH	

Multiple Failure Points:

This guide is to assist Immigration Officers in determining cases in which there are TWO or MORE failures on the medical. The conditions highlighted in **dark blue** and **yellow** on SFP and FIR guidelines are used in conjunction with Multiple Failure Points. This guideline can be used for initial or subsequent health assessments. Please apply the Recommended Outcome and Comments [Age limits and Future conditions] from the SFP and FIR guidelines when applying MFP.

Codes	Combinations
MA05-M2 (example: MA05-M2 = FBC + Hba1c)	<p>M2 combines 2 failure points where any ONE of the 8 conditions from the SFP or FIR guidelines get combined with any ONE of the other SFP conditions; even the ones not listed here. For over 40, please refer to CVD Risk before proceeding.</p> <ol style="list-style-type: none"> 1. BMI 2. FBC 3. Eye 4. Kidney Stones 5. Hep C 6. Murmur 7. CXR 8. Syphilis
MA05-M3 (example MA05- M3 = BMI + FBC + Hba1c)	<p>M3 has a specific list of 3 conditions that can be combined together. For over 40, please refer to CVD Risk before proceeding.</p> <ol style="list-style-type: none"> 1. BMI + FBC + Hba1c 2. BMI + FBC + HTN 3. FBC + BMI + Eye 4. MA05-M2 + CXR
<p>Calculate CVD Risk (Age: Over 40)</p> <p>Combining two or more of:</p> <ul style="list-style-type: none"> ➤ BMI ➤ HTN ➤ Hba1c (≥50 mmol/mol) <p>Request: “Cardiologists Report” from the Dropdown</p>	<p>A CVD risk assessment is required for applicants who are over 40 years old and have a combination of 2 or more of these conditions: BMI/HTN/Hba1c.</p> <p>Request a Cardiologists report: The applicant has [high BMI/HTN/elevated HbA1c (delete as appropriate)]. This requires the following information from the applicant’s treating physician: A reported ECG, smoking history, lipids, family history of heart disease, Protein:creatinine ratio and their cardiovascular risk assessment using the qRISK tool: https://qrisk.org/three/. If the CVD risk is over 10%, then the applicant would need to be reviewed by a cardiologist.</p> <p>HAT: Once you have the CVD risk, 10% and over can be referred to an MA. Cases with less than 10% CVD risk can either be discussed with onsite MA or finalised:</p> <ul style="list-style-type: none"> • TEMP – AWC for the CVD risk [turn the above requirement to conditional info and include repeats of the tests you normally make AWC] • RESI – ASH <p>If GP has provided everything in the further requirement but not the CVD risk then please calculate it yourself.</p>
MA05-FIR (MA05-FIR = HTN + Hba1c) Age: Over 40 Request: “Specialist Report” from the Dropdown	<p>Request a Specialist report: The applicant has Hypertension and elevated HbA1c. This requires the following tests: microalbumin:creatinine ratio, smoking history, lipids, repeat blood pressure measurements, medication list and reported ECG.</p> <p>HbA1C range must be between 40-49mmol/mol to request a FIR Please refer the case once you have this information. Applicants under 40 can be referred to the MA without this FIR.</p>

Note: Please only record the **CVD risk** and **MA05-FIR** health cases under the “MFP Record 2021” spreadsheet in the HAT folder and include the codes for these in your initial assessment notes.

From: [Arpandeeep Kaur](#)
To: [*Immigration - BVO - NaDO - HAT](#)
Cc: [Cleo Zhang](#); [Bobby Xu](#); [Seini Petelo](#)
Subject: FW: Immigration Instructions - \$41k to \$81k - HAT approach [IN-CONFIDENCE]
Date: Monday, 27 February 2023 5:30:00 pm
Attachments: [image001.jpg](#)
[Immigration Instructions - \\$41k to \\$81k - HAT approach.pdf](#)
[image002.png](#)

Hi team,

Just recently came across NOT ASH cases for Residence where note to MA is missing regarding threshold. If you are aware of this, you may ignore to read this email.

If you are not aware or are not following the process, please refer to the below 2 emails from Natalie. Familiarize yourself and if you have any questions, please feel free to ask.

Kind regards,

Arpandeeep Kaur

Senior Immigration Officer (HAT)

National Documentation Office

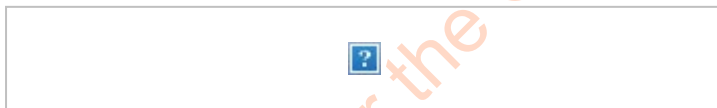
Border and Visa Operations, Immigration New Zealand

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From: Natalie Yu <xxxxxxx.xx@xxxx.xxxx.xx>

Sent: Monday, 5 September 2022 12:18 PM

To: *Immigration - BVO - NaDO - HAT <*Immigration-BorderVisaOperations-NaDO-xxx@xxxx.xxxx.xx>

Cc: Shadiya Shaleen <xxxxxxx.xxxxxx@xxxx.xxxx.xx>

Subject: RE: Immigration Instructions - \$41k to \$81k - HAT approach [IN-CONFIDENCE]

Hi Team,

Please see the amendment as below for scenario 2:

Scenario 2:

For RV 21 health case (ADEPT)

- Please note that there are cases where the client has no live RV 21 resident visa application in AMS but ADEPT showing "Preparing Application", please only put the note

of “PRE- threshold change” when referring the case to the MA).

The reason for changing it to “PRE-threshold change” is because the application for the RV 21 visa already closed on 31 July 2022!. Thank you Ganga for correcting me.

Regards

Natalie Yu
SENIOR IMMIGRATION OFFICER

Health Assessment Team
Border and Visa Operations, Immigration New Zealand
Ministry of Business, Innovation & Employment

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From: Natalie Yu
Sent: Monday, 5 September 2022 11:34 am
To: *Immigration - BVO - NaDO - HAT <Immigration-BorderVisaOperations-NaDO-xxx@xxxx.xxxx.xx>
Cc: Shadiya Shaleen <xxxxxxxx.xxxxxxxx@xxxx.xxxx.xx>
Subject: FW: Immigration Instructions - \$41k to \$81k - HAT approach [IN-CONFIDENCE]

Hi Team,

From today, when you are referring the health case to the MA under the **residence guidelines**, please make sure that the date of visa submission (Date accepted in AMS) is detailed in the referral.

We have been asked by the MA's to add the words Pre or Post to the “HAT Notes to MA” for the \$41000 threshold change as below. Therefore, please provide the correct information before referring the health case to the MA. Please see different scenarios as below:

Scenario 1:

When there is live visa application in AMS and the health case needs to be referred under the residence guidelines:

- Date of visa submission 12/8/22 (**PRE**- threshold change) or
- Date of submission 20/8/22 (**POST**-threshold change).

Scenario 2:

For RV 21 health case (ADEPT)

- Please note that there are cases where the client has no live RV 21 resident visa application in AMS but ADEPT showing “Preparing Application”, please only put the note of “Post- threshold change” when referring the case to the MA).

Scenario 3:

When there is no live visa application in AMS but the health case needs to be referred under the residence guidelines

- Please put the case of hold with the note of “SO/Processing IO- Please update identifiers, add visa application details when a visa is lodged and release the health case from HOLD”.

I have also updated the NOT ASH templates as below. Please only use the sentence highlighted in yellow when you are finalising the final NOT ASH for Residence, when the NOT ASH reason involves the \$41k threshold as below and the application was submitted prior to the threshold change.

- ACUTE - Acute medical condition(s) likely to impose significant costs, in excess of NZD \$41,000 within 5 years
- CHRONIC - Chronic recurring medical condition(s) likely to impose significant costs in excess of NZ\$41,000 over the predicted course of the condition(s)

i) Not ASH for General Guidelines

IHS note:

ASSESSMENT

GMC + CXR referred to MA and assessed

Client history has been reviewed

HEALTH DECISION: NOT ASH for Temporary/Residence (final)

IHS/ eMedical reference NZER: N000000000:

MA's reason: copy MA's reason

MA's comment: copy MA's comment

Disputing information received and reviewed by the MA – Not ASH reason has been changed, therefore this NOT ASH will be considered as the first NOT ASH.

Processing IO: Application submitted pre-threshold change, MA considered the applicant's medical condition(s) likely to impose significant costs between \$41k and 81k.

ii) Not ASH for Limited Guidelines

IHS note:

ASSESSMENT

LMC + CXR referred to MA and assessed

Client history has been reviewed

HEALTH DECISION: NOT ASH for Temporary/Residence under LIMITED guidelines
(final)

IHS/ eMedical reference NZER: N000000000

MA's reason: copy MA's reason

MA's comment: copy MA's comment

Disputing information received and reviewed by the MA – Not ASH reason has been changed, therefore this NOT ASH will be considered as the first NOT ASH.

Processing IO: Application submitted pre-threshold change, MA considered the applicant's medical condition(s) likely to impose significant costs between \$41k and 81k.

Regards

Natalie Yu
SENIOR IMMIGRATION OFFICER

Health Assessment Team
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From: Anna Morton <xxxx.xxxxxx@xxxx.xxxx.xx>

Sent: Monday, 5 September 2022 11:01 am

To: *Immigration - BVO - NaDO - HAT <Immigration-BorderVisaOperations-NaDO-xxx@xxxx.xxxx.xx>

Cc: Martha Pena <xxxxxx.xxxxxx@xxxx.xxxx.xx>; Aman Kalsi <xxxxxxxx.xxxxxx@xxxx.xxxx.xx>; Janet de Lira <xxxxxx.xxxxxx@xxxx.xxxx.xx>

Subject: Immigration Instructions - \$41k to \$81k - HAT approach [IN-CONFIDENCE]

Good Morning Team

The Minister has signed off on this change, so the attached process can now be implemented.

Natalie is updating our IHS template notes and will provide those shortly.

Kind Regards

Anna

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Guidance for HAT when referring medicals to an MA post significant-cost threshold update

Points to note

- Residence applicants that have submitted an application before the change takes effect will continue to be assessed under the instructions in place at the time the application was submitted – this means the \$41,000 threshold still applies to these cases.
- Where a health case for an application submitted prior to the change has an outcome of not ASH due to costs being above the threshold, IO's need to be aware if the health costs these applicants are likely to impose will fall between \$41,000 and \$81,000 as this should be a consideration for them when completing a medical waiver assessment.

Requested approach from HAT

- From Monday 5 September 2022 when HAT complete a general medical referral to an MA for residence please ensure the date the application was submitted is detailed in the referral.
- Once the threshold change comes into effect MA's will be able to select from the following options when determining an applicant is not ASH for cost reasons:
 - ACUTE - Acute medical condition(s) likely to impose significant costs, in excess of NZD \$41,000 within 5 years
 - CHRONIC - Chronic recurring medical condition(s) likely to impose significant costs in excess of NZ\$41,000 over the predicted course of the condition(s)
 - ACUTE - Acute medical condition(s) likely to impose significant costs, in excess of NZD \$81,000 within 5 years
 - CHRONIC - Chronic recurring medical condition(s) likely to impose significant costs in excess of NZD \$81,000 over the predicted course of the condition(s)
- For applications submitted pre-threshold change if an MA selects one of the \$41,000 options above this indicates that they consider the cost to be between \$41,000 and \$81,000. In these situations we request that HAT make clear in the final not ASH decision notes in IHS that it is due to a condition costing between \$41,000 and \$81,000. IO's can then use that information when considering a waiver.
- For applications submitted after the change comes into effect MA's should only be selecting the \$81,000 option.

Immigration New Zealand Guidelines for Medical Assessors

October 2022

Information about these guidelines

This document is for intending and new Medical Assessors to help them understand their role and responsibilities, and how their work fits into the immigration health assessment process.

These guidelines:

- describe the role of a Medical Assessor
- provide an overview of the medical assessment process
- offer information about documenting opinions
- list specific medical conditions and situations where guidance is available, and
- include a list of useful resources to support the work of Medical Assessors.

If you have any questions or concerns about the information in these guidelines, contact INZ-XXXXXXXXXXXX@.XXXX.XX.

Released under the Official Information Act 1982

Contents

Information about these guidelines	1
Immigration New Zealand (INZ) health instructions.....	3
How INZ collects health information	3
Glossary.....	3
The Medical Assessor’s role.....	4
Support for Medical Assessors.....	4
INZ support	4
Respiratory Physicians	5
Panel Physicians	5
Visa applicants who must undergo a medical examination	5
Meeting the criteria for an acceptable standard of health	5
Medical certificates.....	7
The medical assessment process.....	8
Outcomes from medical assessments	8
Guidelines for documenting opinions.....	10
General advice about opinions	10
Writing ASH opinions	11
Writing AWC opinions.....	11
Recording a deferral.....	11
Writing NOT ASH opinions.....	11
Requesting further information.....	12
If an applicant disputes a Medical Assessor’s opinion.....	12
Guidelines for specific medical conditions	13
Requesting the guidelines.....	13
Online references.....	14
INZ guides and forms	14
INZ website	14
Other health and education references.....	14
Online medical tools and calculators.....	14

Immigration New Zealand (INZ) health instructions

The New Zealand government requires that applicants for temporary entry to, and residence in New Zealand must have an Acceptable Standard of Health (ASH) before they can be granted a visa. In some exceptional cases this requirement can be waived.

The objective of the immigration health instructions is to:

- protect public health in New Zealand
- ensure that people entering New Zealand do not impose excessive costs or demands on New Zealand's health and special education services, and
- where applicable, ensure that applicants can fulfil the purpose of the visa they apply for.

Medical Assessors use these objectives as the basis for an opinion about whether or not an applicant is likely to meet ASH requirements.

How INZ collects health information

Doctors who undertake Immigration Medical Examinations (IMEs) on behalf of INZ, known as Panel Physicians, submit information using eMedical, an online platform managed by the Australian Department of Home Affairs on INZ's behalf.

Information from eMedical is transferred to the Immigration Health System (IHS). It is then used by Immigration Officers (IOs) and Medical Assessors to review medical information, and record outcomes and opinions.

Glossary

Applicant – A person who applies to enter or remain in New Zealand as a permanent resident (including refugees, who may also be referred to as candidates) or as a temporary entrant (including tourists, students or temporary workers).

Candidate – A person mandated as a refugee by the UNHCR (the United Nations refugee agency) who has been selected as a candidate for New Zealand's Refugee Quota Programme.

Conditions – Physical, mental, emotional or intellectual disorders of the applicant that are identified by the applicant or by the Panel Physician from the history, examination and subsequent tests.

High cost conditions – Those conditions that exceed the high cost threshold of \$81,000 over a five-year period in the case of an acute condition, or over the likely course of the condition if it is chronic. The A4.10.1 list of high cost conditions in the INZ Operational Manual lists those conditions that are known to cost more than the high cost threshold, so have been deemed to be high cost medical conditions already.

High demand conditions – Those conditions that require services within New Zealand, the demand for which is currently unmet. The availability of health services across the whole of New Zealand is considered, not just the availability within a particular locality.

Immigration instructions – These consist of:

- immigration policy objectives
- any rules or criteria for determining the eligibility of a person for the grant of a visa, and
- any other relevant information that should be considered in assessing a person's eligibility for a visa.

Immigration instructions are certified by the Minister of Immigration under section 22 of the Immigration Act 2009. They are published in the [INZ Operational Manual](#).

Immigration Medical Examination (IME) – The medical examination undertaken by a Panel Physician for New Zealand immigration purposes that includes:

- the functional inquiry for present, past and family history
- the findings on physical and mental examination, and
- the results of all relevant radiology, laboratory and diagnostic tests including further specialist reports.

Medical waiver – see page [TBC]

Ongoing Resource Scheme (ORS) – see page [TBC]

Panel Physician – see page [TBC]

The Medical Assessor's role

Based on the information provided by an applicant, a Medical Assessor provides an opinion to INZ as to whether an applicant is likely to meet the ASH requirements.

Medical Assessors do not provide advice concerning the decline or approval of visa applications.

A Medical Assessor applies appropriate medical, ethical and professional standards during their considerations. Before they arrive at an opinion, they may:

- request additional tests and investigations to further understand an applicant's state of health
- investigate the cost to, and demands on, New Zealand's health and education systems of an applicant's health condition.

The Medical Assessor may also provide advice on an applicant's health, such as a prognosis or the economic impact. This information is used by IOs if an applicant is eligible to be considered for the grant of a medical waiver – that is, in some cases an applicant may be given a visa even though they do not meet ASH requirements.

Support for Medical Assessors

INZ staff and external specialists support the successful management of the IHS and the work of those who play a role in delivering it.

INZ support

Within INZ there are several teams responsible for the medical information submitted by visa applicants. They support Medical Assessors in various ways.

The Immigration Health Team (IHT) is responsible for the overall medical assessment process – including management of Medical Assessors and the Panel Physician network. They also provide health insights to other business units within INZ, and have a working relationship with their equivalent departments in Australia, Canada, the USA and UK through a group called the M5.

The Chief Medical Officer (CMO) for INZ, sits alongside the IHT in the Enablement Branch. The CMO is supported by a Medical Officer (MO) who works in the IHT, and their roles include:

- assisting with the supervision, education and training of Panel Physicians and Medical Assessors

- providing advice about complex cases
- supporting and advising the Health Assessment Team Immigration Officers (HAT IOs).

The HAT IOs are a team of officers who triage any IMEs that raise a concern. If they need expert help to resolve that concern they refer the IME to a Medical Assessor and then use the Medical Assessor's opinion to help them decide the health outcome for the applicant.

Respiratory Physicians

INZ contracts New Zealand-based respiratory physicians (INZ RPs) to provide specialist opinions where abnormalities in chest x-rays require specialist advice. This includes providing an opinion where a Medical Assessor has referred the chest x-ray to an RP because they suspect, or cannot exclude, active Tuberculosis (TB).

If a Medical Assessor has proof of or suspects Multidrug-Resistant TB (MDR-TB) or Extensively Drug-Resistant TB (XDR-TB) they must get the opinion of an INZ RP.

Panel Physicians

INZ accredits physicians and clinics in New Zealand and other countries to carry out IMEs for visa applicants. If a Medical Assessor requests further information about an applicant's health this is, in most cases, provided by a Panel Physician.

INZ regularly:

- audits the clinics to ensure they are following the correct processes
- provides education sessions for physicians, nursing and administration staff.

Panel Physicians and clinics follow instructions provided by INZ.

[New Zealand Immigration Panel Member Instructions \(INZ 1216\)](#)

Visa applicants who must undergo a medical examination

Visa applicants who apply for a temporary entry or resident visa must undergo a medical examination and provide one or more medical certificates depending on the visa they are applying for and how long they plan to stay in New Zealand. Exceptions to this can include applicants who have a visa to come to New Zealand for specific medical treatment, and most people visiting New Zealand for less than six months.

Temporary entry visas include visitor, work and student visas. Many temporary entry visa holders can apply to stay in New Zealand for up to three years.

Resident visas include skilled migrant, family, refugee and business visas. Holders of resident visas can:

- stay in New Zealand indefinitely
- study and work here
- travel in and out of the country, and
- use New Zealand's subsidised health services.

Meeting the criteria for an acceptable standard of health

Temporary entry visas

For temporary entry visas, an applicant will fail to meet ASH requirements if they are:

- likely to be a danger to New Zealand's public health

- unable to fulfil the purpose or conditions of the visa they are applying for, such as work or study
- likely to impose significant costs and demands on New Zealand's publicly funded health services during their stay
- applying for a student visa, are under 21 years of age and likely to qualify for Ongoing Resourcing Scheme (ORS) funding through the Ministry of Education.

"Significant costs and demands" have not been precisely defined but usually imply an amount in excess of the average amount per person of the annual vote health budget. For example, if the vote health budget for 2022 is \$24 billion and the New Zealand population is 5.1 million, then the average vote health amount per person is \$4705.

Consideration of whether a temporary entry applicant meets ASH requirements, or not, largely depends on their intended length of stay and purpose of their entry. The probability of an applicant's need for any of the following is taken into account:

- hospitalisation
- residential care
- high cost pharmaceuticals, or
- high cost services, including disability services or specialist services such as surgery or high-cost medical interventions.

Resident visas

For resident visas, an applicant will fail to meet ASH requirements if they:

- are likely to be a danger to New Zealand's public health
- are unable to undertake the work that is the basis for their visa application or a requirement of the visa they are applying for
- are likely to impose significant costs or demands on New Zealand's health services because there is a relatively high probability that their:
 - acute medical condition will require health services costing in excess of NZ\$81,000 within a period of five years after the assessment against the health requirements is made, or
 - recurring chronic medical condition over the course of the condition will require health services costing in excess of NZ\$81,000, or
 - medical condition will require publicly funded health services for which the current demand in New Zealand is not being met
- are likely to impose significant costs or demands on New Zealand's special education services – in this case the Ministry of Education will have advised that the applicant's physical, intellectual, sensory or behavioural condition, or group of conditions would entitle them to Ongoing Resourcing Scheme (ORS) funding
- have one or more conditions listed in A4.10.1 of INZ's Operational Manual which are considered to impose significant costs and demands on New Zealand's health or education services.

[Operational Manual – A4.10](#)

Criteria for a Limited Medical Certificate (LMC)

Some temporary entry and resident visa applicants only need to provide a LMC. This screens only for the conditions which INZ is unable to grant a medical waiver for. To meet ASH requirements for a LMC none of the following five conditions can apply to the applicant.

- They require dialysis treatment or, in the opinion of a Medical Assessor, will require it within five years of the date of the medical assessment.
- They have severe haemophilia.
- They have a physical, intellectual, cognitive or sensory incapacity that requires full-time care, including care in the community.
- They currently have any form of TB or have not completed full treatment for TB as outlined in the Guidelines for TB control in New Zealand.
- They have a history, that is, diagnostic findings or treatment for MDR-TB or XDR-TB – unless they have been cleared by a New Zealand-registered RP, an infectious diseases specialist or as specified in the *Guidelines for TB Control in New Zealand*.

[Guidelines for Tuberculosis Control in New Zealand, 2019 – Ministry of Health\](#)

Medical certificates

Within Immigration Instructions, IMEs are referred to as medical certificates. The paper-based versions are occasionally used in countries where there are no Panel Physicians with access to eMedical. They have an IME equivalent in eMedical which is where INZ receives nearly all medical information. The most common ones are noted in the table below. The IMEs tend to be referred to colloquially by the abbreviation of their initials – for example, GMC for General Medical Certificate.

Paper-based medical certificates	eMedical IMEs
General Medical Certificate (INZ 1007) – GMC	501 Medical examination
Chest X-ray Certificate (INZ 1096) – CXR	502 Chest X-ray examination
Limited Medical Certificate (INZ 1201) – LMC	512 Medical examination

The type of visa an applicant applies for determines which certificates or IMEs they must submit.

Applicants do not need to provide a CXR if they are under the age of 11 or pregnant. Because there is a small risk to the foetus from radiation exposure, INZ’s recommendation is that pregnant women should not have a chest X-ray. If they decide to have a chest X-ray they must submit a written consent with the CXR.

The INZ website carries up-to-date information about which certificates applicants must provide.

[Who needs a chest x-ray or medical examination](#)

Duration and validity of medical certificates

A CXR, GMC and LMC are usually valid for 3 years. During this time they can be used for a medical assessment for any relevant visa application.

For certificates to remain valid:

- INZ must receive a visa application within 3 months of the certificates having first been submitted, and
- previously submitted certificates must not have resulted in an outcome of NOT ASH.

Information on medical certificates

A GMC contains the following information:

- a full medical history
- a full medical examination
- urinalysis, and

- blood tests, including a full blood count and tests for Creatinine, HBA1c, HIV, Hepatitis B and C, and syphilis.

An LMC contains the following information:

- medical history focusing on the conditions for which a medical waiver cannot be granted
- medical examination focusing on the conditions for which a medical waiver cannot be granted
- blood tests, including a full blood count and a test for Creatinine.

Full information about the tests that Panel Physicians must complete before they submit medical certificates is documented in the Panel Member Instructions.

[Panel Member Instructions \(INZ1216\)](#)

The medical assessment process

This high-level view of the process for making an assessment may vary depending on the visa an applicant applies for and the information they provide.

1. A Panel Physician uses eMedical to submit an IME to INZ on behalf of a visa applicant.
2. A HAT IO reviews the IME in IHS. They refer the IME to the Medical Assessor if:
 - the Panel Physician notes significant or abnormal findings in the IME
 - the HAT IO requires advice concerning findings in the IME, or
 - an applicant disputes the outcome of a previous assessment and provides information from a medical professional to support their case.
3. The Medical Assessor considers all the information provided.
4. If the Medical Assessor doesn't have sufficient information to provide an opinion, they ask the HAT IO to request more information from the applicant. This is called a Further Information Request (FIR).
5. Applicants usually have 2 weeks to provide this information. They contact a Panel Physician who submits the information to INZ using eMedical.
6. If the Medical Assessor is satisfied they now have all the information they need, they enter their opinion in IHS.
7. The HAT IO, informed by the Medical Assessor's opinion, makes a decision as to whether the applicant meets ASH requirements or not. They enter their decision into IHS.

Outcomes from medical assessments

When a Medical Assessor completes their assessment they categorise their opinion as follows.

Outcomes for temporary visa applications

For temporary visa applications, if the Medical Assessor has all the information they need, they can provide an opinion that the applicant is:

- likely ASH – the applicant has an acceptable standard of health
- likely AWC (ASH with conditions) – an applicant has an acceptable standard of health for their current visa application, but they must submit further information when they apply for their next visa
- likely NOT ASH – the applicant fails to meet the standards for an acceptable standard of health. The medical assessor must specify which Immigration Instructions apply to the applicant – for example, the applicant is likely to impose significant costs or demands on health services. There may be more than one reason applicable, and if so, each reason should be recorded separately. A visa is unlikely to be granted to the applicant unless the IO

assessing their visa application decides they qualify for a medical waiver, or that an exception to immigration instructions is justified.

If the Medical Assessor needs further information before they can form an opinion, they record a FIR.

Outcomes for residence visa applications

For resident visa applications, the Medical Assessor may:

- record a FIR – the Medical Assessor needs further information before they can form an opinion
- record a 3 month deferral – the applicant has a medical condition that is treatable within 3 months, and the Medical Assessor needs to see results of further tests or reports before they can form an opinion
- record a 6 month deferral - the applicant has TB and is undergoing treatment for TB, and the Medical Assessor needs to see further reports before they can form an opinion.

If the Medical Assessor has all the information they need, they can provide an opinion that the applicant is:

- likely ASH – the applicant has an acceptable standard of health, or
- likely NOT ASH – the applicant fails to meet the standards for an acceptable standard of health. In their opinion, the medical assessor must specify which Immigration Instructions apply to the applicant – for example, the applicant has a condition included on the A4.10.1 list of high cost conditions. There may be more than one reason applicable, and if so, each reason should be recorded separately. A visa is unlikely to be granted to the applicant unless the IO assessing their visa application decides they qualify for a medical waiver.

Outcomes for LMCs (residence or temporary visas)

The Medical Assessor may:

- record a FIR – the Medical Assessor needs further information before they can form an opinion
- record a deferral for up to 6 months – the applicant currently has any form of TB, or a history of MDR-TB or XDR-TB, and requires treatment and clearance from an INZ RP.

If the Medical Assessor has all the information they need, they can provide an opinion that the applicant is:

- likely ASH – the applicant has an acceptable standard of health, or
- likely NOT ASH – the applicant fails to meet the standards for an acceptable standard of health.

If an applicant is likely NOT ASH, a Medical Assessor must provide an opinion on the applicant's medical condition and specify:

- which Immigration Instructions apply to the applicant – for example, the applicant has a condition included on the A4.10.1 list of high cost conditions. There may be more than one reason applicable, and if so, each reason should be recorded separately, and
- a further opinion on which of the conditions screened for on the LMC apply to the applicant – that is:
 - They require dialysis treatment or, in the opinion of a Medical Assessor, will require it within five years of the date of the medical assessment.
 - They have severe haemophilia.

- They have a physical, intellectual, cognitive or sensory incapacity that requires full-time care, including care in the community.
- They currently have any form of TB or have not completed full treatment for TB as outlined in the Guidelines for TB control in New Zealand.
- They have a history, that is, diagnostic findings or treatment for MDR-TB or XDR-TB – unless they have been cleared by a New Zealand-registered RP, an infectious diseases specialist or as specified in the *Guidelines for TB Control in New Zealand*.

Guidelines for documenting opinions

A Medical Assessor's opinion is based on an appraisal of the medical information submitted by the visa applicant. This includes medical certificates – CXR, GMC or LMC – and other supporting information provided by the applicant or requested by the Medical Assessor, such as reports, tests, investigations, opinions from specialists and results from additional diagnostic procedures.

General advice about opinions

Medical Assessors can only provide an opinion about the health of the applicant for the duration of the visa they have applied for. They cannot say they are likely to meet ASH requirements if the length of the visa was shorter, and they cannot comment on the applicant's eligibility for a visa.

Opinions entered in the IHS are discoverable. This means that they can be seen by anyone:

- with access to the system, or
- who makes an official request for all the information relating to a case, for example the applicant or their lawyer or their Licenced Immigration Advisor.

Opinions are clearer to readers if they do not use medical abbreviations. They may also include the details of other Medical Assessors or INZ staff, such as the Chief Medical Officer, if they were consulted.

Conflict of interest

If the Medical Assessor believes they may have a conflict of interest, for example they know or are related to the applicant, they do not undertake the assessment.

Preparing for an assessment

Before doing an assessment the Medical Assessor opens every document relating to the assessment and assures themselves that they have all the necessary documentation, including relevant test reports, and translations of documents provided in other languages. They also check that the documents are current and valid.

In preparing to make an assessment, Medical Assessors consider the following information:

- whether the applicant is applying for a temporary entry or resident visa – this determines the criteria they apply for the assessment
- if the applicant is intending to work or study so that they can assess the medical information according to the visa's purpose or conditions
- their age, in case it has a bearing on whether they might qualify for ORS funding – if they might, then the HAT IO must refer the medical certificate to the Ministry of Education for assessment
- how long they will be in New Zealand as this may affect their need to access New Zealand's health services.

Writing ASH opinions

If an applicant is likely to meet ASH requirements, there is normally no need for any other information, although the Medical Assessor may provide commentary to support their opinion.

Writing AWC opinions

AWC comments are passed back to the applicant so need to be clear and easy to understand. The Medical Assessor notes that the applicant is likely to meet ASH requirements for the duration of this visa, and include details of the tests or reports the applicant needs to submit when they apply for their next visa.

Recording a deferral

Applicants for residence visas can be offered a deferral in the following circumstances.

1. They have active pulmonary or non-pulmonary tuberculosis. In this case the deferral is for six months.
2. They have a history of, diagnostic findings of, or had treatment for Multidrug-Resistant-TB or Extensively Drug-Resistant-TB. In this case the deferral is up to six months.
3. They have a health condition which, if not successfully treated, would mean the applicant is likely NOT ASH. If the Medical Assessor believes that a short-term course of treatment for three months, may enable the applicant to meet ASH requirements they can suggest a deferral for three months only.

In the case of a deferral for three months, treatment could include:

- definitive treatment, such as surgery, intervention or medication
- time to recover – for example, recovery from major surgery
- surveillance and monitoring to check on the success of treatment, recovery, a cure or relapse

[Operational Manual – A4.55](#)

In giving their opinion, the Medical Assessor notes:

- why the application is being deferred
- the length of the deferral, and
- specific details of tests and reports the applicant needs to submit at the end of that time.

Writing NOT ASH opinions

After considering all the submitted information, the Medical Assessor provides reasons why there is a high probability the applicant has not met ASH requirements. These opinions are often the most detailed as they can become the subject of a review. They include:

- the health criteria for a temporary entry or resident visa that the applicant has not met
- all medical conditions or disabilities that support the Medical Assessor's opinion and why they are a concern
- the probable health or special education services the applicant may need, and the average cost if it is relevant
- the probable frequency of treatments
- whether the opinion is affected by the length of the applicant's intended stay.

They cannot take into account the financial status of the applicant, their ability to pay for treatment, or any health insurances they have.

Medical waivers

After a Medical Assessor has given an opinion of likely NOT ASH, the IO assessing the applicant's visa application can, in some cases, approve the visa application by giving a medical waiver. They consider whether the applicant's benefits to New Zealand outweigh the risks of their potential medical costs and demands on New Zealand's health services.

The INZ Operational Manual has full details of when a medical waiver can or cannot be granted.

[Medical waivers \(applicants for residence class visas\) – A4.60](#)

[Medical waivers \(applicants for temporary entry class visas\) – A4.65](#)

Requesting further information

If a Medical Assessor cannot form an opinion from the information submitted by an applicant, they can request further information including tests and specialist reports. This is called a Further Information Request (FIR).

They may also make a FIR if the medical information is not complete or they believe the medical certificate shows evidence of tampering or unauthorised alterations.

The request should contain clear details of:

- all the information, including tests the Medical Assessor needs, and
- the kind of doctors or specialists who can provide each piece of information.

Referrals to the Ministry of Education

Applicants for student visas or resident visas under the age of 21 may, in a few cases, impose significant costs on New Zealand's special education services because of their ongoing extreme or severe difficulty with learning, hearing, vision, physical movement, or language use and social communication. For such an applicant, the Medical Assessor must refer the applicant's case to the Ministry of Education for an Ongoing Resource Scheme (ORS) funding assessment. ORS funding supports students with high needs and if the applicant is assessed as being eligible for ORS funding they will not meet ASH requirements.

Requesting a respiratory physician's opinion

Requests to INZ RPs include:

- information about the applicant
- their medical history
- relevant test results, and
- specific information the Medical Assessor needs from the INZ RP to complete their assessment.

If an applicant disputes a Medical Assessor's opinion

If an applicant disagrees with the opinion of a Medical Assessor they can submit information from a medical practitioner, or suitably qualified health or education professional to support their case.

The process used by the Medical Assessor to review the information differs depending on the type of visa an applicant is applying for.

For temporary visas, the Medical Assessor considers the new information and provides a final opinion.

For residence visas, the Medical Assessor confirms or changes their original opinion based on the new information. If they confirm their original opinion, the application is referred for a second opinion to a different Medical Assessor who has had no previous contact with the application. They act as a medical referee and their opinion is considered final.

The Medical Assessor provides information to the applicant about the reasons for the opinion.

[Second opinion assessments by INZ medical assessors \(residence applications\) – A4.45](#)

If the dispute over a residence visa application relates to a Ministry of Education assessment, the new information is referred to another Ministry of Education assessor for a new opinion. Their opinion is final.

[Second opinion assessments by Ministry of Education \(residence class visa applications\) – A4.50](#)

Guidelines for specific medical conditions

The INZ Operational Manual provides a list of medical conditions that are likely to impose significant costs or demands on New Zealand's health or education systems. All applicants for residence who have any of these conditions are considered NOT ASH.

[Operational Manual – A4.10](#)

Guidelines have been developed for Medical Assessors to use when assessing some of these health conditions including:

- Cardiovascular diseases
- Cochlear implants
- Diabetes
- Haemophilia
- Hepatitis B
- Hepatitis C
- HIV
- Non Tuberculous Mycobacterium
- Renal failure and dialysis treatment
- Syphilis, and
- TB.

There are also guidelines to help with assessing:

- an applicant who may have special education needs
- an applicant who may need full-time care
- urinalysis results
- blood test results, and
- chest X-rays.

Requesting the guidelines

Medical Assessors can request the guidelines in PDF format by emailing: INZ-HealthSupport@mbie.govt.nz.

Online references

This list comprises INZ and other resources which can support the work of Medical Assessors.

INZ guides and forms

[Health Requirements for entry to New Zealand \(INZ 1121\)](#)

New Zealand Immigration [Panel Member Instructions \(INZ 1216\)](#)

These downloadable certificates are only used in countries that do not have Panel Physicians:

- [Chest X-ray Certificate \(INZ 1096\)](#)
- [General Medical Certificate \(INZ 1007\)](#)
- [Limited Medical Certificate \(INZ 1201\)](#)
- [RSE Scheme Supplementary Medical Certificate \(INZ 1143\)](#)

INZ website

[Operational Manual – A4 Health requirements](#)

[Panel physician network](#) – includes testing requirements, tools and instructions

[Health](#) – information for visa applicants

[Health requirements factsheet](#) – for media

Other health and education references

[Ongoing Resourcing Scheme \(ORS\) – Ministry of Education](#)

[Pharmaceutical Schedule – PHARMAC](#) - contains some information on pharmaceutical costs

[Ongoing Resourcing Scheme \(ORS\) – Ministry of Education](#)

[The economic cost of serious mental illness and comorbidities in Australia and New Zealand – The Royal Australian & New Zealand College of Psychiatrists](#)

[Guidelines for Tuberculosis Control in New Zealand, 2019 – Ministry of Health](#)

Online medical tools and calculators

[HbA1c Conversion Chart – National Health Service Wales](#)

[Cholesterol Unit Conversion – Endmemo](#)

[eGFR calculator – Kidney Health Australia](#)

[CVD risk assessment calculator for people with Type 2 diabetes in New Zealand – New Zealand Society for the Study of Diabetics](#)

[QRISK calculator 2018 – ClinRisk Ltd](#) – calculates the risk of someone who is not diabetic having a stroke or heart attack in the next 10 years

[Radiology Assistant – Radiology Society of the Netherlands](#) – online learning tool for interpreting chest X-rays

Released under the Official Information Act 1982

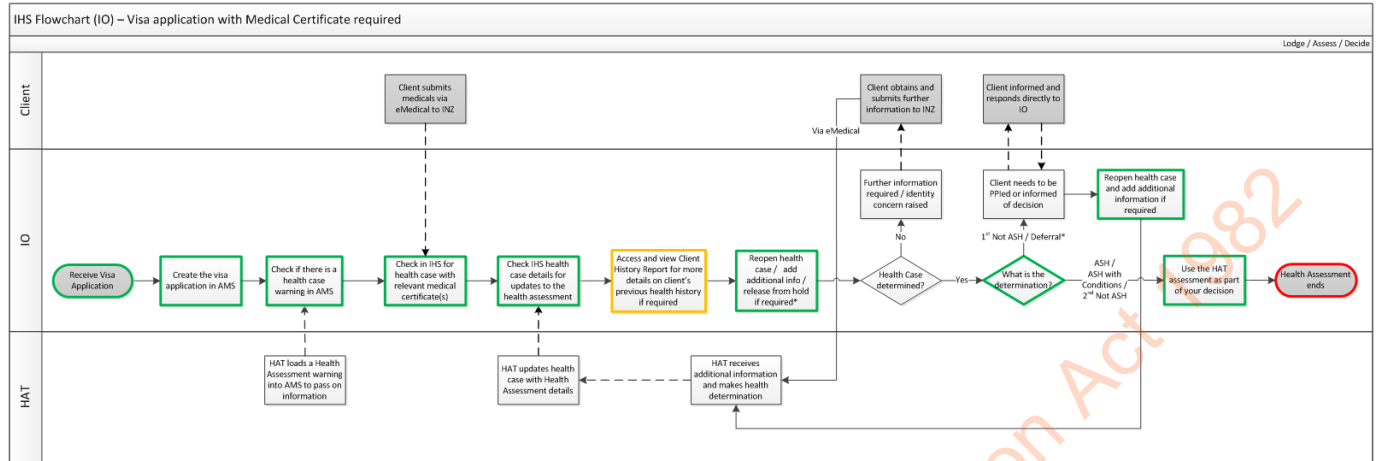
Global Process Manual

You are here: [IHS and Health > Immigration Health System Flowchart](#)

Immigration Health System Flowchart

Click [here](#) to view the IHS flowchart

This flowchart illustrates IO and the HAT responsibilities and the actions within the Immigration Health System (IHS), in the process of lodging and determining a visa application that requires medicals.



Note:
* Contact HAT if clarification required

- See Also
- [IHS and Health](#)
 - [IHS Known issues](#)
 - [Accessing Health Case 'Full View' in IHS](#)
 - [Check the Health Case Status in IHS](#)
 - [Check the Health Assessment Outcome in IHS](#)
 - [Checking Medical Certificates in IHS](#)
 - [Determine Further Requirements for a Health Case](#)
 - [Searching for a Health Case in IHS](#)
 - [Re-open a health case in IHS](#)
 - [Put a health case on hold in IHS](#)
 - [Release a health case from on hold in IHS](#)
 - [Update the visa details in a health case in IHS](#)
 - [Update the email address on a health case in IHS](#)
 - [IHS Visa Details Cheatsheet](#)
 - [Client History Report](#)
 - [View the Client History Report](#)
 - [Client History Report Process](#)
 - [Communications to HAT](#)
 - [Recording Health Details in AMS](#)
 - [Managing the Health Status report for the Office](#)
 - [FAQ](#)
 - [IHS Training Videos](#)
 - [Immigration Health System \(HAT\)](#)
 - [Hidden Footnotes](#)

Released under the Official Information Act 1982

IHS Known issues

As at 24 August 2018, after the release of the Immigration Health System (IHS) SC4 changes, the following are the known issues in IHS for releases (V.2.0.1 and V.2.0.2).

Note that these issues may impact other users or areas of IHS in addition to those stated in the scenarios below.

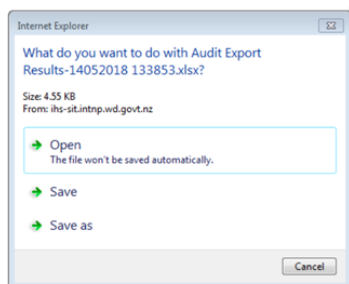
For any of these issues or new issues found regarding the IHS functions, please contact the MBIE Service Desk: service.desk@mbie.govt.nz in the first instance.

On clicking the Download/Export links, user should click 'Save / Save as' on prompt rather than 'Open' [IPSAA-238]

This is existing production behaviour (pre-dates the SC4 project).

Issue

Any download links within IHS gives the user the Internet Explorer prompt with 'Open', 'Save' and 'Save as' options (see screen shot below.)



Clicking 'Open' in the Internet Explorer pop-up opens a new browser tab or window but it does not progress any further and the document does not open.

The user flow where the issue was noticed is Admin>Rules> in the Rules configuration UI but issue likely to be present in any areas of IHS where documents can be downloaded.

This is a known Internet Explorer issue within the MBIE environment.

Business Impact

Low business impact as only couple of users (in IHT) with access to Rules UI is impacted. Workaround is to select Save or Save as instead of Open.

This is a current production issue for System Admin users and was also observed in the UAT environment.

Impacted users

System Admin user in the Rules UI.

What you need to do

In Internet Explorer, when clicking in the Download/Export links from IHS, the user should click 'Save' or 'Save as' on the prompt rather than 'Open'.

Then save the file locally or on a network drive, then open the file to view and continue from there.

Or try using Chrome as your browser instead.

Manual refresh of browser changes the IO full view back to the default IO view [IPSAA-201]

This is existing production behaviour (pre-dates the SC4 project).

Issue

A manual refresh of the browser for an IO user when in Full View defaults the user back to the standard IO view. A likely scenario is when the user refreshes the browser to reflect the state changes from hold to manual assessment or vice versa. The user will have to repeat all steps to go back to the Full View.

Steps:

1. Login as an IO and access a HC; user is presented with the default Identifiers tab and other 3 tabs
2. Select to click Full View; enter reason for viewing and comments and click save; user presented with the rest of the other tabs as expected
3. Refresh the browser via F5 or using the IE refresh icon.

Expected results: The IO view remains in Full View despite refreshing the browser. User will have to repeat all steps to go back to the Full View.

Actual results: The IO full view is refreshed but reflected back to the default Standard View (of the four tabs including the Cancel, Full View, Hold and Save buttons).

This is a current production issue.

Another scenario is where user is in Full View and changes the identifier field but does not save it yet and moves across the

tabs. Returning to the identifiers tab will not show the original value unless the page is refreshed. This behaviour has resulted from SC4 August 2018 changes to this UI.

Impacted users

IO users in Full View.

Business Impact

This is unreported production behaviour for IO users in Full View; has low business impact as it is not a likely scenario to refresh the page once in Full view mode.

This defect was also being observed in the UAT environment.

What you need to do

IO users will need to repeat all steps to go back to the Full View i.e. select the 'Full View' button and enter a reason for Full View access again.

See Also

- [IHS and Health](#)
- [Immigration Health System Flowchart](#)
- [Accessing Health Case 'Full View' in IHS](#)
- [Check the Health Case Status in IHS](#)
- [Check the Health Assessment Outcome in IHS](#)
- [Checking Medical Certificates in IHS](#)
- [Determine Further Requirements for a Health Case](#)
- [Searching for a Health Case in IHS](#)
- [Re-open a health case in IHS](#)
- [Put a health case on hold in IHS](#)
- [Release a health case from on hold in IHS](#)
- [Update the visa details in a health case in IHS](#)
- [Update the email address on a health case in IHS](#)
- [IHS Visa Details Cheatsheet](#)
- [Client History Report](#)
- [View the Client History Report](#)
- [Client History Report Process](#)
- [Communications to HAT](#)
- [Recording Health Details in AMS](#)
- [Managing the Health Status report for the Office](#)
- [FAQ](#)
- [IHS Training Videos](#)
- [Immigration Health System \(HAT\)](#)
- [Hidden Footnotes](#)

Released under the Official Information Act 1982

Global Process Manual

You are here: [IHS and Health](#) > [Accessing Health Case 'Full View' in IHS](#)

Accessing Health Case 'Full View' in IHS

When to use

Use this procedure to review the detailed historic health case notes for a health case within the Immigration Health System (IHS) when the information available in the general tabs of the health case (standard view) is not sufficient to complete a particular undertaking for determining a visa application.

Follows on from SOPs:

- [Searching for a Health Case in IHS](#)
- [Check the Health Case Status in IHS](#)
- [Checking Medical Certificates in IHS](#)
- [Check the Health Assessment Outcome in IHS](#)

Role

- Support Officer
- Immigration Officer
- Technical Advisor
- Customer Services Officer

Prerequisites

You have:

- Searched and located the relevant health case in the Immigration Health System (IHS). Refer to [SOP Searching for a Health Case in IHS](#).
- Checked the status of the health case. Refer to [SOP Check the Health Case Status in IHS](#).
- Checked the medicals in the health case. Refer to [SOP Checking Medical Certificates in IHS](#).
- Checked the 'Case Summary' tab and reviewed the information under the 'Latest Assessment Notes', 'Assessment Outcome', and 'Latest Assessment Conditions' for details about the current status and/or health assessment outcome. Refer to [SOP Check the Health Assessment Outcome in IHS](#).
- Checked the 'Case Timeline' tab and reviewed the case outcome and status history tables to review what changes have occurred and what identifiers have been recorded on the health case.

Context

When you log into IHS as an IO user, and have searched for and located a health case, you are presented with the standard view access to the general health case tabs: Case Summary, Case Timeline, Further Requirements and Visa Details. The default page you land on when opening a health case is the Visa Details tab.

There are instances where the information in the general health case tabs is not sufficient to action a particular undertaking. If you require more detailed information, including historical case notes for the health case, then you can view the health case in 'Full View'. Accessing 'Full View' provides more information about a health case that may be used in Potentially Prejudicial Information letters, responding to privacy requests or making information requests.

'Full View' provides you with access to the following additional health case tabs:

- **Medical History** tab displays the medical history information for the health case. It includes all the details about the client's medical history, and the clinic and physician that performed it.
- **Health Requirements** tab is where all the required medical information from the Panel Physician (PP) is recorded and details of the examinations or tests may be viewed. Information about the General Medical, Limited Medical and Chest X-ray, as well as blood test results, can be viewed here.
- **HAT Assessment** tab shows all the recorded notes made by HAT including notes for themselves about referrals / visa types, as well as a record of the further requests etc. It also includes record of which business rules the health case has triggered. The information displayed may look slightly different depending on the state of the health case.
- **MA Opinion** tab is where the medical opinions of the Medical Assessor(s) are viewable. It details the history of medical opinions with the reasons (notes) for those opinions. Note that if the health case has auto-cleared, the Medical Opinion tab will be blank.

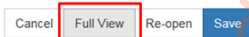
'Full View' access also enables you to print the health case and the medical certificate(s).

Steps

1. Select Full View

See [IHS Manual/IO - Full View](#)

The 'Full View' button can be found in the 'Quick Access Menu' in any tab for a health case.

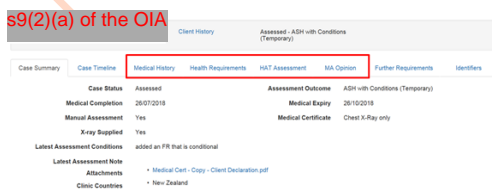


You will be prompted by the 'Access Full Health Case' dialogue box

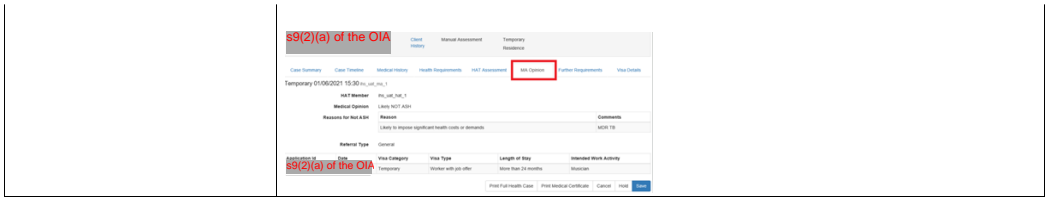
2. Complete the fields in the 'Access Full Health Case' dialogue box

- In the 'Reason for Viewing' drop down box, select the reason for requiring full view; and
- If required, explain why full view is required in the 'Comments' text field; then
- Click 'Save' in the 'Access Full Health Case' screen

Note: After clicking 'Save' a new set of tabs will appear for the health case in IHS. Example below: Click 'Save' in the 'Access Full Health Case' screen



If the Case Timeline tab shows the health case has at any time...	Then...
Not been in 'Medical Opinion' status	Continue to Step 4
Been in 'Medical Opinion' status	Click the 'MA Opinion' tab to view the latest instructions provided by the Medical Assessor. Review the notes under the 'Medical Opinion' section for each 'Medical Opinion'. This will show details about the MA's assessment of the health case. It will also show the Visa Category and Type, Referral Type, Length of Stay and Intended Work Activity for each decision, plus the reason for a decision if is NOT ASH.

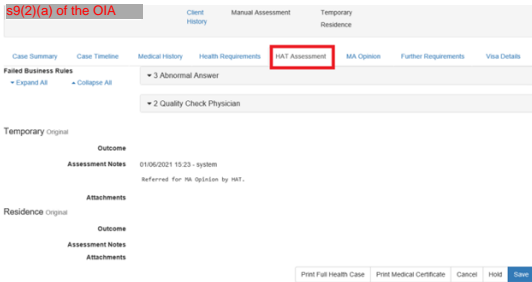


- Determine if the health case has been referred to MA
- Click Review the 'HAT Assessment' tab to view the actions undertaken by HAT

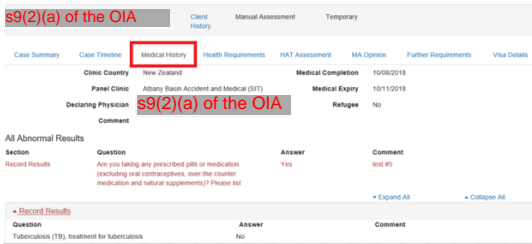
The HAT Assessment tab shows all the recorded notes made by HAT including notes for themselves about referrals / visa types, as well as a record of the further requests and details of any business rules the health case has triggered.

View the detailed information on the assessment to determine if the assessment meets the medical requirements for the visa application being assessed.

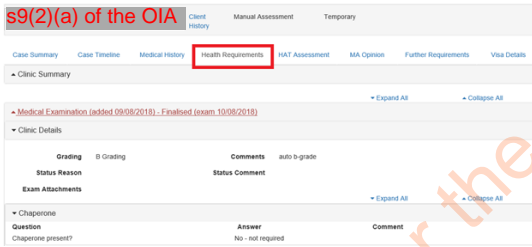
Review the notes under the 'Assessment Notes' and 'Outcome' sections within the appropriate Visa Category for details about how the current status and/or health assessment outcome has been reached and / or any previous assessments.



- Check the additional medical information in the health case
- Review the additional information available in the health case within the following tabs as required.
- Medical History tab:** Review the medical history information to check what the client has declared.



Health Requirements tab: Check the details of this tab to see which exams the client has done and the results. View the exams (attachments) and print them if required.



- Determine if the information is sufficient for the visa application being assessed

If the information obtained through this process is...	Then...
Sufficient	Process ends.
Not sufficient	Escalate the case to your Technical Advisor or Immigration Manager who may contact HAT for more information about the health case. Contact the HAT if you need clarification on any of the information in a health case. Refer to SOP Communications to HAT on how to do this.

End.

See Also

- [IHS and Health](#)
- [Immigration Health System Flowchart](#)
- [IHS Known issues](#)
- [Check the Health Case Status in IHS](#)
- [Check the Health Assessment Outcome in IHS](#)
- [Checking Medical Certificates in IHS](#)
- [Determine Further Requirements for a Health Case](#)
- [Searching for a Health Case in IHS](#)
- [Re-open a health case in IHS](#)
- [Put a health case on hold in IHS](#)

- [Release a health case from on hold in IHS](#)
- [Update the visa details in a health case in IHS](#)
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- [IHS Visa Details Cheatsheet](#)
- [Client History Report](#)
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- [Client History Report Process](#)
- [Communications to HAT](#)
- [Recording Health Details in AMS](#)
- [Managing the Health Status report for the Office](#)
- [FAQ](#)
- [IHS Training Videos](#)
- [Immigration Health System \(HAT\)](#)
- [Hidden Footnotes](#)

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Check the Health Case Status in IHS

When to use

To determine the status of a health case in the Immigration Health System (IHS).

Who is responsible?

Any INZ visa application processing staff with IO user access in IHS:

- Support Officer
- Immigration Officer (IO)
- Technical Advisor
- Customer Service Officer
- Immigration Manager



Pre-requisites

You have:

- received a visa application that requires medicals from a client;
- an action to check the status of the corresponding health case.
- located the health case in IHS and checked that the health case is still valid and the medicals have not expired. Refer to [SOP Checking Medical Certificates in IHS](#)

Context

The health case status shows where the health case is in its lifecycle within IHS. By identifying the state of the health case you can determine your next steps in regards to health requirements when processing a visa application.

References

For more details on the IHS health case lifecycle and states refer to IHS training video: [Health Case States](#).

Steps

1. Search and locate the relevant health case in IHS

[SOP Searching for a Health Case in IHS](#). Refer also to training video: [Search for a Health Case in IHS](#).

You can also use the [Client History Report](#) in IHS to find the matching health cases for your client.

When you have located the health case in IHS, it will open on the Visa Details tab.

Important Note: Ensure that you have located the correct health case for the correct client before you proceed with updating any of the details.

2. Check the 'Case Status' in the 'Case Summary' tab

The status of the health case will display in the grey banner at the top of the health case. The health case status is also presented in the 'Case Status' field in the 'Case Summary' tab.

Determine your next steps:

If the 'Case status' is...	Then...
Open	<p>The medical and/or chest x-ray certificate has not yet been submitted to Immigration New Zealand (INZ) by the panel physician.</p> <p>1. First, you should advise the client that their health case has not yet been submitted to INZ and they should contact their panel physician.</p> <p>Suggested template message: Dear XXX, We noticed that your health case status on our Immigration Health System is Open. We kindly ask that you discuss with your panel physician to finalise and submit your health case as soon as possible in order for us to continue processing your application. Kind regards, Immigration New Zealand</p> <p>Important Note: INZ staff should not correspond directly with Panel Physicians. If INZ needs to contact a Panel Clinic or Physician, you should email the Immigration Health Team (INZ-HealthSupport@mbie.govt.nz), who will approach the clinic on your behalf.</p> <p>2. If the panel physician advises that the health case has been submitted, then contact the Health Assessment Team (HAT) at HAT@mbie.govt.nz. Use the subject heading 'OPEN HEALTH CASE for NZER: xxxxx'. Refer to SOP Communications to HAT for details.</p> <p>Note: You can update the Visa Details and add new applications to the health case while it is in an 'Open' state where you are using the health case for a current application that needs assessment. Add some details in the 'Referral Note' field for why you are updating the Visa Details to advise what you need the HAT or MA to do with the health case next. Enter any information into this field that you would like regarding the assessment required. For example, 'Visa application received. Please refer health case for assessment.'</p> <p>Process ends.</p>
Awaiting Further Requirements	<p>An outcome has not yet been made as the assessment cannot be completed with further tests or a specialist opinion and these requirements have been prescribed.</p>  <p>Review the details in the 'Further Requirements' tab.</p> <p>Note: You can update the Visa Details and add new applications to the health case while it's in an 'Awaiting Further Requirements' state where you are using the health case for a current application for an assessment. Refer to SOP Update the visa details in a health case in IHS and FAQs – Visa Details in IHS. Add information in the 'Referral Note' field for why you are updating the Visa Details to advise the HAT or MA what you need done with the health case next, regarding the assessment required. For example, 'Updated for Residence application. Further information received and attachments sent to HAT via email.'</p> <p>Go to SOP Determine Further Requirements for a Health Case.</p>
Assessed	<p>An assessment outcome (ASH, ASH with conditions, Not-ASH) has been made. This includes a 'Deferral' medical decision or assessment as 'Incomplete'.</p>

s9(2)(a) of the OIA
s9(2)(a) of the OIA

Client History **Assessed** Temporary ASH Residence ASH

Case Summary Case Timeline Further Requirements Visa Details

Case Status Assessed

Medical Completion 03/03/2018 Medical Expiry 03/11/2018

Manual Assessment No Medical Certificate X-ray

Latest Assessment Conditions

Latest Assessment Note

Attachments

Clinic Countries

Note: You can update the Visa Details and add new applications to in the health case while in an 'Assessed' state where you are using the health case for a current application that needs an assessment. Refer to [SOP Update the visa details in a health case in IHS](#) and [FAQs – Visa Details in IHS](#). Add information in the 'Referral Note' field for why you are updating the Visa Details and what you need done with the health case next, regarding the assessment required. If you are re-opening the health case, please select the relevant re-open reason and add any additional information in the 'Referral Note' field. Refer to [SOP Re-open a health case in IHS](#). For example: 'Subsequent visa application received. Please prescribe AWC tests. Or 'New information attached. Please complete assessment.'

Go to [SOP Check the Health Assessment Outcome in IHS](#) to determine your next step.

Hold The health case is on hold while waiting for further actions or information from others.

s9(2)(a) of the OIA

Client History **Hold** Temporary

Case Summary Case Timeline Further Requirements Visa Details

Case Status Hold

Medical Completion 04/03/2021 Medical Expiry 04/06/2021

Manual Assessment Yes Medical Certificate General + X-ray

Determine next steps:

1. Update the visa details and application details**
2. Add the attachments if you have received the information required to upload to the health case (Hold reason = 'Manual Assessment held pending information from IO')
3. Release it from hold if you have received the visa application and it is accepted or after information is added.

**** Important Note:** You can update the Visa Details and application details in a health case while it is in a 'Hold' state if you are releasing it from on hold for an assessment. Refer to [SOP Update the visa details in a health case in IHS](#) and [FAQs – Visa Details in IHS](#).

Add information in the 'Referral Note' field for why you are updating the Visa Details and releasing it from on hold to advise what you need the HAT or MA to do with the health case next, regarding the assessment required. For example, 'Visa application received. Please refer health case for assessment for Residence.'

Refer to [SOP Release a health case from on hold in IHS](#).

'Manual Assessment' The health case requires an assessment from the HAT.

s9(2)(a) of the OIA

Client History **Manual Assessment** Temporary

Case Summary Case Timeline Further Requirements Visa Details

Case Status Manual Assessment

Medical Completion 05/11/2014 Medical Expiry 05/02/2015

Manual Assessment Yes Medical Certificate General + X-ray

The 'Assessment Outcome' field will be 'Manual Assessment Required'. An outcome is yet to be determined for the health case.

Note: You can update the Visa Details and add new applications while the health case is in a 'Manual Assessment' state. Refer to [SOP Update the visa details in a health case in IHS](#) and [FAQs – Visa Details in IHS](#).

Add information in the 'Referral Note' field for why you are updating the Visa Details to advise what you need the HAT or MA to do with the health case next. Enter any additional information regarding the assessment required. For example: 'Visa application received. Please refer for health assessment'. Or 'Visa application withdrawn. Please finalise as incomplete health case assessment'.

Go to next step.

'Medical Opinion' The health case is being assessed by a Medical Assessor (MA).

s9(2)(a) of the OIA

Client History **Medical Opinion (With MA)** Temporary

Case Summary Case Timeline Further Requirements Visa Details

Case Status Medical Opinion

Medical Completion 18/11/2014 Medical Expiry 18/02/2015

Manual Assessment Yes Medical Certificate General

An outcome is yet to be determined for the health case.

Note: You cannot update the Visa Details while the health case is in a 'Medical Opinion' state but you can add new applications to the health case. You will need to wait until the assessment is complete or contact the HAT via email (HAT@mbie.govt.nz). Refer to [SOP Communications to HAT](#).

Go to next step.

'Obsolete' The health case is no longer valid. Process ends.

Important Note: If the visa application is to be declined or has been withdrawn, contact the HAT as soon possible if the health case is in an 'Open', 'Awaiting Further Requirements', 'Medical Opinion' or 'Manual Assessment' state so that the health case can be finalised as incomplete before it is assessed. You do not need to advise HAT if the health case has already been assessed. Contact the HAT via email (HAT@mbie.govt.nz) using 'TERMINATE HEALTH CASE FOR NZERxxxx' subject heading. Refer to [SOP Advise HAT when a visa application is withdrawn or declined for details](#). You can still update the Visa Details. Add information in the 'Referral Note' field for why you are updating the visa details to advise the HAT what you need done with the health case next. For example, 'Application declined / withdrawn but health case already assessed'.

3. Review the 'Latest Assessment Note' in the 'Case Summary' tab

Review the 'Latest Assessment Note' section in the 'Case Summary' tab for more information about the current health case status. This section it will provide you with information regarding the most recent change, action or status made to a health case.

s9(2)(a) of the OIA

Client History Manual Assessment Temporary

Case Summary Case Timeline Further Requirements Visa Details

Case Status Manual Assessment

Medical Completion 23/10/2014 Medical Expiry 23/01/2015

Manual Assessment Yes Medical Certificate General + X-ray

Latest Assessment Conditions

Latest Assessment Note 18/09/2023 11:26
Further test reports received - pending HAT assessment.

Attachments

Clinic Countries

Next steps

You will need to wait until the health case assessment is completed.

Track the status of the health case to check when it has been assessed. Check the [Health Status Report](#) for updates. Refer to [SOP Managing the Health Status report for the Office](#). Follow up with HAT as required.

When the health case is assessed, refer to [SOP Check the Health Assessment Outcome in IHS](#).

Contact the HAT (HAT@mbie.govt.nz) for any queries. Refer to [Communications to HAT](#).

Process ends.

See Also

- [IHS and Health](#)
- [Immigration Health System Flowchart](#)
- [IHS Known issues](#)
- [Accessing Health Case 'Full View' in IHS](#)
- [Check the Health Assessment Outcome in IHS](#)
- [Checking Medical Certificates in IHS](#)
- [Determine Further Requirements for a Health Case](#)
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- [FAQ](#)
- [IHS Training Videos](#)
- [Immigration Health System \(HAT\)](#)
- [Hidden Footnotes](#)

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Check the Health Assessment Outcome in IHS

When to use

To determine the outcome of the medical and/or chest x-ray certificates included in a health case in the Immigration Health System (IHS)

Role

- Support Officer
- Immigration Officer
- Customer Service Officer
- Technical Advisor
- Immigration Manager

Prerequisites

You have:

- received a visa application that requires medicals from a client;
- an action to check the assessment outcome of the corresponding health case
- located the health case in IHS and checked that the health case is still valid and the medicals have not expired. Refer to [SOP Checking Medical Certificates in IHS](#).
- checked the case status and the case is 'Assessed'. Refer to [SOP Check the Health Case Status in IHS](#).

Context

The health case assessment outcome determines what instructions and procedures will apply to a visa application in regards to health requirements when processing a visa application.

Important Note: If the visa application is to be declined or has been withdrawn, contact the HAT as soon possible if the health case is in an 'Open', 'Awaiting Further Requirements', 'Medical Opinion', 'Manual Assessment' or 'Hold' state so that the health case can be finalised as 'Incomplete' before it is assessed.

Refer to [SOP Advise HAT when a visa application is withdrawn or declined](#).

You do not need to advise HAT if the health case has already been assessed.

Steps

1. Search and locate the relevant health case in IHS

Refer to [SOP Searching for a Health Case in IHS](#).

You can also use the [Client History Report](#) in IHS to find the matching health cases for your client.

When you have located the health case in IHS, it will open on the Identifiers tab.

Important Note: Ensure that you have located the correct health case for the correct client before you proceed with adding the application in IHS.

2. View the latest grey banner at the top of the page.

Check the grey banner at the top of the page to view the latest health case assessment outcome. This will indicate if it has been Assessed for a particular visa category.

Review the details of the latest health assessment to check if the health case can be applied to your visa application or if it needs to be reassessed under different criteria. This will also confirm if you need to re-open the health case or not. (Refer to [SOP Re-open a health case in IHS](#)).

The latest assessment outcome and the visa category for that assessment are displayed in the grey banner at the top of an 'Assessed' health case.

The screenshot shows the top of the IHS interface with a grey banner indicating 'Assessed: ADH with Conditions (Temporary)'. Below this, the 'Case Summary' tab is active, showing 'Case Status: Assessed' and 'Assessment Outcome: ADH with Conditions (Temporary)'. Other details include 'Medical Completion: 26/07/2018', 'Manual Assessment: Yes', 'X-ray Supplied: Yes', and 'Latest Assessment Conditions: added an FR that is conditional'.

3. Review the 'Latest Assessment Note' in the 'Case Summary' tab

Check the 'Latest Assessment Note' section in the 'Case Summary' tab for more information about the current health case status.

If available this section will provide you with information regarding the most recent change, action or status made to a health case.

Latest Assessment Conditions: Applicant is ADH for this visa. Further applications will require an updated letter from a gastroenterologist with - HbA1c, HBV DNA, LFTs and a Liver Fibroscan.

Latest Assessment Note:
 ASSISTANCE
 GPC - CAR referred to IHS and assessed under Temporary
 9813200: ADH with Conditions - ADH for an [REDACTED] only
 Required Test/Report for further review: Applicant is ADH for this visa further applications will
 require an updated letter from a gastroenterologist with - HbA1c, HBV DNA, LFTs and a Liver FI
 Fibroscan.
 Case officer to contact HAT to prescribe the required test/report then request from client
 & medical reference (NDIR: [REDACTED] / NDIR: [REDACTED])
 E-medical Panel physician: Test/report to be submitted under the same health case.
 Non medical physician: Test/report can be forwarded via email.
 For outside NZ - i.e. Panel Physician: imhs@nzmbie.govt.nz
 For Inside NZ - i.e. Case Officer: ni@nzmbie.govt.nz

Note: If there are no assessment notes, this indicates that the medical certificate has been auto-assessed. Refer to [FAQs - 'Auto-Assessed' health cases](#).

4. Check the health case 'Outcome History' table in the 'Case Timeline' tab

Check the 'Outcome History' table in the 'Case Timeline' tab for details of the latest assessment in a health case, including the previous health assessment(s) in case they can be applied to the application you are lodging or assessing.

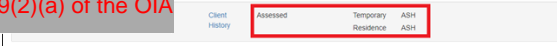

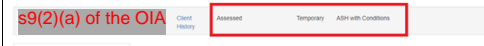
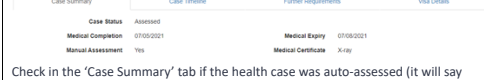

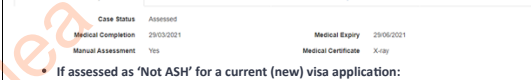
The screenshot shows the 'Case Timeline' tab with the 'Outcome History' table. The table has columns for Username, Date, Outcome, Visa Category, Visa Type, Length of Stay, Application Id, and Referral Type. The first row shows a health case assessed on 26/07/2018 with an 'ADH with Conditions' outcome, 'Temporary' visa category, and 'Visitor' visa type.

Note: Each assessment of the health case is shown in the 'Outcome History table' with the Assessment Outcome for each assessment based on the Visa Category, Visa Type, Referral Type, and Length of Stay that will indicate if it is ASH etc. for a particular visa type (or application) only.

An auto-assessed assessment will show as 'system' for the username. Refer to [FAQs - 'Auto-Assessed' health cases](#).

5. Review the health assessment outcome in the 'Case Summary' tab

Review the health assessment outcome of the health case. Use the table of 'Assessment Outcome' results below to determine your next actions:

If the assessed visa category states...	Then...
<p>ASH (Acceptable Standard of Health)</p>	<p>The health case has been assessed as an Acceptable Standard of Health (ASH) for the aligned visa category.</p>  <p>s9(2)(a) of the OIA</p>  <p>Check in the 'Case Summary' tab if the health case was auto-assessed (it will say "No" in the 'Manual Assessment' field):</p> <ul style="list-style-type: none"> If auto-assessed as 'ASH' then: <ul style="list-style-type: none"> Then the health case outcome can be applied to the new visa application, but only if the health case has not expired, the visa application was submitted before the medical expiry date, and the health case has been assessed under the appropriate category. If the visa application is a subsequent visa (i.e. the health case has already been applied to a previous application within the medical expiry date timeframe) then if the health case is within 36 months of the medical submission date (i.e. the health case is still valid and has not expired and the health case has been assessed under the appropriate category, the ASH health outcome can be applied to the subsequent visa application category. If the health case has not been assessed under the appropriate category then: <ul style="list-style-type: none"> It needs to be re-assessed against the different criteria (Visa Category and / or Referral Type). You will need to re-open the health case for the new assessment. Refer to SOP Re-open a health case in IHS. <p>Go to step 6.</p>
<p>ASH with conditions</p>	<p>The health case has been assessed as ASH only for the corresponding Temporary visa application for which it has been assessed as per temporary health immigration instructions.</p>  <p>s9(2)(a) of the OIA</p>  <p>Check in the 'Case Summary' tab if the health case was auto-assessed (it will say "No" in the 'Manual Assessment' field):</p> <ul style="list-style-type: none"> If assessed as 'ASH with conditions' for a current (new) visa application the first Temporary visa application to be assessed using this health case then: <ul style="list-style-type: none"> The health case outcome can only be accepted as ASH for a temporary application submitted within three months of the medical completion date. Apply the health case outcome to the visa application assessment and notify the client of the information they must provide with their subsequent visa application. The information they must provide is stipulated in the 'Latest Assessment Conditions' section in the 'Case Summary' tab. If assessed as 'ASH with conditions' for the last (previous) visa application only and you have a Residence visa application or a further temporary visa application then: <ul style="list-style-type: none"> further assessment of the health case is required. The health case must be referred to the HAT with the information stipulated in the 'Latest Assessment Conditions' section in the 'Case Summary' tab. If the client has not yet provided the required information, then make an information request (Refer SOP Request Further Information). You will need to re-open the health case so that HAT can prescribe the further requirements. If the applicant has provided the additional information, then re-open the health case and add attachments. The case will be reassessed. Refer to SOP Re-open a health case in IHS. <p>Go to step 6.</p>
<p>Not ASH</p>	<p>The health case has been assessed as not having an Acceptable Standard of Health.</p>  <p>s9(2)(a) of the OIA</p>  <ul style="list-style-type: none"> If assessed as 'Not ASH' for a current (new) visa application: <ul style="list-style-type: none"> Then apply the health case outcome to the visa application assessment, this may result in the need for a Potentially Prejudicial Information (PPI) process If assessed as 'Not ASH' for the last (previous) visa application: <ul style="list-style-type: none"> Then the medical certificate(s) in this health case are no longer valid. The applicant is required to provide a new medical certificate. If the latest assessment is 'Not ASH' for Residence and you have a new temporary visa application then: <ul style="list-style-type: none"> Check if there is a previous assessment for Temporary that is ASH or ASH with conditions. Look in the Outcome History table in the Case Timeline tab. If there is, then you can re-open the health case. Refer to SOP Re-open a health case in IHS. <p>Process ends.</p>
<p>Deferral</p>	<p>The assessment of the health case has been deferred until all conditions have been met and no outcome has been provided. A deferral is only applicable in the case of a residence application as defined in A4.55 of the INZ Operational Manual.</p> <p>The decision details in the grey banner will state the length of the deferral (3 or 6 months).</p> <p>The deferral conditions are detailed in the latest assessment notes:</p>

s9(2)(a) of the OIA		Client History	Assessed	Residence	Deferral 3 months
Case Summary	Case Timeline	Further Requirements	Visa Details		
Case Status	Assessed				
Medical Completion	09/03/2021	Medical Expiry	09/06/2021		
Manual Assessment	Yes				
Medical Certificate	Limited				
Latest Assessment Conditions	HAT Deferral for 3 months				
Latest Assessment Note	09/03/2021 10:15 Test not Deferr				

If assessed as 'Deferral' for the current visa application, then:

- further assessment of the health case is required after the deferral period (3 or 6 months).
- apply health case outcome to the visa application assessment (record as a note in AMS as the health details cannot be completed).
- notify the client of the information they must provide to complete their visa application. The information they must provide is stipulated in the 'Latest Assessment Conditions' section in the 'Case Summary' tab.
- If the client has not yet provided the required information, then make an information request (Refer SOP Request Further Information).
- The health case must be referred to the HAT with the information stipulated in the 'Latest Assessment Conditions' section in the 'Case Summary' tab.
- You will need to re-open the health case so that HAT can prescribe the further requirements.
- If the applicant has provided the additional information, then re-open the health case and add attachments. The case will be reassessed. Refer to [SOP Re-open a health case in IHS](#).

Refer to [FAQs - Health deferrals in IHS](#) for more details.

Process ends.

Incomplete	<p>The assessment of the health case has not been completed and no outcome has been provided</p> <ul style="list-style-type: none"> • There may be more than one valid health case for the applicant • A visa application accepted within the validity of the medical may have been decided or withdrawn before an outcome is made on the health case. <p>Check the 'Latest Assessment Note' in the Case Summary' tab to confirm before you re-open a health case:</p> <ul style="list-style-type: none"> • If the case was finalised incomplete where INZ is at fault, and the applicant has applied for a new visa, then you can re-open the health case so that the case can be reassessed. Refer to SOP Re-open a health case in IHS. • If the case was finalised as incomplete because another health case supersedes it, then you will not need to re-open it. The latest assessment note will advise the health case has been finalised and which health case (NZER/NZHR) to refer to instead. <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Note: If a health case is assessed as Incomplete it may not be valid to be re-used for future applications. See A4.25.c and A4.20.d.</p> </div> <p>Process ends</p>
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Manual Assessment Required	<p>An outcome is yet to be determined for the health case (the health case status is either in 'Medical Opinion' or 'Manual Assessment' state) and no outcome has been provided.</p> <p>Next steps:</p> <ul style="list-style-type: none"> • Review the 'Latest Assessment Note' section in the 'Case Summary' tab for more information about the current health case status. • You will need to wait until the health case assessment is completed (unless a previous assessment can be applied). • Track the status of the health case to check when it has been assessed. Check the Health Status Report for updates. Refer to SOP Managing the Health Status report for the Office. Follow up with HAT as required. • When the health case is assessed, refer to Check the Health Assessment Outcome in IHS. <p>Process ends.</p>
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Note: You may need to re-open a case. Refer to [SOP Re-open a health case in IHS](#).
When re-opening a health case for a new assessment, you must update the Visa Details in the health case, including the Application Details. Add information in the 'Referral Note' field for why you are updating the visa details and advise what you need the HAT or MA to do with the health case next. Enter any information you would like to advise the HAT or MA regarding the assessment required. Refer to [Update the visa details in a health case in IHS](#).

6. Determine if the health information in the health case is sufficient to continue processing the application

You must confirm that the medical certificate and/or chest x-ray in the health case can be accepted for the new application you are lodging or assessing. Review all the details in the health case 'Case Summary', 'Case Timeline' and 'Further Requirements' tabs to determine if the information is sufficient to continue processing the visa application.

Determine your next step:

If the information is...	Then...
Sufficient	<p>Apply health case details to the visa application as required. Record the health assessment outcome and the NZER in AMS against the applicant's application. Refer to SOP Recording Health Details in AMS.</p> <p>Process ends.</p>
Not sufficient	<p>Review health case details in Full View and then repeat step 4. Refer to SOP Accessing Health Case 'Full View in IHS'</p> <p>Review the 'Outcome History' table of the 'Case Timeline' tab for details of the last assessment and any previous assessments (in case they can be applied).</p> <p>Determine your next step:</p> <ul style="list-style-type: none"> • The current or a previous assessment is sufficient. Record the health assessment outcome and the NZER in AMS against the applicant's application. Refer to SOP Recording Health Details in AMS, or • Health case needs to be reassessed. Re-open health case to reactivate the health case for reassessment. Refer to SOP Re-open a health case in IHS. Record the health assessment outcome and the NZER in AMS against the applicant's application. Refer to SOP Recording Health Details in AMS, or • Client needs to submit new medicals. Process ends.

Important Note: You should check against the immigration instructions for the application you are lodging or assessing to confirm whether a new medical certificate / chest x-ray needs to be requested or not.

End.

See Also

- [IHS and Health](#)
- [Immigration Health System Flowchart](#)
- [IHS Known issues](#)
- [Accessing Health Case 'Full View' in IHS](#)
- [Check the Health Case Status in IHS](#)
- [Checking Medical Certificates in IHS](#)
- [Determine Further Requirements for a Health Case](#)
- [Searching for a Health Case in IHS](#)
- [Re-open a health case in IHS](#)
- [Put a health case on hold in IHS](#)
- [Release a health case from on hold in IHS](#)
- [Update the visa details in a health case in IHS](#)
- [Update the email address on a health case in IHS](#)
- [IHS Visa Details Cheatsheet](#)
- [Client History Report](#)
- [View the Client History Report](#)
- [Client History Report Process](#)
- [Communications to HAT](#)
- [Recording Health Details in AMS](#)
- [Managing the Health Status report for the Office](#)
- [FAQ](#)
- [IHS Training Videos](#)
- [Immigration Health System \(HAT\)](#)
- [Hidden Footnotes](#)

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Checking Medical Certificates in IHS

When to use

Use this procedure to check the details of what medical and/or chest x-ray certificates are included in a health case in the Immigration Health System (IHS).

Role

- Support Officer
- Immigration Officer
- Customer Service Officer
- Technical Advisor
- Immigration Manager

Prerequisites

A health case has been created by a panel physician in eMedical.

Context

Medical and/or chest x-ray certificates are received as health cases in the Immigration Health System (IHS).

Information in the medical and/or chest x-ray certificates are used to determine whether or not a client meets health requirements.

During lodgement and assessment you will be required to check the type of medical certificates that have been submitted and determine whether or not they are valid to be accepted with the visa application.

Steps

1. Search and locate the relevant health case in IHS.

- Refer to [SOP Searching for a Health Case in IHS](#)
- Refer to [SOP View the Client History Report](#)

2. Check the 'Case Status' in the 'Case Summary' tab.

If the case status displays...	Then...
'Open'	<p>The medical and/or chest x-ray certificate has not yet been submitted to Immigration New Zealand (INZ) by the panel physician.</p> <ul style="list-style-type: none"> • Advise the client that their health case has not yet been submitted to INZ and they should contact their panel physician. Suggested template message: Dear XXX, We noticed that your health case status on our Immigration Health System is Open. We kindly ask that you discuss with your panel physician to finalise and submit your health case as soon as possible in order for us to continue processing your application. Kind regards, Immigration New Zealand • If the panel physician advises that the health case has been submitted, then contact the Health Assessment Team (HAT) HAT@mbie.govt.nz. Process ends. <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Note: INZ staff should not correspond directly with Panel Physicians. If INZ needs to contact a Panel Clinic or Physician, you should email the Immigration Health Team (email: INZ-HEALTHSUPPORT@mbie.govt.nz), who will approach the clinic on your behalf.</p> </div>
'Obsolete'	<p>The health case is no longer valid. Process ends.</p>
Any other status	<p>Refer to SOP Check the Health Case Status in IHS. Continue to Step 3.</p>

3. Determine what medical certificates have been included in the health case.

This information can be found in the 'Case Summary' tab under the 'Medical Certificate' section.

If the 'Medical Certificate' section states...	Then...
General or Limited or Supplementary	Only a General or Limited or Supplementary medical certificate has been provided.
X-ray	Only a chest x-ray certificate has been provided
General + X-ray	Both a General medical certificate and a Chest X-Ray have been supplied.

Example: General medical certificate only (no Chest X-Ray supplied).

s9(2)(a) of the OIA Client History Manual Assessment Residence

Case Summary Case Timeline Further Requirements Visa Details

Case Status Manual Assessment

Medical Completion	30/07/2018	Medical Expiry	30/10/2018
Manual Assessment	Yes	Medical Certificate	General

Latest Assessment Conditions

Attachments

- e-medicalclientconsentdeclaration.pdf
- New Zealand

Clinic Countries

Example 2: Chest X-Ray only supplied (no other medical certificate)

s9(2)(a) of the OIA Client History Manual Assessment Temporary Residence ASH with Conditions

Case Summary Case Timeline Further Requirements Visa Details

Case Status Manual Assessment

Medical Completion 05/08/2018 **Medical Expiry** 05/11/2018

Manual Assessment Yes **Medical Certificate** X-ray

Latest Assessment Conditions

Latest Assessment Note

Attachments

- Client Decl.pdf
- Hello.pdf

Clinic Countries

- Ile of Man

Example 3: A General medical certificate and a Chest X-Ray have been supplied.

s9(2)(a) of the OIA Client History Assessed Temporary Residence ASH

Case Summary Case Timeline Further Requirements Visa Details

Case Status Assessed

Medical Completion 25/07/2018 **Medical Expiry** 25/10/2018

Manual Assessment No **Medical Certificate** General + X-ray

Latest Assessment Conditions

Latest Assessment Note

Attachments

- Client Decl.pdf

Clinic Countries

- Ile of Man

Note: Check that the medicals meet the immigration instructions criteria for the visa application you are lodging / assessing. Ensure that all medical information in the health case is the correct type for the visa application e.g. if there is only an x-ray, does the client also require a medical certificate for the visa category?

4. Check the 'Medical Completion' section in the 'Case Summary' tab.

This is the date of issue for all medical certificates included in the health case. From this date you will be able to calculate the expiry date of the medicals (36 months from the medical completion date) when it has been assessed as ASH or ASH with conditions.

Note: The health case outcome can be applied to your visa application, but only if the health case has not expired and a visa application was submitted before the medical expiry date (timeframe is within 3 months of the medical completion date).

s9(2)(a) of the OIA Client History Assessed Temporary Residence ASH

Case Summary Case Timeline Further Requirements Visa Details

Case Status Assessed

Medical Completion 25/07/2018 **Medical Expiry** 25/10/2018

Manual Assessment No **Medical Certificate** General + X-ray

Latest Assessment Conditions

Latest Assessment Note

Attachments

- Client Decl.pdf

Clinic Countries

- Ile of Man

5. Check the health case Assessment outcome displayed in the grey banner at the top of the health case.

Review the assessment outcome for the health case if assessed to determine if the outcome is appropriate for the visa application type being lodged or assessed.

Refer to SOP Check the Health Assessment Outcome in IHS.

End.

See Also

- [IHS and Health](#)
- [Immigration Health System Flowchart](#)
- [IHS Known issues](#)
- [Accessing Health Case 'Full View' in IHS](#)
- [Check the Health Case Status in IHS](#)
- [Check the Health Assessment Outcome in IHS](#)
- [Determine Further Requirements for a Health Case](#)
- [Searching for a Health Case in IHS](#)
- [Re-open a health case in IHS](#)
- [Put a health case on hold in IHS](#)
- [Release a health case from on hold in IHS](#)
- [Update the visa details in a health case in IHS](#)
- [Update the email address on a health case in IHS](#)
- [IHS Visa Details Cheatsheet](#)
- [Client History Report](#)
- [View the Client History Report](#)
- [Client History Report Process](#)
- [Communications to HAT](#)
- [Recording Health Details in AMS](#)
- [Managing the Health Status report for the Office](#)
- [FAQ](#)
- [IHS Training Videos](#)
- [Immigration Health System \(HAT\)](#)
- [Hidden Footnotes](#)

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Determine Further Requirements for a Health Case

When to use

Use this procedure to determine what further medical information is required from the client for their health case in order for the Health Assessment Team (HAT) or the Medical Assessor (MA) to complete their health assessment.

Role

- Support Officer
- Immigration Officer
- Customer Services Officer

Prerequisites

- Searched and located the relevant health case in IHS.
- A health case has been assessed by the Health Assessment Team (HAT) and/or Medical Assessor (MA) and further requirements are required
- Health Case Status may be 'Assessed', 'Manual Assessment' or 'Awaiting Further Requirements'.

Follows on from any of the below applicable SOPs:

- [SOP Searching for a Health Case in IHS](#)
- [SOP Check the Health Case Status in IHS](#)
- [SOP Check the Health Assessment Outcome in IHS](#)

Context

In some scenarios, a medical certificate may have been assessed by the HAT and/or MA, and the HAT or the MA has requested further medical information before the assessment of a health case can be completed.

Use this procedure to determine what information is required for the health case assessment in order for the HAT or the MA to complete their health assessment.

Another possible scenario is when additional medical information is requested after an assessment has been completed by the HAT or the MA, for the current or a previous visa application.

As the visa processing IO, you will need to contact the client to request this additional information so that their health can be assessed for the current application or when you receive subsequent visa application, specifically for 'ASH with Conditions' or 'Deferral' health decisions. You will also need to re-open the health case before you request additional information so that the tests can be prescribed.

Note: If you have received further information from the client, then you can re-open the health case if it has been assessed and add the attachments. Refer to [Re-open a health case in IHS](#).
Important Note: If the health case is in 'Awaiting Further Requirements' state, then you cannot attach the test results in IHS – you will need to email HAT with the attachments. Refer to [SOP Communications to HAT](#) for details on how to do this.

Steps

1. Review the 'Latest Assessment Note' in the 'Case Summary' tab

Reading this section will provide you with information regarding the most recent change, action or status made to a health case.

Case Summary	Case Timeline	Further Requirements	Identifiers
Case Status	Awaiting Further Requirements	Assessment Outcome	Manual Assessment Required
Medical Completion	09/12/2016	Medical Expiry	03/03/2017
Manual Assessment	Yes	Medical Certificate	No medical certificate
Xray Required	Yes		
Latest Assessment Conditions			
Latest Assessment Note Further test/report requested by us			
Requested test/report: chest specialist (or chest clinic) investigation and report required for current status regarding tuberculosis. A recent chest x-ray should be performed (left breast side opacity). Please include the following with report: - Clinical examination findings - Old chest x-rays for comparison - please attach a copy of the lateral and PA images from TB2 in December 2016 as DICOM format. - Request PA image at the completion of cultures - any previous reports regarding any treatment of tuberculosis. - Results of 3 current smears and cultures (sputum samples taken on 3 different occasions, or other appropriate specimens as clinically indicated) and culture for Mycobacterium tuberculosis plus DST where available if cultures are positive. Please include other pathology that could cause the abnormal x-ray findings as described above.			
Test/report has been prescribed on 26/12/2016			

Note: It is important to check the latest assessment note in the health case to see if the MA has deferred the medical opinion. If the medical opinion is deferral, then communicate what is required to the applicant appropriately. A deferral decision will be clearly displayed in the health case banner like this: Assessed – Deferral (Residence). Refer to [SOP FAQs - Health deferrals in IHS](#).

2. Click the 'Further Requirements' tab to show all requirements for the health case

Requirement	Description	Current Status	Last Update	Updated By
Chest clinic investigation on current status of tuberculosis	Chest specialist (or chest clinic) investigation and report required for current status regarding tuberculosis. A recent chest x-ray should be performed (left breast side opacity). Please include the following with report: - Clinical examination findings - Old chest x-rays for comparison - please attach a copy of the lateral and PA images from TB2 in December 2016 as DICOM format. - Request PA image at the completion of cultures - any previous reports regarding any treatment of tuberculosis. - Results of 3 current smears and cultures (sputum samples taken on 3 different occasions, or other appropriate specimens as clinically indicated) and culture for Mycobacterium tuberculosis plus DST where available if cultures are positive. Please include other pathology that could cause the abnormal x-ray findings as described above.	Prescribed (Adding Requirement)	23/01/2017	
Other (specify in description)	Awaiting additional info to be submitted by post. ICC has advised PP to send the info to post	Manually Received	09/12/2016	
Requirement History Select a further requirement above				
Date	User Login	Change Type		

3. Review the table under the 'Further Requirements' tab

This table displays all requirements that have been prescribed for a health case.

- The 'Requirements' column specifies the type of additional information needed either the type of examination or type of specialist opinion depending on what was entered.
- The 'Description' column details what the issue is and the details of what further information is required.
- The 'Current Status' column displays the most recent status information and confirms whether or not the information has been received by HAT. The table below details the possible statuses.

Current Status	Means...
Proposed	The MA or HAT is proposing this test or specialist report, but it is not required or it hasn't been actioned at this stage. (Do not request proposed tests from client yet. All proposed tests should be prescribed within 2 – 3 working days. Email the HAT if the test is still showing as 'Proposed' in IHS.)
Prescribed (Adding requirement)	A test or a specialist opinion has been requested by the MA or HAT. The client needs to supply the required test or report.

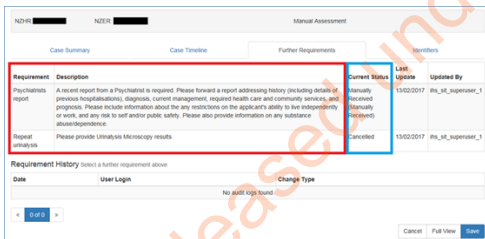
	(You should contact the client to advise them these tests are needed for their assessment to be completed).
Prescribed (Referred)	A test or a specialist opinion has been requested by the MA or HAT. The client's panel physician has referred the client to a specialist and they are now waiting to receive the test result. (You should follow up with the client to advise them these tests are needed for their assessment to be completed).
Received/Manually Received	The prescribed information has been received. (You should track the health case until the assessment is completed.)
Cancelled	The prescribed test or specialist report has been cancelled and is no longer required. If it has been Cancelled, then a Cancellation Reason will display in brackets e.g. 'Cancelled (Tests already provided)'. (Contact the HAT if necessary. No need to advise the client.)
Conditional	A test or a specialist opinion has been requested by the MA as part of an ASH with Conditions opinion (not yet submitted or prescribed). (Do not request conditional tests from client yet, unless there is a new visa application. Then you will need to reopen the health case to have HAT prescribe the conditional requirements if the application has been assessed. Update the Identifiers in the health case and inform the client regarding these new tests.) Note: The health case can be finalised by the HAT with a test still in a conditional state. Any tests left in a conditional state when the health case is finalised will remain in the health case as conditional if the outcome is. The health case status will become 'Assessed - ASH with Conditions' after it is finalised.

4. Determine if the health case information is sufficient to request further information from the client

Review the information in the 'Case Summary' and 'Further Requirements' tabs to determine if the information in the health case is sufficient to request further information from the client.

Check the status of the health case. Refer to [SOP Check the Health Case Status in IHS](#).

- If the health case status is 'Assessed', and further requirements need to be prescribed in IHS, then you will need to reopen the health case to prescribe the further requirements. Refer to [SOP Re-open a health case in IHS](#).
 - Update the health case Visa Details and Identifiers for the application. Add a Referral Note to request the HAT to prescribe the further requirements. Refer to [SOP Update the visa details in a health case in IHS](#).
 - Contact the client to advise them what is required to complete their health assessment.
- If the health case status is 'Manual Assessment', and further requirements need to be prescribed in IHS, then:
 - Update the health case Visa Details and Identifiers for the application. Add a Referral Note to request the HAT to prescribe the further requirements. Refer to [SOP Update the visa details in a health case in IHS](#).
 - Contact the client to advise them what is required to complete their health assessment.
- If the health case is 'Awaiting Further Requirements', then the further requirements have already been prescribed in IHS. You will need to follow up with the client to ensure they go to the panel physician to get all their tests completed.
- If you have received the results manually via email and the health case is 'Awaiting Further Requirements', you cannot attach the test result in IHS. You will need to email the HAT with the attachments. Refer to [SOP Communications to HAT](#).



If the information is...	Then...
Sufficient	Process ends. Refer to SOPs: Temporary: Request additional information. Manage missing mandatory documents(SMC) Family Category Residence: Request additional information (resident)
Not sufficient	Refer to SOP Accessing Health Case 'Full View' in IHS

End.

See Also

- [IHS and Health](#)
- [Immigration Health System Flowchart](#)
- [IHS Known issues](#)
- [Accessing Health Case 'Full View' in IHS](#)
- [Check the Health Case Status in IHS](#)

[Check the Health Assessment Outcome in IHS](#)

[Checking Medical Certificates in IHS](#)

[Searching for a Health Case in IHS](#)

[Re-open a health case in IHS](#)

[Put a health case on hold in IHS](#)

[Release a health case from on hold in IHS](#)

[Update the visa details in a health case in IHS](#)

[Update the email address on a health case in IHS](#)

[IHS Visa Details Cheatsheet](#)

[Client History Report](#)

[View the Client History Report](#)

[Client History Report Process](#)

[Communications to HAT](#)

[Recording Health Details in AMS](#)

[Managing the Health Status report for the Office](#)

[FAQ](#)

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Searching for a Health Case in IHS

When to use

To search and locate a health case in the Immigration Health System (IHS) for your client..

Role

- Support Officer, or
- Immigration Officer, or
- Customer Service Officer,
- Technical Advisor
- Immigration Manager.

Context

Medical and/or Chest x-ray certificates are submitted by a panel physician using eMedical, which are received in IHS and referred to as a health case.

References

Refer also to IHS training videos:

- [Search for a Health Case in IHS](#)
- [Health Case Tabs](#)
- [Updating the Identifiers tab](#)

Steps

1. Open IHS in your web browser

You can do this by double-clicking the shortcut on your computer desktop or opening the following link in your web browser:
<https://ihs.wd.govt.nz/>



Note: Single-sign-on will automatically log you onto IHS using MBIE network logon

2. If you need to manually logon to IHS follow this step, otherwise go to step 3.

To manually log on to IHS, enter your Ministry of Business Innovation and Employment (MBIE) email and password in the text fields provided and click 'Log in'

Immigration Health System

Note: You need to use your full domain login. For example, `firstname.surname@mbie.govt.nz`

Username

Password

Log in

3. Enter the health case reference number or client details in the corresponding text field(s) provided.

After logging in, you will be directed to the search page. Here you can search a client's health case by using any of the following parameters:

If...	Then...
You are searching for a specific health case	Enter either the NZHR or NZER in the corresponding text field.
No health case reference has been provided	<ul style="list-style-type: none"> • Enter an identity document number (in most cases a passport number) and the document's country of issue in the corresponding text fields; Or • Enter either the client's AMS client ID or AMS application number Or • Enter as a minimum, the client's family name and year of birth. (Search requires an exact match so you can add further detail to refine search results if a large number of results are returned.)
You are searching for multiple medical certificates for a client	Enter either the client's family name and date of birth, or client's family name with given name and date of birth

Note: Searching using an AMS client ID or AMS application number will only find health cases that have the AMS client ID or AMS application number saved as an identifier. Refer to the [IHS Manual: IO – Search screen](#) and [Search – Minimum Criteria](#).

Search Criteria

IHS Reference (NZHR)	<input type="text"/>	eMedical Reference (NZER)	<input type="text"/>
AMS Client Id	<input type="text"/>	Person Id	<input type="text"/>
Visa Application #	<input type="text"/>	Date of Birth	<input type="text"/> / <input type="text"/> / <input type="text"/>
Given Name	<input type="text"/>	Family Name	<input type="text"/>
Identity Document Number	<input type="text"/>	Identity Document Nationality	<input type="text"/>

Search Results

4. Click 'Search' to display the search results

If...	Then...
Only one existing health case is found against the search criteria	The IHS will automatically direct you to the health case Identifiers tab.
There are multiple existing health cases found against the search criteria	IHS will display a list of health cases relevant to the search criteria. <ul style="list-style-type: none"> Identify which health case you would like to view; then Click the associated NZHR number in the 'NZHR' column in the 'Search Results' table to open the health case. You will be directed to the health case 'Identifiers tab'.
If no matches are found	Repeat step 3 using different search criteria. To search for a client's previous health cases within IHS, use the Client History Report . If still no matches are found contact, HAT at HAT@mbie.govt.nz

Pro tip: Holding down the 'Ctrl' key on the keyboard when pressing the 'Enter' key will also generate the search.




5. Click the 'Case Summary' tab to view the health case details to determine if the health case belongs to your client

Important: To prevent any privacy breaches, it is important to ensure that the health case matches your client before you start using the information in the health case.

Scroll down to the 'Client Details' area and check that the information in this area matches your client.

- Check that the name, date of birth and country of birth from the health case matches the passport and application form.
- Check that the photo from the health case matches the passport and application form photos.

s9(2)(a) of the OIA Client History Assessed - ASH (Temporary)

Case Summary	Case Timeline	Further Requirements	Identifiers																																			
Case Status Assessed Medical Completion 25/07/2018 Manual Assessment No X-ray Supplied Yes Latest Assessment Conditions Latest Assessment Note Attachments Clinic Countries • Client Detl.pdf • Isle of Man	Assessment Outcome ASH (Temporary) Medical Expiry 25/10/2018 Medical Certificate General																																					
Location <table border="1"> <thead> <tr> <th>Clinic</th> <th>Country</th> <th>Date</th> <th>Question</th> <th>Answer</th> </tr> </thead> <tbody> <tr> <td>Medical History</td> <td></td> <td>25/07/2018</td> <td>Are you pregnant?</td> <td>No</td> </tr> <tr> <td>Medical History</td> <td></td> <td>25/07/2018</td> <td>Tuberculosis (TB), treatment for tuberculosis</td> <td>No</td> </tr> <tr> <td>Medical History</td> <td></td> <td>25/07/2018</td> <td>Close household contact with Tuberculosis</td> <td>No</td> </tr> <tr> <td>Medical Examination</td> <td></td> <td>24/07/2018</td> <td>Quarant</td> <td>#</td> </tr> <tr> <td>Chest X-ray Examination</td> <td></td> <td>24/07/2018</td> <td>Is the client pregnant?</td> <td>Yes</td> </tr> <tr> <td>Chest X-ray Examination</td> <td></td> <td>24/07/2018</td> <td>When does the client expect to give birth?</td> <td>03-Oct-2018</td> </tr> </tbody> </table>				Clinic	Country	Date	Question	Answer	Medical History		25/07/2018	Are you pregnant?	No	Medical History		25/07/2018	Tuberculosis (TB), treatment for tuberculosis	No	Medical History		25/07/2018	Close household contact with Tuberculosis	No	Medical Examination		24/07/2018	Quarant	#	Chest X-ray Examination		24/07/2018	Is the client pregnant?	Yes	Chest X-ray Examination		24/07/2018	When does the client expect to give birth?	03-Oct-2018
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Email Confirmation	Yes																																					

Determine your next step:

If the 'Client Details' information...	Then...
Does not match your client	Return to Step 3 and try another set of search criteria.
Matches your client	Go to next step.

6. Confirm the client's contact details

Scroll down in the 'Case Summary' tab to the 'Contact Details' section and check the client's contact details are correct.

It is important that you confirm that the email address listed is correct. (This email address is used to contact the client when further information requests are prescribed in IHS where the client has 'opted-in' to receive health related emails from INZ).

Refer to [SOP Update the email address on a health case in IHS](#).

If the client has 'opted-in' to the emails, there will be a 'Yes' in the 'Email Confirmation' field of the 'Client Details' section.

If the 'Email Confirmation' is 'No', then the client will not receive emails from IHS. The IO will need to contact the client where any health requirements are needed).

Client Details

Name	s9(2)(a) of the OIA	Date of Birth	s9(2)(a) of the OIA
Sex	FEMALE	Age at Medical Completion	s9(2)(a) of the OIA
Country of Birth	Belarus	Partial DoB	No
Client Declaration	Yes	Guardian	
Country of Citizenship		Guardian Relationship	
Email Confirmation	Yes		

Contact Details

Addresses

Telephone Numbers

Email Addresses
s9(2)(a) of the OIA

7. Update the 'Identifiers' in the health case

Note: It is important that the Visa Details and application identifiers are updated if you are using the health case for the visa application that you are lodging or assessing.

Return to the 'Identifiers' tab to update the Visa Details and application identifiers of the health case if you are using the health case for a visa application, or click the edit icon on the Visa Details section at the bottom of the Case Summary tab.

Enter AMS application identifiers (e.g. AMS Client ID, AMS Visa Application number) and update all the relevant Visa Details fields (Visa Category, Visa Type, Referral Type, and Length of Stay) to match the visa application that you are lodging or assessing. Add into the 'Referral Note' field the reason why you are updating the health case and what you want the HAT or MA to do next. This is instead of emailing the HAT.

When all fields have been updated, click 'Save'.

Important note: When updating the visa details do not use any with the clock icon. If the Visa Category and Visa Type are already populated but have a clock icon, then you must update these fields to one of the new options.

Refer to [SOP Update the visa details in a health case in IHS](#) and training video [Updating the Identifiers tab on how to do this](#).
Refer also to the [IHS Manual: IO — Identifiers tab](#) and [Edit Visa Details](#).

Next steps

Review the health case to determine if the medicals meet the Immigration health requirements for the decision about a client's status of health for a visa application:

1. Check what medical certificates are included in a health case in IHS to ensure they meet the health requirements for the application. Refer to [SOP Checking Medical Certificates in IHS](#).
2. Check the status of the health case to see if it has been assessed. Refer to [SOP Check the health case status](#).
3. Check the assessment outcome of the medical and/or chest x-ray certificates included in a health case. Refer to [SOP Check the Health Assessment Outcome in IHS](#).
4. It is very important to review the client's previous health history information and take this into account when making Immigration decisions about a client's status of health for a visa application. To search for a client's previous health cases within IHS, use the Client History Report. See [SOP Access the Client History Report](#) and [View the Client History Report](#) for more information on how to do this.

End

See Also

- [IHS and Health](#)
- [Immigration Health System Flowchart](#)
- [IHS Known issues](#)
- [Accessing Health Case 'Full View' in IHS](#)
- [Check the Health Case Status in IHS](#)
- [Check the Health Assessment Outcome in IHS](#)
- [Checking Medical Certificates in IHS](#)
- [Determine Further Requirements for a Health Case](#)
- [Re-open a health case in IHS](#)
- [Put a health case on hold in IHS](#)
- [Release a health case from on hold in IHS](#)
- [Update the visa details in a health case in IHS](#)
- [Update the email address on a health case in IHS](#)
- [IHS Visa Details Cheatsheet](#)
- [Client History Report](#)
- [View the Client History Report](#)
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- [Recording Health Details in AMS](#)
- [Managing the Health Status report for the Office](#)
- [FAQ](#)
- [IHS Training Videos](#)
- [Immigration Health System \(HAT\)](#)
- [Hidden Footnotes](#)

Released under the Official Information Act 1982

Re-open a health case in IHS

When to use

Use this procedure to re-open an assessed health case in the Immigration Health System (IHS) for a new assessment.

Note: This replaces the current process to email the HAT to re-open an existing health case when a new visa application is accepted in AMS.

Who is responsible?

Any INZ visa application processing staff with IO user access in IHS:

- Support Officer (SO)
- Immigration Officer (IO)
- Technical Advisor (TA)
- Customer Services Officer (CSO)
- Immigration Manager (IM)

When

During lodgement or determination of a visa application that requires medicals.

Context

A previously assessed health case may need to be re-opened if further information has been received that could affect its status.

This scenario may occur if, for example, the health case was assessed under temporary criteria and now needs to be assessed against residence criteria or the applicant's health status has changed since the last outcome so their health status needs to be re-determined.

Note: You can re-open a health case in either the IO standard default view in IHS or in Full View. You must update the details in the 'Identifiers' tab first.

When you re-open a health case, a dropdown box will display reasons for re-opening a health case which includes the following options:

- Applicant's health circumstances have changed
- New visa application requiring assessment under different referral category
- Previous health outcome of 'ASH with Conditions'
- Previous health outcome of 'Incomplete' and new visa application accepted
- Disputing/deferral information received
- Expired medical – IO accepting as ETI
- Other

If 'Other' is the selected reason, a comments box will be displayed for the IO to provide the re-opening reason for further instructions for the HAT. This is instead of emailing the HAT. The details you add in the Referral Note will inform the HAT or MA of why you have re-opened the health case and what needs to happen next.

You may also upload attachments to the health case once you have re-opened it. This step is mandatory if further information has been received from the applicant.

References

Refer to:

SOP [Searching for a Health Case in IHS](#), [Check the Health Assessment Outcome in IHS](#), [Update the visa details in a health case](#).

FAQs: [FAQs - Re-opening health cases in IHS](#), [FAQs - 'Auto-Assessed' health cases](#), [FAQs - Visa Details in IHS](#), [FAQs - Health deferrals in IHS](#)

IHS Manual [☞]: [Re-open Health Case](#) [☞], [Edit Visa Details](#) [☞], and [Add Attachments](#) [☞]

Training video: [IO Reopen Health Case](#).

Pre-requisites

You have:

- received further information that triggers a re-assessment of an applicant's health status.
- located the health case in IHS for your client.
- checked the health case status and it is in an 'Assessed' state.

Important Note: You should only re-open an 'Assessed - Incomplete' health case if it's INZ's mistake e.g. the applicant provides a medical but the application was decided and HAT finalised the health case as incomplete. When the client re-applies, the IO should confirm if the health case still meets the 3 months validity period before re-opening the 'Incomplete' health case as the medical should have been referred.

Before you start

Search in IHS and locate the relevant health case for your client. Refer to SOP [Searching for a Health Case in IHS](#).

You can use the [Client History Report in IHS](#) to find the matching health cases for your client.

When you have located a health case in IHS, it will open in the Identifiers tab of the health case.

Important Note: Ensure that you have located the correct health case for the correct client before you proceed with updating any of the details and re-opening the health case.

Steps

1. Review the health case and health assessment criteria

Review the details of the latest health assessment to check if the health case needs to be re-assessed under different criteria. This will confirm if you need to re-open the health case or not.

Before you continue, you must confirm that:

- the medical certificate and/or chest x-ray in the health case can be accepted for the new application, and
- the health case needs to be re-assessed for the visa application you are lodging or assessing.

Important Note: You should check against the immigration instructions for the application you are lodging or assessing to confirm whether a new medical certificate / chest x-ray needs to be requested or not.

First determine if the medical is still valid, then if it has been auto-assessed or not:

- If the medical has expired, there is no need to re-open the health case unless the information is important. OR the expired medical is accepted by the IO as an ETI.
- If the medical is still valid, then check if the health case is auto-assessed as ASH or ASH with conditions (the auto-cleared assessment can be applied to your application without reopening the health case).
- If the health case is not auto-assessed, then check the Outcome History in the Case Timeline tab and determine whether to re-open the health case or not.

Refer to SOPs [Checking Medical Certificates in IHS](#) and [Check the Health Assessment Outcome in IHS](#).

Does the health case assessment meet the health criteria for the type of visa application you are lodging or assessing? Determine your next step:

- If Yes, then you do not need to re-open the health case and can use the health case for the visa you are lodging or assessing.
- If No, then go to next step.

2. Update the visa application details

Refer to [SOP Update the visa details in a health case in IHS](#).

Check the visa application details (application identifiers, and the visa and referral details) are correct for the application you are processing or assessing.

These are the details within these fields in the Identifiers tab:

- AMS Client Id
- Visa Application #
- Person Id
- Visa Category
- Visa Type
- Length of Stay (for Temporary only)
- Referral Type
- Referral Note

Update these fields in the 'Identifiers' tab as required.

If the visa details are all present and / or correct, then skip this step.

Update the details if any of the visa application details are not populated (i.e. they are blank) or they are incorrect for the visa application being lodged or assessed.

Add a 'Referral Note' with the request to re-refer the health case to a Medical Assessor. This is to advise the HAT or MA of what you need done next for the health case, for example, to describe that new information is attached, or previous ASH with conditions tests need to be prescribed.

Click 'Save' to save your changes. Saving the visa detail changes (even if they have not been changed) will activate the 'Re-open' button in the Quick Access toolbar.

Important Note: You can only re-open a health case if all the information required for a referral has been provided i.e. all the mandatory visa application details are present: AMS Application number, Client Id, Visa Category, Visa Type, Referral Type and Referral Note. These can be updated if required in the Identifiers tab. See the [IHS Manual: Edit Visa Details](#) section for details.

You can also re-open the health case from the Case Summary tab. Refer to the [IHS Manual: Re-open Health Case](#).

3. Re-open the health case

Select the necessary re-open reason for your health case.

Refer to [FAQs - Re-opening health cases in IHS](#).

Select the 'Reopen' button from the Quick access menu at the bottom of the Identifiers tab.

A drop down box will display the possible reasons that an IO can choose from when re-opening the health case. Refer to [FAQs - Re-opening health cases in IHS](#) for further details of when to use each specific re-open reason:

If 'Other' is selected as the Re-open reason, a comments box will display for the IO to state a re-open reason or any further details for the HAT.

Note: The reopen button will only be active if you have provided all the information required for a referral i.e. all the mandatory visa application details are present. They can be updated if required in the Identifiers tab. See the [IHS Manual: Edit Visa Details](#) section for details.

You can also re-open the health case from the Case Summary tab. Refer to the [IHS Manual: Re-open Health Case](#).

4. Add attachments (This step is mandatory if further information has been received from the applicant).

Once you have re-opened the health case, you can also add attachments directly into the health case in IHS. This is instead of emailing the information to the HAT.

Before you upload any attachments, check that the documents are:

- medical related only (i.e. they do not include any non-health related information e.g. personal health insurance policy) and are from a medical professional
- all correct (are in English or English translation has been provided), are complete (e.g. they have all the pages and are legible);
- for the correct client and the correct health case.

If you are not sure about whether to upload a document, talk to your TA/IM first.

Note: Attachments can only be added to the health case after it has been re-opened and transitioned into a 'Manual Assessment' state. To upload the attachments, you must be the IO user who re-opened the health case. You may only add attachments at the time you re-open the health case. This action can do be done in standard or full view. Refer to [FAQs - Add attachments to a health case](#).

To upload the new documents (one at a time), click the Attachments 'Browse' option at the bottom of the health case in the Identifiers tab.

Browse to the folder where the documents are and select Open.

In IHS click the 'Upload' button

Attachments

Note: You can view the attachments in the Case Summary tab while in standard view. However, you will need to be in Full View to open the attachments. Refer to [SOP Accessing Health Case 'Full View' in IHS](#).
Important note: Once the documents are uploaded, you will not be able to delete or download them. If the documents uploaded are incorrect, you will need to contact the HAT (at HAT@mbie.govt.nz) to remove them from the health case. Refer to [SOP Sending communications to the HAT](#) in the Global Process Manual under IHS and Health for details on how to do this.

Process ends.

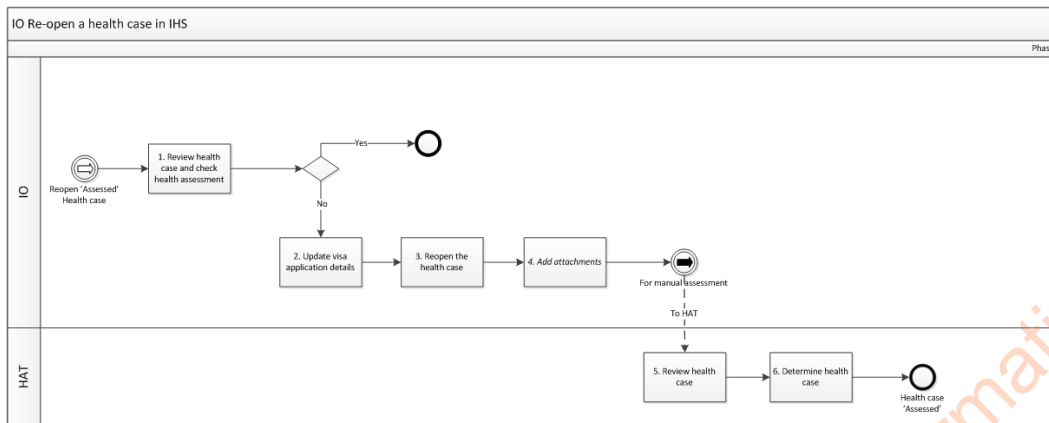
Next steps

After the health case is re-opened, it will be automatically forwarded to the HAT workflow queue for manual assessment. The HAT will determine if the health case needs to be assessed by a Medical Assessor or if they can clear it.

Track the status of the health case to check when it has been assessed. Check the Health Status Report for updates. Refer to [SOP Managing the Health Status report for the Office](#). Follow up with HAT as required.

Re-open a health case in IHS process map

High-level process to re-open a health case in IHS.



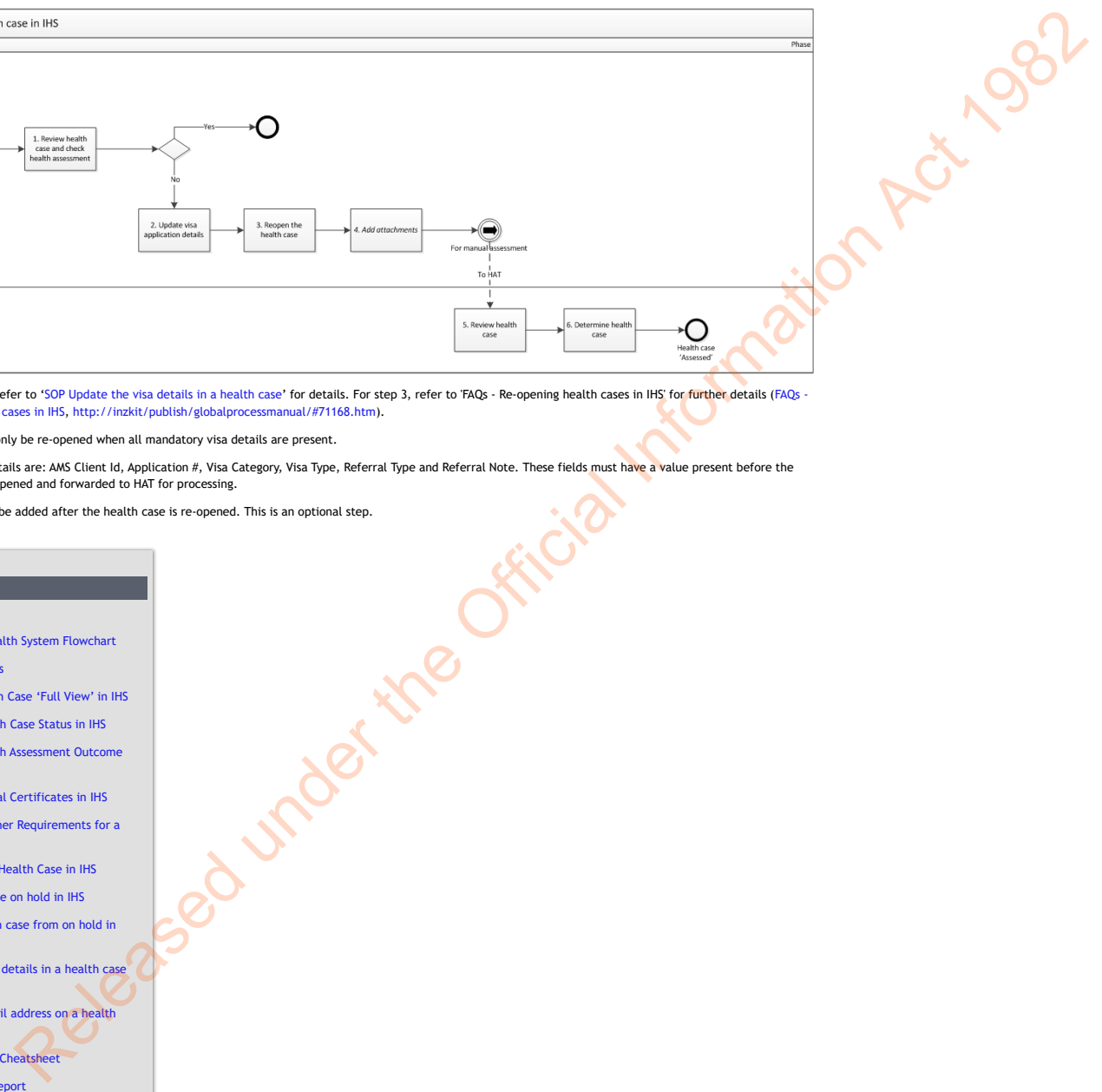
Note: For Step 2, refer to ['SOP Update the visa details in a health case'](#) for details. For step 3, refer to ['FAQs - Re-opening health cases in IHS'](#) for further details ([FAQs - Re-opening health cases in IHS](#), <http://inzklt/publish/globalprocessmanual/#71168.htm>).

Health cases can only be re-opened when all mandatory visa details are present.

Mandatory visa details are: AMS Client Id, Application #, Visa Category, Visa Type, Referral Type and Referral Note. These fields must have a value present before the health case is re-opened and forwarded to HAT for processing.

Attachments may be added after the health case is re-opened. This is an optional step.

- See Also**
- [IHS and Health](#)
 - [Immigration Health System Flowchart](#)
 - [IHS Known issues](#)
 - [Accessing Health Case 'Full View' in IHS](#)
 - [Check the Health Case Status in IHS](#)
 - [Check the Health Assessment Outcome in IHS](#)
 - [Checking Medical Certificates in IHS](#)
 - [Determine Further Requirements for a Health Case](#)
 - [Searching for a Health Case in IHS](#)
 - [Put a health case on hold in IHS](#)
 - [Release a health case from on hold in IHS](#)
 - [Update the visa details in a health case in IHS](#)
 - [Update the email address on a health case in IHS](#)
 - [IHS Visa Details Cheatsheet](#)
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 - [Managing the Health Status report for the Office](#)
 - [FAQ](#)
 - [IHS Training Videos](#)
 - [Immigration Health System \(HAT\)](#)
 - [Hidden Footnotes](#)



Put a health case on hold in IHS

When to use

Use this procedure to manually put a health case on hold or to release it from hold in order to let the health assessment proceed.

Note: This is instead of emailing HAT when a visa application is awaiting further information.

Who is responsible?

Any INZ visa application processing staff with IO user access in IHS:

- Support Officer (SO)
- Immigration Officer (IO)
- Technical Advisor (TA)
- Customer Services Officer (CSO)
- Immigration Manager (IM)

Note: A HAT, IO or IHS Business Admin user can all place a health case on hold. This SOP describes the process for an IO user.

When

During lodgement or determination of a visa application that requires medicals.

Context

A health case can be put on hold automatically by IHS or manually by an IO, a HAT or an IHS a Business Admin user.

If placing a health case on hold, you can only do this when the health case is in a 'Manual Assessment' state.

The hold process will take a health case out of the IHS workflow to temporarily stop the health assessment process and place it on hold while waiting for further actions or information from others.

Important Note: The 'Hold' state is different from the 'Awaiting Further Requirements' state. The latter state means that the HAT or a MA have requested further information from the applicant, such as further exams or test results, while the 'Hold' state indicates that we are awaiting information, most likely from within INZ. For example, we are waiting for the applicant to lodge the visa application before proceeding with the health assessment.

References

Refer to:

- FAQs: [FAQs – Visa Details in IHS](#), [FAQs - Add attachments to a health case](#) and [FAQs - Hold or Release a health case in IHS](#).
- IHS Manual: [IO – Search screen](#), [Hold](#), [Release](#), [IO – Identifiers tab](#), [Edit Visa Details](#) and [Add Attachment](#).
- SOPs: [Release a health case from on hold in IHS](#) and [Update the visa details in a health case in IHS](#)
- Training video: [IO Hold and Release a Health Case](#).

Pre-requisites

You have an action to temporarily stop a health case from being assessed.

Steps

1. Locate the health case in IHS

Search in IHS and locate the relevant health case for your client. Refer to SOP [Searching for a Health Case in IHS](#).

You can also use the [Client History Report in IHS](#) to find the matching health cases for your client.

When you have located the health case in IHS, it will open in the Identifiers tab. This is the first screen that appears when you find the health case in IHS as an IO user.

Important Note: Ensure that you have located the correct health case for the correct client before you proceed with updating any of the details.

2. Review the health case and check health case state

Refer to SOP [Check the Health Case Status in IHS](#).

You must review the health case and confirm that the health case is in 'Manual Assessment' state.

Do this by checking in the grey banner at the top of the health case.

Determine your next step:

If the health case state is	then
'Manual Assessment'	Go to next step.
not 'Manual Assessment'	Process ends.

Note: If the health case is not in a 'Manual Assessment' state and you need to stop the health case assessment for any reason, such as the visa application is withdrawn or declined, then you will need to contact the Health Assessment Team (HAT) at HAT@mbie.govt.nz. Refer to SOP [Communications to HAT](#). You do not need to advise HAT if the health case has already been assessed.

3. Update the visa application details

Check the visa application details (application identifiers, and the visa and referral details) are correct for the application you are processing or assessing. These are the details within these fields in the Identifiers tab:

- AMS Client Id
- Visa Application #
- Person Id
- Visa Category
- Visa Type
- Length of Stay (for Temporary only)

- Referral Type
- Referral Note*

s9(2)(a) of the OIA Client History Manual Assessment

Case Summary Case Timeline Further Requirements Identifiers

Identifiers

Please note that other Application Identifiers have previously been saved to this health case. Go to the Case Timeline tab to view this history.

AMS Client Id	3
Visa Application #	4
Person Id	5
Visa Category	Residence
Visa Type	Humanitarian Other
Length of Stay	Permanently
Referral Type	Limited
Referral Note	759

This text is configurable...

Cancel Full View Hold Save

Update these fields if required. Refer to [SOP Update the visa details in a health case in IHS](#).
If they are present and correct, then skip this step. Go to step 4.

Note: This is an optional step and only needs to be actioned if any of the visa application details shown in the Identifiers tab are not populated (i.e. they are blank) or they are incorrect (including if they are older visa categories and need to be updated to the new ones) for the visa application being lodged or assessed.
Important Note: If you are updating the visa details then you must include details of the reason why in the 'Referral Note' field. The details you add in the Referral Note inform the HAT or MA what needs to happen next for the health case. This is instead of emailing the HAT.

4. Put the health case on hold

To place the health case on hold, click the 'Hold' button in the Quick Access Menu at the bottom of the health case screen:

Cancel Full View Hold Save

5. Select a hold reason and Save

Determine the reason for placing the health case on hold:

If the health case is...	then
pending a visa application acceptance	the health case needs to wait until the visa application is accepted before a health assessment can proceed. Select the hold reason: <ul style="list-style-type: none"> • 'Medical Opinion held pending visa application acceptance'.
pending information from IO	the health case needs to wait until the information is received from the IO (such as a declaration or a client identity resolution) before a health assessment can proceed. Select the hold reason: <ul style="list-style-type: none"> • 'Manual Assessment held pending information from IO'.
Pending ID resolution	the health case needs to wait until the IO has resolved the identity concern raised in the health case by the panel physician before a health assessment can proceed. Select the hold reason: <ul style="list-style-type: none"> • 'Manual Assessment held pending ID resolution'

Important Note: The hold reason will indicate what the next state of the health case will be when it is released from on hold i.e. where it will go next:
- If you select a hold reason that is prefixed with 'Manual Assessment', when the health case is released from hold it will go back to Manual Assessment. You can also add attachments when it is on hold before it is released.
- If you select a hold reason that is prefixed with 'Medical Opinion', when the health case is released from hold it will go to Medical Opinion. You cannot add attachments when it is on hold for this reason.

Select the correct reason for putting the case on hold from the Reason drop-down list in the 'Hold Case' pop-up box.

Then click the 'Save' button to confirm the hold action:

Hold Case

Reason: Medical Opinion held pending visa application acceptance

Cancel Save

When the health case has been saved, the health case state will show as 'Hold' in the grey banner at the top of the screen.

s9(2)(a) of the OIA Client History **Hold**

Case Summary Case Timeline Further Requirements

Identifiers

Note: The 'Hold' button in the Quick Access Menu will change to a 'Release' button when the health case is on hold.
The State Transition History table in the Case Timeline tab of the health case will also show that the health case has transitioned from 'Manual Assessment' to 'Hold'. The latest transition is at the top of the table. It will also show the hold reason, the date it was placed on hold and who placed it on hold.

From	To	Date	Username
Manual Assessment	Hold	2019/2019 14:49	ih_hl_x1

Determine your next step:

If there is...	then
Further information received to be added to the health case	You can add the further information as attachments. If all outstanding information is received, then you can add attachments and then release the health case from on hold. Go to step 7 to 'Add attachments'.

No other action to be done	Process ends.
----------------------------	---------------

- Add attachments (This step is optional).

When a health case is on hold, you can add attachments directly into IHS but only if the Hold Reason is 'Manual Assessment held pending information from IO'. This is instead of emailing the information to the HAT.

Important note: It is good practice for you to add attachments only when you are going to release the health case from on hold.

Before you upload any attachments, please check that they are the correct attachments for the correct health case and are:

- medical related only (i.e. they do not include any non-health related information and are from a medical professional);
- all complete (e.g. they have all the pages and are legible);
- for the correct client.

If you are not sure about whether to upload a document to a health case, then talk to your TA or IM first.

Note: Attachments cannot be added to a health case after it has been placed on hold for the Hold Reason is 'Medical Opinion held pending visa acceptance'.

s9(2)(a) of the OIA

Client History Hold

Case Summary

Case Timeline

Further Requirements

Identifiers

Identifiers

Please note that other Application Identifiers have previously been saved to this health case. Go to the Case Timeline tab to view this history.

AMS Client Id

Visa Application #

Person Id

Visa Category

Visa Type

Length of Stay

Referral Type

Referral Note

Attachments

Upload the new documents (one at a time).

At the bottom of the health case, click Attachments 'Browse'.

Browse to the folder where the documents are and select Open.

In IHS, click the 'Upload' button.

Attachments

Note: You can view the attachments in the Case Summary tab while in standard view. However, you will need to change to Full View to open any attachments. Refer to SOP Accessing Health Case 'Full View' in IHS.

Important note: Once the documents are uploaded, you will not be able to delete or download them. If the documents uploaded are incorrect, you will need to contact the HAT (at HAT@mbie.govt.nz) to remove them from the health case. Refer to SOP Sending communications to the HAT in the Global Process Manual under IHS and Health for details on how to do this.

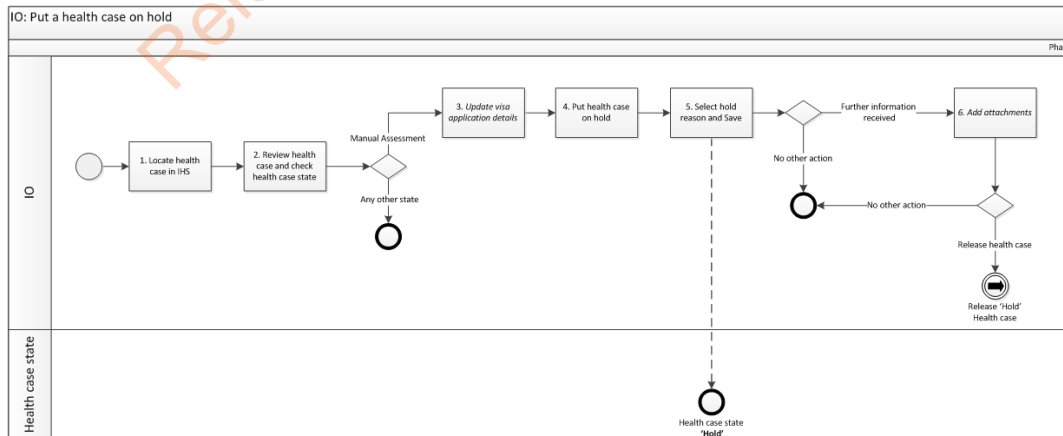
Process ends.

Next steps

Release the health case from on hold. Refer to SOP Release a health case from on hold in IHS.

Put a health case on hold in IHS process map

The following is the high-level process map, showing the steps for putting a health case on hold, including updating the visa application details in a health and the actions that can follow:



Note: 'Update visa application details' and 'Add attachments' are optional steps during this process.

'Add attachments': You can add attachments directly into IHS while the case is on hold, before you release it, but only if the Hold Reason is Manual Assessment held pending information from IO'. You cannot add attachments to a health case if the Hold Reason is Medical Opinion held pending visa acceptance'.

See Also

- [IHS and Health](#)
- [Immigration Health System Flowchart](#)
- [IHS Known issues](#)
- [Accessing Health Case 'Full View' in IHS](#)
- [Check the Health Case Status in IHS](#)
- [Check the Health Assessment Outcome in IHS](#)
- [Checking Medical Certificates in IHS](#)
- [Determine Further Requirements for a Health Case](#)
- [Searching for a Health Case in IHS](#)
- [Re-open a health case in IHS](#)
- [Release a health case from on hold in IHS](#)
- [Update the visa details in a health case in IHS](#)
- [Update the email address on a health case in IHS](#)
- [IHS Visa Details Cheatsheet](#)
- [Client History Report](#)
- [View the Client History Report](#)
- [Client History Report Process](#)
- [Communications to HAT](#)
- [Recording Health Details in AMS](#)
- [Managing the Health Status report for the Office](#)
- [FAQ](#)
- [IHS Training Videos](#)
- [Immigration Health System \(HAT\)](#)
- [Hidden Footnotes](#)

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Release a health case from on hold in IHS

When to use

Use this procedure to release a health case from hold in order to let the health assessment proceed.

Note: This is instead of emailing HAT when outstanding further actions or information from others have been received.

Who is responsible?

Any INZ visa application processing staff with IO user access in IHS:

- Support Officer (SO)
- Immigration Officer (IO)
- Technical Advisor (TA)
- Customer Services Officer (CSO)
- Immigration Manager (IM)

Note: A HAT, IO or IHS Business Admin user can release a health case from hold.

This SOP describes the process for an IO user in IHS.

When

During lodgement or determination of a visa application that requires medicals.

Context

A health case can be released from hold automatically by IHS or manually by an IO, a HAT or an IHS Business Admin user.

A health case will be released from hold when the reason for the hold is no longer valid. For example, because the further actions have been completed or the further information requested has now been received.

The release from hold process will take a health case from hold and put it back into the IHS workflow to proceed with the health assessment process.

A health case must be in a 'Hold' state before it can be released from hold.

Note: The 'Hold' state is different from the 'Awaiting Further Requirements' state. The latter state means that the HAT or a MA have requested further information from the applicant, such as further exams or test results, while the 'Hold' state indicates that we are awaiting information, most likely from within INZ. For example, we are waiting for the applicant to lodge the visa application before proceeding with the health assessment.

References

Refer to:

- FAQs: [FAQs – Visa Details in IHS](#), [FAQs - Add attachments to a health case](#) and [FAQs - Hold or Release a health case in IHS](#).
- IHS Manual: [IO – Search screen](#), [Hold](#), [Release](#), [IO – Identifiers tab](#), [Edit Visa Details](#), and [Add Attachments](#).
- SOPs: [Update visa details in a health case](#) and [Put a health case on hold](#).
- Training video: [IO Hold and Release a Health Case](#).

Pre-requisite

You have an action to release a health case from hold so that it can be assessed.

Steps

1. Locate the health case in IHS

Search in IHS and locate the relevant health case for your client.

Refer to [SOP Searching for a Health Case in IHS](#).

You can use the [Client History Report in IHS](#) to find the matching health cases for your client.

When you have located a health case in IHS, it will open in the Identifiers tab of the health case.

Important Note: Ensure that you have located the correct health case for the correct client before you proceed with updating any of the details.

2. Review the health case and check health case state

Refer to [SOP Check the Health Case Status in IHS](#).

You must review the health case and confirm that the health case is in 'Hold' state.

Do this by checking in the grey banner at the top of the health case.

Identifiers

Please note that other Application Identifiers have previously been saved to this health case. Go to the Case Timeline tab to view this history.

AMS Client Id	3
Visa Application #	4
Person Id	5

Determine your next step:

If the health case is	then
in a 'Hold' state	Go to next step.
not in a 'Hold' state	Process ends.

3. Check the reason it is on hold.

Check the reason the health case is on hold. This will advise you what type of information is required to be added to the health case before it can be assessed.

You can view the reason a health case was put on hold within the State Transition History table of the Case Timeline tab.

This one below shows that it needs the visa application to be accepted before it can be assessed.

State Transition History

From	To	Date	Username
Manual Assessment	Hold	20/05/2016 14:40	RL_ML_01

Medical Opinion held pending visa application acceptance

Note: You will only be able to upload attachments if the Hold Reason is 'Manual Assessment held pending information from

IO'.

4. Update the visa application details

Check the visa application details (application identifiers, and the visa and referral details) are correct for the application you are processing or assessing.

These are the details within these fields in the 'Identifiers' tab:

- AMS Client Id
- Visa Application #
- Person Id
- Visa Category
- Visa Type
- Length of Stay (for Temporary only)
- Referral Type
- Referral Note*

Update these fields if they are not present or are incorrect as required.

Refer to [SOP Update the visa details in a health case in IHS](#).

Note: You will only be able to release a case from on hold if the AMS Client Id, Visa Application #, Visa Category, Visa Type, and Referral Type are all present in the health case.

Important Note: You must include details of the reason why you are releasing the health case in the 'Referral Note' field. The details you add in the Referral Note inform the HAT or MA what needs to happen next for the health case. This is instead of emailing the HAT.

s9(2)(a) of the OIA

Client History Hold

Case Summary Case Timeline Further Requirements Identifiers

Identifiers

Please note that other Application Identifiers have previously been saved to this health case. Go to the Case Timeline tab to view this history.

AMS Client Id 12

Visa Application # 11

Person Id

Visa Category Temporary

Visa Type Student

Length of Stay More than 24 months

Referral Type General

Referral Note

Attachments Clear Upload Browse...

Cancel Full View Release Save

Click 'Save' to save your changes to the visa details.

Cancel Full View Release Save

Note: This is an optional step and only needs to be actioned if the Visa Details shown in the Identifiers tab are either not populated (i.e. they are blank) or are incorrect for the visa application being processed.

5. Add attachments (This step is optional)

You can add attachments directly into IHS while the case is on hold, **before you release it**, but only if the Hold Reason is 'Manual Assessment held pending information from IO'. This is instead of emailing the information to the HAT.

Before you upload any attachments, please check that they are the correct attachments for the correct health case and are:

- medical related only (i.e. they do not include any non-health related information and are from a medical professional);
- all complete (e.g. they have all the pages and are legible);
- for the correct client.

If you are not sure about whether to upload a document to a health case, then talk to your TA or IM first.

Note: Attachments cannot be added to a health case after it has been placed on hold for the Hold Reason is 'Medical Opinion held pending visa acceptance'.

Upload the new documents (one at a time). At the bottom of the health case, click Attachments 'Browse'.

Browse to the folder where the documents are and select Open.

In IHS, click the 'Upload' button.

Attachments Browse...

Clear Upload

Note: You can view the attachments in the Case Summary tab while in standard view. However, you will need to change to Full View to open any attachments. Refer to [SOP Accessing Health Case 'Full View' in IHS](#).

Important note: Once the documents are uploaded, you will not be able to delete or download them. If the documents uploaded are incorrect, you will need to contact the HAT (at HAT@mbie.govt.nz) to remove them from the health case. Refer to [SOP Sending communications to the HAT in the Global Process Manual under IHS and Health](#) for details on how to do this.

6. Release the health case from on hold

Click the 'Release' button in the Quick Access Menu at the bottom of the health case screen:

Cancel Full View Release Save

You do not need to select 'Save' again.

Process ends.

Next steps

When released from hold, the hold reason will indicate where the health case will go next:

- The 'Medical Opinion held pending visa application acceptance' reason means that it will go to the state of 'Medical Opinion' for a MA to do the assessment when it is released from hold.
- The 'Manual Assessment' held pending information from IO' reason means that it will go to the state of 'Manual Assessment' for the HAT to do the assessment when it is released from hold.
- The 'Manual Assessment held pending ID resolution' reason means that it will go to the state of 'Manual Assessment' for the HAT to do the assessment when it is released from hold.

You can view the process a health case moves out on hold within the Case Timeline History table of the Case Timeline tab.

You can view the reason a health case was put on hold within the State Transition History table of the Case Timeline tab.

This example below shows that the health case released from hold is now in a 'Medical Opinion' state.

s9(2)(a) of the OIA Client History Medical Opinion

Case Summary	Case Timeline	Further Requirements	Identifiers
Case Status	Medical Opinion	Assessment Outcome	Manual Assessment Required
Medical Completion	23/05/2018	Medical Expiry	23/09/2018
Manual Assessment	Yes	Medical Certificate	Limited
X-ray Supplied	Yes		

In the Case Timeline tab, the State Transition History table shows why it transitioned to a 'Medical Opinion' state when released from 'Hold'. The reason it was placed on hold was for 'Medical Opinion held pending visa application acceptance' reason. A Medical Assessor can now complete the medical assessment.

State Transition History

From	To	Date	Username
Hold	Medical Opinion	20/09/2018 14:57	ihm_hl_r_1
Manual Assessment	Hold	20/09/2018 14:49	ihm_hl_r_1
Medical Opinion held pending visa application acceptance			

In the other hold reason scenarios ('Manual Assessment held pending information from IO' or 'Manual Assessment held pending ID resolution' reasons) the health case will be automatically forwarded to the HAT for manual assessment instead. The health case will show that it is in a 'Manual Assessment' state.

Release a health case from on hold in IHS process map

Click [here](#) for the Release a health case from hold in IHS process map.

See Also

- [IHS and Health](#)
- [Immigration Health System Flowchart](#)
- [IHS Known issues](#)
- [Accessing Health Case 'Full View' in IHS](#)
- [Check the Health Case Status in IHS](#)
- [Check the Health Assessment Outcome in IHS](#)
- [Checking Medical Certificates in IHS](#)
- [Determine Further Requirements for a Health Case](#)
- [Searching for a Health Case in IHS](#)
- [Re-open a health case in IHS](#)
- [Put a health case on hold in IHS](#)
- [Update the visa details in a health case in IHS](#)
- [Update the email address on a health case in IHS](#)
- [IHS Visa Details Cheatsheet](#)
- [Client History Report](#)
- [View the Client History Report](#)
- [Client History Report Process](#)
- [Communications to HAT](#)
- [Recording Health Details in AMS](#)
- [Managing the Health Status report for the Office](#)
- [FAQ](#)
- [IHS Training Videos](#)
- [Immigration Health System \(HAT\)](#)
- [Hidden Footnotes](#)

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Update the visa details in a health case in IHS

When to use

Use this procedure to add a new visa application details of a health case within the Immigration Health System (IHS) when a new visa application is received.

Note: This replaces the current process to email the HAT when a new visa application is accepted in AMS.

Who is responsible?

Any INZ visa application processing staff with IO user access in IHS:

- Support Officer (SO)
- Immigration Officer (IO)
- Technical Advisor (TA)
- Customer Services Officer (CSO)
- Immigration Manager (IM)

When

During lodgement or determination of a visa application that requires medicals.

Context

As part of the health assessment to determine an applicant's health status for a visa application, specific details about that application are required to be entered within the related health case in IHS.

This scenario may occur if, for example, a health case needs to be:

- assessed using different criteria from what was provided by the client when the health case was submitted in eMedical or
- reassessed under different criteria from what it was previously assessed.

The application details (Application Id, Application Source, Application Date, Visa Category, Visa Type, Length of Stay, and Intended Work Activity fields) should be updated with the new visa application details to be used for the assessment of the health case so that there is a defined link between the health case and a corresponding application in AMS. These fields also facilitate the data warehouse 'Health case status update report'.

Additional visa and referral details fields (specifically the AMS Client ID, Referral Type and Referral Note) must be present in a health case so that it can be assessed against the correct criteria for the new visa application.

Application Id, Application Source, Application Date, Visa Category, Visa Type and Length of Stay (for Temporary applications only) are all mandatory fields.

The Visa Categories to select from are: Temporary, Residence or Work to Residence. The Visa Types available for selection in IHS depend upon the Visa Category selected as shown in the table below:

Visa Category	Visa Type
Temporary	Visitor
	Student
	Worker with job offer
	Worker without job offer
Residence	Skilled / Business
	Pacific Categories
	Family
	Humanitarian UNHCR
	Humanitarian other
Christchurch Response (2019)	
Work to Residence	Worker
	Family of worker

Referral Types are:

- General
- Limited.

If what is shown in the visa and referral fields are incorrect (they are older categories with the clock icon, or the fields are blank), then you must update them by selecting one of the new categories from the top of the drop-down lists. Refer SOP Update the visa details in a health case in IHS and [IHS Visa Details Cheatsheet](#) for guidance.

Visa details and Application details must be entered / updated as part of the following processes:

- Re-open a health case
- Release a health case from on hold

Visa details may also be entered / updated during the following process:

- Put a health case on hold

Refer to SOPs [Reopen a health case in IHS](#), [Put a health case on hold](#), and [Release a health case from on hold](#).

Note: All actions to update the visa details and application details in a health case can be undertaken in the IO default view i.e. you do not need to be in the Full View.

You may update the visa details and application details in a health case in any health case.

Pre-requisites

You have:

- received a new visa application from a client;
- an action to update the new visa details and application details in the corresponding health case.

Steps

1. Locate the health case in IHS

Search in IHS and locate the relevant health case for your client.

Refer to SOP Searching for a Health Case in IHS.

You can also use the [Client History Report](#) in IHS to find the matching health cases for your client.

When you have located the health case in IHS, it will open in the Visa Details tab.

Important Note: Ensure that you have located the correct health case for the correct client before you proceed with updating any of the details.

2. Review the health case and health assessment criteria

Review the details of the latest health case assessment, if there is one, to check if the health case needs to be reassessed under a different criteria. This will confirm if you need to update the visa details and add a new application in the health case.

Before you continue, you must confirm that:

- the medical certificate and/or chest x-ray in the health case can be accepted for the new application, and
- the health case needs to be assessed for the visa application you are lodging or assessing.

Refer to SOPs [Checking Medical Certificates in IHS](#), [Check the Health Case Status in IHS](#) and [Check the Health Assessment Outcome in IHS](#).

Note: Check the **Outcome History** table in the **Case Timeline** tab rather than relying on what's currently entered in the visa details tab and application details tab as there's a possibility this may not reflect the current assessment criteria for the health outcome.

Important Note: You should check against the immigration instructions for the application you are lodging or assessing to confirm whether a new medical certificate / chest x-ray needs to be requested or not.

3. Check current visa details and application details

When you have confirmed that the health case is the correct one for the application, you can check the current visa details and application details before you update them.

Check the current visa details and application details are correct for the application you are processing or assessing. These are the details in the 'Visa Details' and 'Application Details' tab:

Visa Details:

- AMS Client Id
- Person Id
- Referral Type
- Referral Note*
- Application Id
- Application Source
- Application Date
- Visa Category
- Visa Type
- Length of Stay (for Temporary only)

Check if all the information required for the referral has been provided and is correct i.e. all the visa application details are present and correct in all fields.

Note: The 'Referral Note' field is for the details to inform the HAT or MA what needs to happen next for the health case. This is instead of emailing the HAT.

4. Check the health case state

You must confirm that the health case is in the correct state. Visa details cannot be updated when the health case is in 'Obsolete' state.

Do this by checking in the grey banner at the top of the health case.

Determine your next step:

If the health case state is...	then
Assessed	<p>Visa details and Application details can be entered and / or updated in the health case.</p> <p>As the health case has been previously assessed, it can be re-assessed for the new application if required.</p> <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p>Note: To trigger the re-assessment, you can re-open a health case but you must enter or update the visa details and the application details first. Refer to SOP ID: Reopen a health case in IHS.</p> </div> <p>Go to next step.</p>
Awaiting Further Requirements	<p>Visa details can be entered and / or updated while it is in awaiting further requirements as part of the current health assessment.</p> <p>Go to next step.</p>
Hold	<p>Visa details and application details can be entered and / or updated (and attachments added) while the health case is on hold (it is in the holding queue to await further actions as defined by the hold reason before it can be assessed).</p> <p>Note: You can release a health case from on hold but you must enter or update</p>

	<p>Health cases can be released from on hold, but you must enter or update the visa details and application details first. Refer to SOP IO: Release a health case from on hold.</p> <p>Go to next step.</p>
Manual Assessment	<p>Visa details and application details can be entered and / or updated as it is in the HAT workflow queue for manual assessment.</p> <p>Note: You can also put a health case on hold after you have updated the visa details. Refer to SOP IO: Put a health case on hold.</p> <p>Go to next step.</p>
Medical Opinion	<p>Visa details cannot be entered or updated when the health case is in 'Medical Opinion' and is being assessed by a Medical Assessor. The application details fields can still be updated with the new visa applications when the health case is in 'Medical Opinion'.</p> <p>Process ends.</p>
Obsolete	<p>Visa details and application details cannot be entered or updated when the health case is Obsolete.</p> <p>Process ends.</p>
Open	<p>Visa details and application details can be entered and / or updated when the case is in an Open state (all medicals have not yet been submitted from eMedical into IHS).</p> <p>Go to next step.</p>

5. Update the visa details and add new applications to the application details tab

Enter or update the visa details for the new visa application within the visa details fields of the health case. These are the four fields at the top of the Visa Details tab:

- AMS Client Id
- Person Id (this is the number assigned to the client by IGMS).
- Referral Type
- Referral Note

Note: You only need to update these fields if they are missing or are not correct (including if they are older values and are not the current ones) for the new assessment required. If you update them, then add a Referral Note with the reason why you have changed them and what needs to be done next.

Save the changes if required.

6. Update the Referral Type

Enter or update the Referral Type as required. The Referral Type selected will define whether the assessment will be under General or Limited immigration instructions.

You will only need to update this field if it is blank or is not correct for the new assessment.

Select the required option from the drop-down list:

Note: A Referral Type is mandatory for a health case to be referred to a Medical Assessor. If the field is blank, then you must select one of the two options (General or Limited) from the drop-down list.

7. Add a Referral Note

Add a Referral Note when you are updating the visa details by typing the details directly into the free text box.

These are any additional details that you want the HAT or the Medical Assessor to be aware of or note during their assessment.

Important Note: You must include the details of the reason why you are updating the health case in the 'Referral Note' field. This is to inform the HAT or MA what needs to happen next for the health case, instead of emailing the HAT.

For example:

"Visa application received. Please refer health case for Residence assessment."

"Visa application received but case is in 'Open' state. Please refer health case for Temporary / Student assessment when medicals submitted."

Refer to the [Cheatsheet - IO actions in IHS for communications to HAT](#) for further examples.

Note: You can see all the changes made to the visa details within the 'Visa Details History' table in the Case Timeline tab of the health case.

Username	Date	Outcome	Visa Category	Visa Type	Length of Stay	Application Id	Referral Type
system	2003/2019 05:00	Incomplete	Residence	Skilled / Business		s9(2)(a) of the OIA	General
system	04/07/2019 11:11	Incomplete	Family	Guardian		s9(2)(a) of the OIA	General

From	To	Modified Date	Modified By	Field Name
s9(2)(a) of the OIA	s9(2)(a) of the OIA	04/07/2019 11:29	RL_MK_AL_1	AMS Client Id
s9(2)(a) of the OIA	s9(2)(a) of the OIA	02/07/2019 09:26	RL_MK_AL_1	Application Id

8. Update the application details

The application details in a health case are used as the criteria for the health assessment.

You will need to enter the new application details fields if they are not present or update them to reflect the new visa application you are lodging or assessing. (This is instead of emailing the HAT with the details of a new visa application). To enter the application details click the 'Add Application' button.

These are the seven fields within the 'Application Details' section in the Visa Details tab of the health case:

- Application Id
- Application Source
- Application Date
- Visa Category

- Visa Type
- Length of Stay (for Temporary only)
- Intended Work Activity

Note: The Application Id fields must be updated with the new AMS visa application number to be used for the assessment of the health case. Updating the Intended Work Activity field is optional. These application fields also facilitate the data warehouse 'Health case status update report' so it is very important that they are updated. IO and HAT users can update these fields in IHS.

The screenshot shows the 'Case Summary' section with 'AMS Client Id' and 'National Type' (General). The 'Further Requirements' section includes 'Person Id' and 'Referral Note'. The 'Application Details' section shows 'eMedical' information: 'Visa Category' (Family), 'Visa Type' (Guardian), and 'Length of Stay' (Less than 1 year). Below this is a table with columns: Application Id, Date, Visa Category, Visa Type, Length of Stay, Intended Work Activity, On Other Cases, and Actions. The first row shows '89(2)(a) of the' and a 'Save Application' button is visible.

Important Note: The drop-down list may display the new values and the old values in the lists. Please select one of the new values from the list. Do not select an older value from the lists as they are being phased out as the older cases are processed through IHS. These can be identified by the clock icon before the label in the drop-down list showing that have expired, like this:

The screenshot shows a dropdown menu for 'Length of Stay' with 'Permanently' selected. A clock icon is visible next to the selected option.

If the health case you are accessing has any of the older values in these fields, then update them to one of the new values that matches the visa application you are lodging or assessing. For example, this screenshot below shows a health case with an older Visa Category, Visa Type and Length of Stay. The latter two fields have the clock icon before the label. In this example you would change all three fields to update them to the new values: Residence, Family and More than 24 months.

Application ID

This is the AMS application number that must be entered correctly by a SO/IO/HAT to initiate a medical referral to a MA if required or claim a health case in IHS.

Application Source

When adding a new application number to IHS, the SO/IO/HAT will be able to select where the application was created, if it's either an ADEPT or AMS application. This will help the HAT filter through IHS to and refer cases with live applications to the MA bucket for a medical assessment.

Application Date

This is the date that the application was accepted either in AMS or ADEPT for processing. This date must be entered accurately because it will determine if the medical certificate is valid for the application added to IHS.

The screenshot shows the 'Add Application' form with a red box highlighting the following fields: Application Id* (89(2)(a) of the), Application Source* (ADEPT/AMS), Application Date* (ddmmyyyy), Visa Category* (Temporary), Visa Type* (Student), and Length of Stay (6 - 12 months). There are 'Cancel' and 'Save' buttons at the bottom.

a. Update the Visa Category

Select the correct Visa Category as required. You will only need to do this if it is not correct for the new assessment. Select from one of these visa categories at the top of the drop-down list:

- Temporary
- Residence
- Work to Residence.

Note: A Visa Category is mandatory i.e. every health case must have a Visa Category.

The screenshot shows the 'Add Application' form with the 'Visa Category*' dropdown menu open. The options 'Temporary', 'Residence', and 'Work to Residence' are highlighted with a red box. Below the dropdown, a list of older categories with clock icons is visible: Family, Humanitarian, Pacific Residence, Student, Visitor, and Work / Skills.

Important Note: Do not select an older Visa Category value (e.g. Family, Humanitarian, Pacific Residence, Work/Skills, Visitor or Student) the visa categories with the clock icon from the list. Only select one of these new values at the top of the drop-down list: Temporary, Residence or Work to Residence. If the health case you are accessing already has an older Visa Category value, then change it to one of the new Visa Category that matches the visa application you are lodging or assessing.

When a Visa Category value is changed, the Visa Type value will be cleared (i.e. the original value within the Visa Type field will be removed and it will show as 'Nothing selected' within the field as shown below).

The screenshot shows the 'Visa Category*' dropdown menu set to 'Residence' and the 'Visa Type*' dropdown menu set to 'Nothing selected'.

b. Update the Visa Type

Select the required visa type option from the drop-down list to update the Visa Type if the field is blank or is not correct for the new visa application you are lodging or assessing.

The Visa Types dynamically display based on the Visa Category selected previously.

This example shows the Visa Types for a Temporary Visa Category.

Add Application

Application ID* **s9(2)(a) of the OIA**

Application Source* ADEPT AMS

Application Date* ddmmyyyy

Visa Category* Temporary

Visa Type* Nothing selected

Length of Stay

Intended Work Activity

- Visitor
- Student
- Worker with job offer
- Worker without job offer

Note: A Visa Type is mandatory i.e. every health case must have a Visa Type. Visa Types are dynamically displayed based on the Visa Category. If what is shown in the visa type field is incorrect or it is blank, then you must select one of the visa types from the drop-down list as shown above.

c. Update the Length of Stay

Length of Stay is an Optional field for Residence but it must be entered for a Temporary visa. If the new assessment is for a Residence or Work to Residence visa, the Length of Stay is not required and:

- If the field is already blank then you can skip this step.
- If the field is already populated, it is good practice to change this to reflect a residency term which is 'More than 24 months'.

Note: You can also remove the existing value from this field by selecting the blank item at the top of the drop-down list. It will then show as 'Nothing selected'.

If the new assessment is for a Temporary visa, then you must enter the appropriate Length of Stay value as required.

Select one of these four options at the top of the drop-down list:

- Less than 6 months
- 6 – 12 months
- 12 – 24 months
- More than 24 months.

Add Application

Application ID* **s9(2)(a) of the OIA**

Application Source* ADEPT AMS

Application Date* ddmmyyyy

Visa Category* Temporary

Visa Type* Student

Length of Stay 6 - 12 months

Intended Work Activity

Length of Stay values to choose from are the four at the top of list. Do not choose any others from the list or any with a clock before the label (these are old values that will expire soon or have already expired.)

- Less than 6 months
- 6 - 12 months
- 12 - 24 months
- More than 24 months
- Less than 1 year 19/08/2018
- 1 year to less than 2 years 19/08/2018
- 2 years to less than 3 years 02/07/2018
- 3+ years 19/08/2018
- Permanently 19/08/2018

Note: Always select one of the new values from the drop-down list. These are the ones that do not have the clock icon and/or an end date. If the field is already populated with an older Length of Stay value (e.g. Less than 1 year / 1 - 2 years / 2 - 3 years / 3+ years / Permanently), then you change it to one of the new values.

7. Save the changes

When you have updated all the required fields, select 'Save' to commit all your changes.

A message will display within a green banner at the top of the health case stating that application has been linked successfully or that the application details for the health case have been updated.

Application linked successfully

s9(2)(a) of the OIA

Client History Manual Assessment Temporary ASH Residence

Case Summary Case Timeline Further Requirements Visa Details

AMS Client ID Person ID

Referral Type General Referral Note

Application Details

eMedical

Visa Category Residence

Visa Type Pacific Categories

Length of Stay

Intended Work Activity

Application ID	Date	Visa Category	Visa Type	Length of Stay	Intended Work Activity	On Other Cases	Actions
s9(2)(a) of the OIA	10/06/2021	Temporary	Student	6 - 12 months		No	Is
s9(2)(a) of the OIA	11/11/2001	Temporary	Visitor	More than 24 months		Yes	Is
s9(2)(a) of the OIA		Residence	Pacific Categories			Yes	Is

Add Application Cancel Full View Hold Save

Application details for H0015531 have been updated.

s9(2)(a) of the OIA

Client History Manual Assessment Temporary ASH Residence

Case Summary Case Timeline Further Requirements Visa Details

AMS Client ID 10 Person ID

Referral Type Limited Referral Note

Application Details

eMedical

Visa Category Residence

Visa Type Pacific Categories

Length of Stay

Intended Work Activity

Application ID	Date	Visa Category	Visa Type	Length of Stay	Intended Work Activity	On Other Cases	Actions
s9(2)(a) of the OIA	10/06/2021	Temporary	Student	6 - 12 months		No	Is
s9(2)(a) of the OIA	11/11/2001	Temporary	Visitor	More than 24 months		Yes	Is
s9(2)(a) of the OIA		Residence	Pacific Categories			Yes	Is

Add Application Cancel Full View Hold Save

Important Note: The visa and referral details saved at this point will be the criteria used to assess the health case. Please ensure that these are correct for the visa application you are lodging or assessing.

Visa Details History

Any changes made to the Applications Details (Application Id, Visa Category) are saved on the Case Timeline tab, on the Visa Details History table.

Visa Details History

From	To	Modified Date	Modified By	Field Name
SP2(a) of the OIA		16/09/2016 19:21	chris	Application Id
SP2(a) of		24/04/2015 17:31	lizhern	AMS Client Id
SP2(a) of		24/04/2015 17:31	lizhern	Person Id
SP2(a) of		24/04/2015 17:31	lizhern	Application Id

Username	Date	Visa Category	Visa Type	Length of Stay	Referral Type
chris	16/09/2016 19:21	Residence	Student / Business	More than 24 months	General
system	24/04/2015 17:31	Family	Partner	Less than 1 year	

Next steps

Determine your next step:

If the health case is	then
in manual assessment but assessment is to be held	<p>Put the health case on hold and add attachments (mandatory if further information were received from the applicant).</p> <p>Go to SOP IO Put a health case on hold.</p> <p>Note: When put on hold, the health case will be automatically forwarded by the system to the holding queue (in a 'Hold' state) to await further action (as defined by the hold reason) before it can be assessed.</p>
on hold but needs to be released from hold for an assessment	<p>Add attachments (optional) and release the health case from on hold.</p> <p>Go to SOP IO Release a health case from on hold.</p> <p>Note: To release a health case from on hold, you must enter or update the visa details in the Visa Details tab first or add a new application under the Application Details tab. When released, the health case will be automatically forwarded by the system either to the HAT workflow queue for manual assessment or the MA draw-down queue for a medical assessment, depending on the hold reason. The medical assessment will be based on the updated visa details and new visa application provided.</p>
assessed but is awaiting further requirements	<p>the health case will be automatically forwarded by the system to the HAT or a MA workflow queues for assessment when the further requirements are received in IHS from eMedical.</p> <p>You will need to wait until the further requirements are received.</p> <p>Note: You no longer have to email the client with a request for the further requirements. HAT will now communicate this to the applicant via the automated email system.</p>
No other action	Process ends.

Track the status of the health case to check when it has been assessed for the new application by regularly checking the Health Status Report or IHS for updates. Refer to [SOP Managing the Health Status report for the Office](#). Follow up with HAT if required.

References

Refer to:

FAQs: [FAQs - Visa Details in IHS](#), [FAQs - Re-opening health cases in IHS](#), [FAQs - 'Auto-Assessed' health cases](#), [FAQs - Health deferrals in IHS](#), [FAQs - Add attachments to a health case](#) and [FAQs - Hold or Release a health case in IHS](#).

IHS Manual: [Search - Minimum Criteria](#), [Identifiers tab](#), [Hold](#), [Release](#), [Edit Visa Details](#), and [Add Attachment](#).

SOPs: [Reopen a health case in IHS](#), [Put a health case on hold](#), and [Release a health case from on hold](#).

Training video: [IO Identifiers tab](#)

Update the Visa Details of a health case in IHS process map

Click [here](#) for the Update Visa Details of a health case in IHS process map.

See Also
IHS and Health
Immigration Health System Flowchart
IHS Known issues
Accessing Health Case 'Full View' in IHS
Check the Health Case Status in IHS
Check the Health Assessment Outcome in IHS
Checking Medical Certificates in IHS
Determine Further Requirements for a Health Case
Searching for a Health Case in IHS
Re-open a health case in IHS
Put a health case on hold in IHS
Release a health case from on hold in IHS
Update the email address on a health case in IHS
IHS Visa Details Cheatsheet
Client History Report
View the Client History Report
Client History Report Process
Communications to HAT
Recording Health Details in AMS
Managing the Health Status report for the Office
FAQ
IHS Training Videos

Released under the Official Information Act 1982

Update the email address on a health case in IHS

When to use

Use this procedure to update an email address on a health case within the Immigration Health System (IHS) when the update has been requested by the client.

Who is responsible?

Any INZ staff with access in IHS to update email addresses, which includes:

- Support Officer (SO)
- Immigration Officer (IO)
- Health Assessment Team (HAT)
- Customer Services Officer (CSO)

When

When a client contacts INZ to request that the email address on their health case is updated.

Context

When the panel physician is creating the client's health case in the eMedical system, the client can opt-in to receiving an automated email notification when:

- Their health case is submitted to INZ, and
- If INZ requires more health information.

If the applicant has opted-in to receiving these emails, they will receive a generic email when their health case has been submitted by the panel physician to INZ.

They will also receive a generic email if INZ requires additional health information. This is triggered by the HAT or MA in IHS. Note that:

- Emails are only sent to clients who opt-in to receiving them; and
- The email does not state what health information is required;
- The email instructs the client to visit a panel physician.

It is possible that the email address was entered incorrectly, or that the client would like it to be updated, and so INZ staff can update the email in IHS.

IHS Business Administrators can view a history of the changes made to IHS email addresses if required.

Pre-requisites

You have:

- received a request from a client to update their email address on their health case.

The client has:

- opted-in to receiving email notifications when the health case was created by the Panel Clinic; and
- provided the new email address.

Steps

1. Locate the health case in IHS

Search in IHS and locate the relevant health case for your client.

Refer to SOP Searching for a Health Case in IHS.

You can also use the [Client History Report](#) in IHS to find the matching health cases for your client.

When you have located the health case in IHS, it will open in the Identifiers tab.

Important Note: Ensure that you have located the correct health case for the correct client before you proceed with updating any of the details.

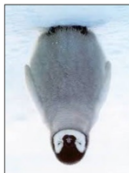
Health Case State: the email address cannot be updated if the health case state is either 'Open' or 'Obsolete'.

2. Check the email confirmation answer

Go to the Case Summary tab, and scroll down to the Client Details section.

Confirm that the client has opted-in to receiving emails.

Client Details

Name	Mickey Minnie TESTING	Date of Birth	23/04/1959	
Sex	MALE	Age at Medical Completion	60	
Country of Birth	Egypt	Partial DoB	No	
Client Declaration	Yes	Guardian Relationship		
Country of Citizenship				
Email Confirmation	Yes			

If the email confirmation is...	It means that...	Next step
Yes	The client has opted-in to receiving automated emails.	Proceed to Step 3.
No	The client has not opted-in to receiving automated emails. Therefore they will not have received any automated emails regarding either the submission of their health case, or notifications that INZ requires additional health information.	The email address cannot be updated in IHS (the edit icon does not display if they have not opted-in). Record all communication with the client in AMS. Process ends.

Important Note: If the client has not opted-in to receiving emails, they will not receive any automated emails. It is not possible to change this setting.

3. Update the email address


After you have confirmed that the client has opted-in to receiving automated emails, go to the Contact Details section of the Case Summary tab.

Here you can click on the Edit icon to update the email address.

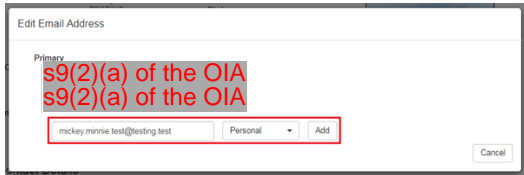


After clicking on the edit icon, a pop up window will display. You can choose to:

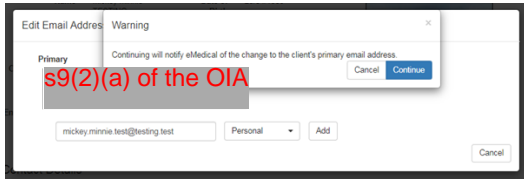
- Change the primary email address to an existing one on the health case, or
- Add a new email address to the health case.

Important Note: Automated emails will only be sent to the Primary email address, even if more than one email is recorded on the health case. You can tell which email is the primary email address by the  icon.

Either enter a new email address, or select an existing email address to be the primary contact.




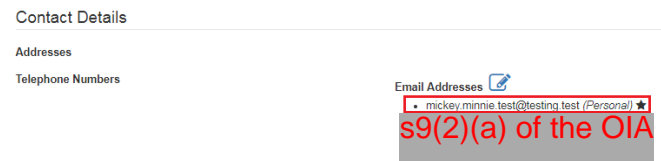
Once you either select a new primary email from the list, or enter a new email address and click add, a warning message will display to tell you that this change will also notify eMedical.



Click continue.

4. Confirm the email change

After you have made these changes, you will see that the  icon displays next to the primary email contact, and if you have added a new email address then this will display in the Contact Details section.



Important Note: If the client has opted-in to receiving emails and now would like to opt-out, please add the HAT external email address to the health case, and ensure it is set as the primary contact email - INZhealth@mbie.govt.nz.

The HAT will update the latest HAT assessment note to reflect the next course of action on the health case for the processing IO.

5. Record correspondence and changes in AMS

Make sure that you record all correspondence with the client in AMS, including the details of the updated email.

- See Also
- [IHS and Health](#)
 - [Immigration Health System Flowchart](#)
 - [IHS Known issues](#)
 - [Accessing Health Case 'Full View' in IHS](#)
 - [Check the Health Case Status in IHS](#)
 - [Check the Health Assessment Outcome in IHS](#)
 - [Checking Medical Certificates in IHS](#)
 - [Determine Further Requirements for a Health Case](#)
 - [Searching for a Health Case in IHS](#)
 - [Re-open a health case in IHS](#)
 - [Put a health case on hold in IHS](#)
 - [Release a health case from on hold in IHS](#)
 - [Update the visa details in a health case in IHS](#)
 - [IHS Visa Details Cheatsheet](#)
 - [Client History Report](#)
 - [View the Client History Report](#)
 - [Client History Report Process](#)
 - [Communications to HAT](#)
 - [Recording Health Details in AMS](#)
 - [Managing the Health Status report for the Office](#)
 - [FAQ](#)

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IHS Visa Details Cheatsheet

When to use

Use this guide on how to select the correct set of Visa and Referral Details values when updating the Visa Details and Application Details of a health case in the Immigration Health System (IHS) for Temporary visa applications.

Context

As part of the health assessment to determine an applicant's health status for a visa application, specific details about that application are required to be entered within the related health case in IHS.

These are the Visa Details and Application Details of a health case. The Visa Details comprise of:

- Visa and Referral Details (AMS Client Id, Person Id, Referral Type, and Referral Note)
- Application Details (Application Id, Application Source, Application Date, Visa Category, Visa Type, Length of Stay and Intended Work Activity).

AMS client ID and Person ID from IGMS must be entered correctly. In addition, a Referral Type was added: this is used to define whether the health case needs to be assessed under General or Limited medical referral guidelines.

A Referral Note free-text field was also added so that the branch IO can provide information to the HAT or MA for what is required to be done on the health case when the IO updates the visa details of the health case, including during the reopening of a health case or releasing a health case from on hold. This replaces the emailing of referral instructions to the HAT.

The action of adding an application under application details in a health case are to 'claim' the health case assessment outcome for the new visa application. This action can also trigger a new assessment for the health case under different assessment criteria when the health case is re-opened or released from on hold.

Also refer to:

[Update the visa details in a health case in IHS](#)

[Re-open a health case in IHS](#)

[Put a health case on hold in IHS](#)

[Release a health case from on hold in IHS](#)

[Communications to HAT](#)

[FAQs - Visa Details in IHS](#)

[FAQs - Re-opening health cases in IHS](#)

[FAQs - Hold or Release a health case in IHS](#)

Overview of new application details in IHS

Application ID

This is the AMS application number that must be entered correctly by a SO/IO/HAT to initiate a medical referral to a MA if required or claim a health case in IHS.

Application Source

When adding a new application number to IHS, the SO/IO/HAT will be able to select where the application was created, if it's either an ADEPT or AMS application. This will help the HAT filter through IHS to and refer cases with live applications to the MA bucket for a medical assessment.

Application Date

This is the date that the application was accepted either in AMS or ADEPT for processing. This date must be entered accurately because it will determine if the medical certificate is valid for the application added to IHS.

Visa Category

The Visa Categories to select from are: Temporary, Residence or Work to Residence.

Visa Type

The Visa Types for selection depend upon which Visa Category is selected. These are shown in the table below:

Visa Category	Visa Type
Temporary	Visitor
	Student
	Worker with job offer
	Worker without job offer
Residence	Skilled / Business
	Pacific Categories
	Family
	Humanitarian UNHCR
	Humanitarian other
	Christchurch Response (2019)
Work to Residence	Worker
	Family of worker

Length of Stay

A Length of Stay is only applicable to a Temporary visa. The new 'Length of stay' values to select from are:

- Less than 6 months
- 6 – 12 months
- 12 – 24 months
- More than 24 months

IHS Visa Detail combinations to use

Refer to the following tables to help you when you have a Work, Visitor and Student visa.

Work Visa Applications cheatsheet

Use this table below to select the correct combination of Visa and Referral details in IHS for Work Visa applications:

AMS visa application	IHS Visa and Referral Details values		
Visa Type	Visa Category	Visa Type	Length of stay
WV - Essential Skills	TEMPORARY	Work with job offer	Depend on skill level 6 - 12 months for low level More than 24 months for mid and higher levels
WV – Specific Purpose			Depend on Position Please check employment letter
WV – Talent (Accredited Employer)			More than 24 months
WV – Entertainment and Worker			Please check employment letter
WV – Post Study Employer Assisted			12 months – 24 months unless listed on WD1.c ⁰⁷
WV - Silver Fern Practical Experience			12 – 24 months
WV – Religious Worker			12 – 24 months
WV – Foreign Vessel			6 – 12 months
WV – Student & Trainee			Depend on occupation
WV – Seasonal Worker			< 6 months
WV – Post Study Open		Work without job offer	6 – 12 months
WV – Silver Fern Job Search		6 – 12 months	

Work Visa Applications cheatsheet

Use this table below to select the correct combination of Visa and Referral details in IHS for Work Visa applications:

AMS visa application	IHS Visa and Referral Details values		
Visa Type	Visa Category	Visa Type	Length of stay
WV - Essential Skills	TEMPORARY	Work with job offer	Depend on skill level 6 - 12 months for low level More than 24 months for mid and higher levels
WV – Specific Purpose			Depend on Position Please check employment letter
WV – Talent (Accredited Employer)			More than 24 months
WV – Entertainment and Worker			Please check employment letter
WV – Post Study Employer Assisted			12 months – 24 months unless listed on WD1.c ⁰⁷
WV - Silver Fern Practical Experience			12 – 24 months
WV – Religious Worker			12 – 24 months
WV – Foreign Vessel			6 – 12 months
WV – Student & Trainee			Depend on occupation
WV – Seasonal Worker			< 6 months
WV – Post Study Open		Work without job offer	6 – 12 months
WV – Silver Fern Job Search		6 – 12 months	
WV – WHS			
WV – Partnership	12 – 24 months		
WV – Dependent of a Student	Align with SP		
WV – Dependent of a worker	*CHECK Supporting	Family of Worker	More than 24 months

	Partner (SP's) Visa If SP is Work to Residence, then = Work to Residence		
	If SP is Work visa = TEMPORARY	Work with job offer [Note: This is so they will have higher priority in the bucket and be referred at the same priority as the worker]	Align with SP

Student Visa Applications cheatsheet

Use this table to select the correct combination of Visa and Referral details in IHS for Student Visa applications:

AMS visa application	IHS Visa and Referral Details values		
Visa Type	Visa Category	Visa Type	Length of stay
SV – Full Fee Paying	TEMPORARY	Student	For PHD student = More than 24 months For normal student = 6-12 months or 12 months – 24 months depending on lodgement/decision date
SV – English Study			Less than 6 months or 6 – 12 months
SV – Scholarship			Depend on the length of scholarship
SV – Exchange			6 – 12 months
SV – Pathway Student			More than 24 months
SV – Dependent of a student			Align with SP
SV – Dependent of a worker	*CHECK Supporting Partner (SP's) Visa If SP is Work to Residence, then = Work to Residence	Family of Worker	More than 24 months
	If SP is Work categories, then = TEMPORARY	Student	Align with SP

Visitor Visa Applications cheatsheet

Use this table to select the correct combination of Visa and Referral details in IHS for Visitor Visa applications:

AMS visa application	IHS Visa and Referral Details values		
Visa Type	Visa Category	Visa Type	Length of stay
VV – General	TEMPORARY	Visitor	< 6 months or 6 – 12 months
VV – Parent and Grandparent			More than 24 months
VV – Guardian			Align with student visa
VV – Medical Treatment			< 6 months
VV – Partnership			12 – 24 months
VV – Dependent of Work/Student	*CHECK Supporting Partner (SP's) Visa If SP is Work to Residence, then = Work to Residence	Family of Worker	More than 24 months
	If SP is Work visa, then = TEMPORARY	Visitor	Align with SP
	If SP is Student visa, then = TEMPORARY	Visitor	Align with SP

See Also

[IHS and Health](#)

[Immigration Health System Flowchart](#)

[IHS Known issues](#)

[Accessing Health Case 'Full View' in IHS](#)

[Check the Health Case Status in IHS](#)

[Check the Health Assessment Outcome in IHS](#)

[Checking Medical Certificates in IHS](#)

[Determine Further Requirements for a](#)

[Health Case](#)

[Searching for a Health Case in IHS](#)

[Re-open a health case in IHS](#)

[Put a health case on hold in IHS](#)

[Release a health case from on hold in IHS](#)

[Update the visa details in a health case in IHS](#)

[Update the email address on a health case in IHS](#)

[Client History Report](#)

[View the Client History Report](#)

[Client History Report Process](#)

[Communications to HAT](#)

[Recording Health Details in AMS](#)

[Managing the Health Status report for the Office](#)

[FAQ](#)

[IHS Training Videos](#)

[Immigration Health System \(HAT\)](#)

[Hidden Footnotes](#)

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Access the Client History Report

When to use

To access the 'Client History Report' to find existing health case matches to a client's health case you are viewing within the Immigration Health System (IHS).

This process would normally be completed as an on-demand request when required e.g. if you are assessing a health case and need more information about the client's previous health history.

Important Note: A client's health history information is very important and must be taken into account when making Immigration decisions about a client's status of health for a visa application.

To view and use the 'Client History Report', refer to [SOP View the Client History Report](#).

Role

- Health Assessment Officer (HAT)
- Medical Assessor (MA)
- Support Officer
- Immigration Officer (IO)
- Privacy Officer
- Senior / Customer Service Officer
- Technical Advisor
- Immigration Manager.

In IHS, you will have assigned access permissions as a HAT, MA, IO or IO_Full user. These permissions will determine what you can view in the Client History Report.

Context

The 'Client History Report' will provide you with a view of pre-existing health case information for a particular client using existing IHS and AMS data sets held within the Enterprise Data Warehouse.

This process allows a nominated person to access and run the 'Client History Report' request to initiate a search for and then view a client's previous health history as recorded in IHS. This is a more efficient process, saving the user from manually searching for other existing health cases for a client.

There are three ways to access the 'Client History Report' described in this document:

1. Access from the Immigration Health System (IHS)
2. Access from the Enterprise Reporting Portal / 'INZ - eMedical Reporting' tab
3. Access from an url within an internet browser.

Access from the Immigration Health System (IHS)

You can access the Client History Report directly from within the Immigration Health System (IHS).

Prerequisites

The user:

- has the appropriate access permissions to the Enterprise Reporting Portal
- is an authorised IHS user with the appropriate access permissions to run the Client History Report in IHS e.g. HAT, IO, MA, or Business Admin user role.

Steps

1. Open IHS in your web browser from your desktop

You can do this by double-clicking the shortcut on your computer desktop or opening the following link in your web browser:

<https://ihs.wd.govt.nz/>



You will be directed to the default IHS screens based on your user profile:

- For an IO user, the IO Search screen (Refer to [IHS Manual / IO — Search screen](#))
- For a HAT user, the HAT Workflow tab (Refer to [IHS Manual / HAT — Workflow tab](#))

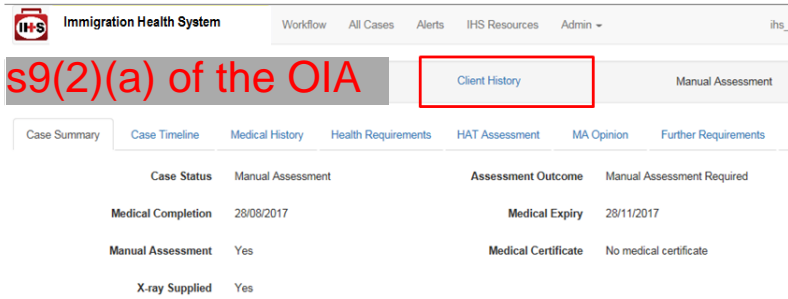
2. Identify the health case of interest

Identify the client's health case of interest from which you wish to request the 'Client History Report' by searching IHS using the steps described in the following SOPs:

if...	Then...
You are an IO user	In the IO Search screen, search for the health case of interest. Go to the Global Process Manual - IHS and HAT / Searching for a Health Case in IHS process and complete steps 3 to 5 to find the health case before you initiate the Report. Refer to IHS Manual / IO — Search screen .
You are a HAT user	In the HAT Workflow tab, search and find the health case of interest before you initiate the Report. Refer to IHS Manual / HAT — Workflow tab .
You are a MA user	Click on the required Health Case hyperlink to view it. Refer to

3. Request the 'Client History Report'

Select the Client History hyperlink in the IHS grey toolbar at the top of the selected health case you are viewing in your screen:



1. Start Assessment Conditions

This will trigger the request for the 'Client History Report' from the Enterprise Data Warehouse (EDW) based on the NZHR reference number of the health case being viewed.

4. Validate authorised user access to Report

EDW will validate that you are in an authorised user group prior to running the 'Client History Report'.

Note: It is expected that an IHS user already has access to the Data Warehouse – INZ reporting portal / eMedical Reporting Tab.

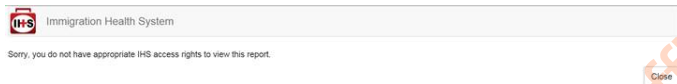
Determine next step:

If you are...	Then
not within an authorised 'Client History Report' user group	Go to step 5.
within an authorised 'Client History Report' user group.	EDW performs the health case matching for the 'Client History Report' request. Go to SOP View the Client History Report .

5. 'No authorised access rights' message is displayed

Where the system has determined that you do not have the appropriate access rights to view the 'Client History Report', you will be informed by the following message:

"Sorry, you do not have appropriate IHS access rights to view this report."



Close the message.

Process ends.

6. For authorised access, EDW performs the health case matching for the 'Client History Report'

EDW will perform the health case matching algorithm based on the NZHR and client data from within the EDW enhanced data sets, then collate the health case matches (if any found) to the configured thresholds for each authorised user group and present within the 'Client History Report'.

Access from the Enterprise Reporting Portal

An alternate method is to access the Client History Report directly from the Enterprise Reporting Portal 'INZ - eMedical Reporting' tab.

Prerequisites

The user:

- has the appropriate access permissions to the Enterprise Reporting Portal.
- is an authorised IHS user with the appropriate access permissions to run the Client History Report in IHS e.g. HAT, IO, MA, or Business Admin user role.
- has identified the health case of interest for a client with a NZHR reference number.

Steps

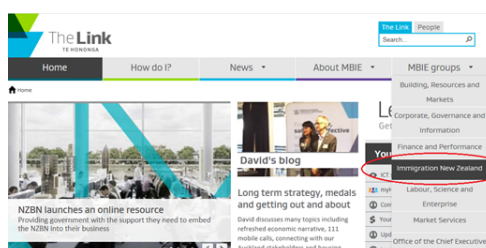
1. Navigate to the Enterprise Reporting Portal

You can access the 'Client History Report' by:

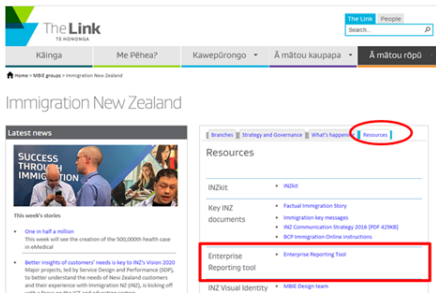
- clicking this link to the Enterprise Reporting Portal: <https://dwweb.wd.govt.nz/SASPortal/main.do>

OR

- navigating from [TheLink/MBIE Groups / Immigration New Zealand](#)



- and clicking the Resources tab and select the [Enterprise Reporting Tool](#):



This will take you to the Portal homepage.

2. Open the 'INZ - eMedical Reporting' tab

Click on the 'INZ - eMedical Reporting' tab in the Enterprise Reporting Portal:



3. Find the 'Client History Report' portlet and type in your NZHR reference number

At the bottom of the screen you will find a new portlet for the Client History Report. Type in an NZHR reference and then press the 'Go'.



4. Next steps

IHS sends the NZHR with the request to the EDW for a 'Client History Report' of matches on the associated client information.

The system will validate if you have authorised user access before it presents any results.

Follow the steps 4-6 described in the 'Access from the Immigration Health System (IHS)' section of this document.

Then go to [SOP View Client History Report](#)

End.

Access from an url in an internet browser

An alternate method is to access the Client History Report directly from the url in your internet web browser.

Prerequisites

The user:

- has the appropriate access permissions to the Enterprise Reporting Portal.
- is an authorised IHS user with the appropriate access permissions to run the Client History Report in IHS e.g. HAT, IO, MA, or Business Admin user role.
- has identified the health case of interest for a client with a NZHR reference number.

Steps

1. Open your internet browser

Open an internet browser session from your desktop.

Note: Internet Explorer is the preferred browser. Chrome can also be used.

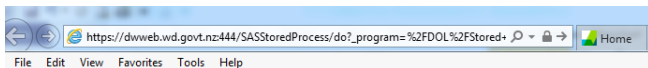
2. Copy the url string

Copy the 'Client History Report' url below:

https://dwwweb.wd.govt.nz/SASStoredProcess/do?_program=%2FDOL%2FStored+Processes%2FWorkForce%2FImmiMisc%2FIHSMisc%2FIHSMatchSearch&_action=execute&input_NZHR=HR0001000

3. Paste the url string into your browser

Paste the 'Client History Report' url into your browser window and click enter to activate the query:



4. Edit the url string

Edit the end of the url string to match the health case reference number (NZHR) for the health case of interest (this is shown highlighted in yellow below).

[https://dwwweb.wd.govt.nz/SASStoredProcess/do?_program=%2FDOL%2FStored+Processes%2FWorkForce%2FImmiMisc%2FIHSMisc%2FIHSMatchSearch&_action=execute&input_NZHR=99\(2\)\(a\) of the OIA](https://dwwweb.wd.govt.nz/SASStoredProcess/do?_program=%2FDOL%2FStored+Processes%2FWorkForce%2FImmiMisc%2FIHSMisc%2FIHSMatchSearch&_action=execute&input_NZHR=99(2)(a) of the OIA)

Note:

- Only edit the section from after the HRxxxxxx.

- An NZHR number must have 7 numerals after the 'HR'

Hit 'Enter' to activate the search.

5. Next steps

IHS sends the NZHR with the request to the EDW for a 'Client History Report' of matches on the associated client information.

The system will validate if you have authorised user access before it presents any results.

Follow the steps 4-6 described in the 'Access from the Immigration Health System (IHS)' section of this document.

Then go to [SOP View Client History Report](#)

End

See Also

[Client History Report](#)

[Client History Report Cheatsheet](#)

Released under the Official Information Act 1982



Client History Report

A client's health history information is very important and must be taken into account when making Immigration decisions about a client's status of health for a visa application. The **Client History Report** function performs an on-demand query of the Enterprise Data Warehouse (EDW) for any pre-existing health information for a particular client and presents the likely matches using AMS client data and IHS health information.

To activate the Client History Report from IHS, click the **Client History** hyperlink here in the grey banner of an IHS screen

If likely matches are found, the health case match results are presented as the **Client History Report**, in NZHR descending sort order with the most recent medical at the top where there is more than one result

s9(2)(a) of the OIA

Client History

Case Summary Case Timeline Medical History Health Requirements HAT Assessment MA Opinion Further Requirements

Case Status Manual Assessment Assessment Outcome Manual Assessment Required

Medical Completion 28/08/2017 Medical Expiry 28/11/2017

Manual Assessment Yes Medical Certificate No medical certificate

X-ray Supplied Yes

Latest Assessment Conditions

Likely health case matches for NZHR HR0156563

Matched NZHR	AMS Client ID	IHS Surname	AMS Client Surname	Medical Completion Date	Medical Certificate Type	Health Outcome	Health Outcome Date	Match %
s9(2)(a) of the OIA				04/08/2016	X-ray	ASH	05/08/2016	95
s9(2)(a) of the OIA				24/07/2015	X-ray	ASH	31/07/2015	95

Time since last refresh: 50 hours

Close

Click the **NZHR** hyperlink to view the health case in IHS

Click the **AMS Client ID** hyperlink to view the applicant in the Identity report

NOTE: Not all users of IHS have access to the **Client History Report**. If an error message appears, you don't have the right privileges to view it.

- Follow the instructions for help with using the Client History Report:
- Read the related SOPs in the Global Process manual and FAQs for the Client History Report
 - Contact your Technical Advisor, direct Manager or Health Assessment Team as appropriate.

IDENTITY REPORT

This information in this Identity Report must only be used for the purpose of carrying out your duties. This information (whether electronic or hard copy) may only be made available to others for official purposes and in accordance with the provisions of the Code of Conduct (Privacy Act 1992), the Official Information Act 1982 and Departmental policies.

Client number: s9(2)(a) of the OIA

Summary Photos Web CS&M Investigations AMS Notes Phone matches Email matches Alerts and Warnings

Client and Associations

Client name and associates

Client: s9(2)(a) of the OIA - 4 identities in AMS.

36 applications lodged between 8 Aug 2006 through to 15 Jul 2017.

Investigation Status: NEWC

HS&I / Labels / Movement s9(2)(a) of the OIA

Latest [3/02/17] Home Address

Role	Client	Surname	Given Names	Birthdate	Nationality	AMS Alert	AMS Warning	Investigation
This Client	s9(2)(a) of the OIA	Clave	Santa Lima Adam	1 Jan 1991	Christmas Island	--	Warning	--

The parts of the Report

The originating NZ Healthcase Reference number (NZHR) that initiated the search to find any other pre-existing health cases in IHS that match a client

The client names within IHS and AMS to compare details

The time elapsed in hours since the Enterprise Data Warehouse data was last refreshed

Matched NZHR	AMS Client ID	AMS Client Surname	IHS Surname	Medical Completion Date	Medical Certificate Type	Health Outcome	Health Outcome Date	Match %
s9(2)(a) of the OIA				07/11/2016	General	ASH	07/11/2016	100

Caveat: The user is responsible for ensuring that the cases displayed above match the client you are assessing.

Close

A pre-existing health case (NZHR) matched to the originating NZHR that initiated the search

The AMS Client ID for the client – click to open the Identity Report in the INZ – Identity Portal

The type of medical certificate in the matched health case

The outcome of the medical assessment for the client's health case

Click to close the report

Note the caveat for the Report:
The user is responsible for ensuring that the cases displayed above match the client you are assessing.

The % matched

More about the Report

Name	Description
Matched NZHR	The matched health case to the NZHR that originated the search in IHS, presented as the NZHR number (e.g. HR0021198). Click on the NZHR hyperlink to open the Health Case in IHS.
AMS Client ID	The primary identifier for a client in AMS. Click the hyperlink to open the INZ - Identity Report within the INZ Identity Portal.
AMS Client Surname	The client surname in AMS, used for comparison for identity matching as it may be different from the names held in IHS.
IHS Client Surname	The client surname in IHS, used for comparison for identity matching as it may be different from what is held in AMS.
Medical Certificate Type	The medical certificate type(s) contained within the health case. The possible combinations presented are: <ul style="list-style-type: none">• General• General+ X-ray• Limited• Limited+ X-ray• X-ray only• Supplementary• Supplementary+ X-ray
Medical Completion Date	The date the health case was submitted in eMedical to INZ. (3 months from this date is the Medical Expiry Date.)
Health Outcome	The outcome of the assessment decision for the client's standard of health, where the values are one of: <ul style="list-style-type: none">• ASH• ASH with conditions• Not ASH• Deferral• Incomplete Note: Known as "Assessment Outcome" in IHS.
Health Outcome Date	The date of the decision of the health assessment in IHS for a client's health case.
Match %	The percentage the pre-existing health case is matched to the originating health case as defined by the search parameters. The match threshold categories are: <ul style="list-style-type: none">• 100% match = "Almost Certain"• 90% match = "Very, very strong"• 80% match = "Highly Likely"
Caveat	A caveat to advise users of the report that when the matches are displayed (with the match %) that the user is responsible for ensuring the cases displayed match the client they are assessing.

View the Client History Report

When to use

Use to request the 'Client History Report' to find existing health case matches to a client's health case you are viewing within the Immigration Health System (IHS) and view the resulting health case matches presented in the report.

This process would normally be completed as an on-demand request when required e.g. if you are viewing or assessing a health case and need more information about the client's previous health history.

To access the 'Client History Report', refer to [SOP Access the Client History Report](#).

Role

All roles that can view health cases in IHS:

- Health Assessment Officer
- Medical Assessor
- Support Officer
- Immigration Officer (IO)
- Privacy Officer
- Senior / Customer Service Officer
- Technical Advisor
- Immigration Manager

In IHS, you will have assigned access permissions as a HAT, MA, IO or IO_Full user. These permissions will determine what you can view in the Client History Report.

Context

The 'Client History Report' will provide you with a view of pre-existing health case information using existing IHS and AMS data sets held within the Enterprise Data Warehouse.

This process allows a nominated person to access and run the 'Client History Report' request to initiate a search for and then view a client's previous health history as recorded in IHS. This is a more efficient process, saving the user from manually searching for other existing health cases for a client.

Refer also to the [SOP Client History Report Process](#).

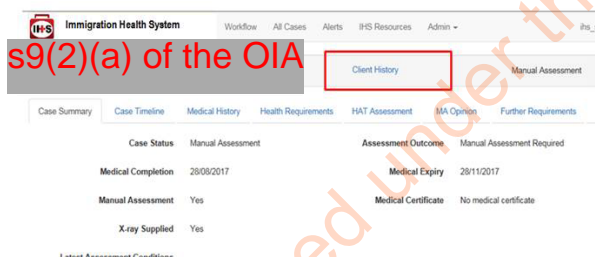
Prerequisites

You are an authorised IHS user and have the appropriate access permissions to run the:

- Client History Report in IHS e.g. HAT, IO, MA, or Business Admin user role
- 'INZ – Identity Report' in AMS
- 'INZ - eMedical Reporting' tab from the Enterprise Reporting Portal

You have:

- logged into IHS
- completed steps 1-6 described in [SOP Access the Client History Report](#):
 - identified the health case of interest and
 - sent the request to initiate the 'Client History Report'.



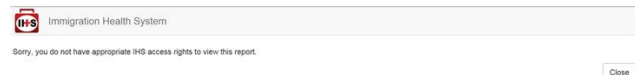
Steps

1. EDW performs the health case matching for the 'Client History Report'

For authorised user access, the EDW will perform the health case matching algorithm based on the NZHR and client data from within the EDW enhanced data sets.


It then collates the health case matches (if any are found) to the configured thresholds for each authorised user group type and presents the matches within the 'Client History Report'.

Where the system has determined that you do not have the appropriate access rights to view the 'Client History Report', you will be informed by the following message:



2. View the 'Client History Report' results

Determine your next step:

Where...	Then you are presented with...
a. You are in the unrestricted user group e.g. HAT, Business Admin	<p>all valid health case matches to the configured threshold % match on the client information within the Client History Report.</p>  <p>Go to step 3.</p>
b. You are in the restricted user group e.g. IO, MA	all health cases with 100% match on the client information presented within the Client History Report.

	<p>Go to step 3.</p>
c. No health case or client identity matches found	<p>the message:</p> <p>"No matches found for the NZHR number provided"</p> <p>Close the message. Process ends.</p>
d. No health case matches found but client identity matches found	<p>the message:</p> <p>"No health case matches found for the NZHR number provided. Likely AMS Client nnnnnnn"</p> <p>Click on the hyperlink to view the AMS Client in the Identity report Go to step 4.</p>

Note: Most often the 'No matches found' message (2c or 2d) results. This is because most health cases are single use by a one-off client, and therefore unique. It is estimated that perhaps one in four health cases will have a match. This will be lowest for the newest events, either because they are a new client to INZ and also unique, or because they have less detail at the earlier stage (e.g. the visa application being raised in AMS is later in the process and some of the detail is also used for the matching).

3. Review 'Client History Report' for health case matches returned

Review the 'Client History Report' for all the health cases returned as matches to identify the health case(s) that match the visa applicant for the health case of interest.

Important Note: You may need to check every matched case in the list. Note the 'Match %' only indicates the confidence level of the match set by the data warehouse, e.g. a 100% match still needs to be verified.
Note: Most matches are linked via an AMS ClientID being in common. The clientID is not necessarily the one stored within the health case, but is the key derived from travelDocs, notes, relinked AMS client IDs etc. These clientID leads are displayed and linked to the ERDM Identity Report as well as the latest AMS Surname for that client. When a match is not based on associating a health case via an AMS ClientID to other health cases, no identity report link and no AMS Surname will be available. These matches have been found only within IHS by a degree of equality of its own bio detail.

Determine your next step:

Where	Then
An identity report for a health case within the results of the 'Client History Report' needs to be reviewed	Check the 'INZ - Identity Report'. Go to step 4.
A health case within the results of the 'Client History Report' needs to be reviewed	Check the health case within IHS. Go to step 9.
The 'Client History Report' is not required and is to be closed	Close the 'Client History Report'. Process ends.

4. Request client 'INZ - Identity Report' for a health case

Click on the 'AMS Client ID' hyperlink within the 'Client History Report' to request the client 'INZ - Identity Report' for a matched health case.

Caveat: The user is responsible for ensuring that the cases displayed above match the client you are assessing.

Important note: If you find two clients that appear to be the same then the existing processes should be followed to resolve identities in AMS. This is to ensure this person is matched in the future and to update the information at the source by adding the identity information to an AMS client. Please contact the IDme Team for this purpose.

5. EDW validates you have authorised access to the 'INZ - Identity Report'

Determine your next step:

Where	Then
The user has no authorised access	Go to step 6.
The user has authorised access	Go to step 7.

6. Display error message

You will be presented with the following message where you are not a current AMS user (and therefore do not have authorised access to the 'INZ - Identity Report'):

"Sorry! We are unable to process that request. AMS Client Identity access rights are required to run this report"

IDENTITY REPORT

Identity report page

Sorry! We were unable to process that request.

AMS Client Identity access rights are required to run this report.

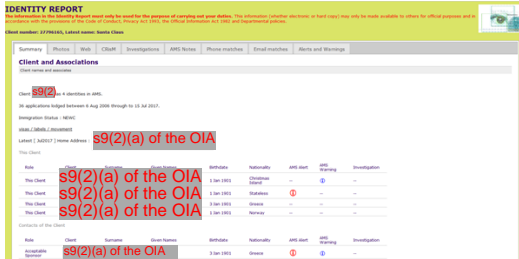
[Go Back](#)

Close the message.

Process ends.

7. Display the 'INZ - Identity Report' for the client

EDW will display the 'INZ - Identity Report' for the match to the client details (as requested in step 4) where you have authorised access.



8. Review the 'INZ - Identity Report' to determine if it matches your client

Review the client's 'INZ-Identity Report' to determine if it matches your client for the health case of interest.

Important: To prevent any privacy breaches, it is important to ensure that the health case matches your client before you start using the information in the health case. [Note: This is the same as step 5 in [Searching for a Health Case in IHS](#) within the [Global Process Manual](#)]

Check that the information in the identity Report matches your client information:

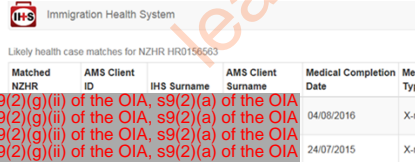
- Check that the name, date of birth and country of birth from the health case matches the passport and application form.
- Check that the photo from the health case matches the original health case photos or the passport and application form photos.

Determine your next step:

If the identity information	Then								
matches your client	Return to the 'Client History Report' to select the associated health case to open it in IHS. Go to Step 9.								
does not match your client	<table border="1"> <thead> <tr> <th>Where</th> <th>Then</th> </tr> </thead> <tbody> <tr> <td>Another identity is to be reviewed</td> <td>Go back to the 'Client History Report' to review another identity for a health case listed. Go to Step 3.</td> </tr> <tr> <td>No other identities to be reviewed</td> <td>Close the 'Client History Report'. Process ends.</td> </tr> <tr> <td>A health case is to be reviewed</td> <td>Go back to the 'Client History Report' to review a health case. Go to Step 3.</td> </tr> </tbody> </table>	Where	Then	Another identity is to be reviewed	Go back to the 'Client History Report' to review another identity for a health case listed. Go to Step 3.	No other identities to be reviewed	Close the 'Client History Report'. Process ends.	A health case is to be reviewed	Go back to the 'Client History Report' to review a health case. Go to Step 3.
Where	Then								
Another identity is to be reviewed	Go back to the 'Client History Report' to review another identity for a health case listed. Go to Step 3.								
No other identities to be reviewed	Close the 'Client History Report'. Process ends.								
A health case is to be reviewed	Go back to the 'Client History Report' to review a health case. Go to Step 3.								

9. Select to view a health case

To verify the health case, click on the NZHR hyperlink within the 'Client History Report' to open the health case in IHS.



Caution: The user is responsible for ensuring that the cases displayed above match the client you are assessing.

10. Request to open the health case in IHS

EDW will pass the Health Case Id of the selected health case to request IHS to open it.

11. Display the health case in IHS

The health case will be opened and displayed in IHS within a new session (according to your browser settings) based on your user role.

12. View the health case details

View the details of the selected health case within IHS and validate if the health case is relevant to your original health case of interest.

Important note: When viewing the Client History Report, if any previous not-ASH or ASH with conditions matches have been found for your client, then these should be considered when processing the health case of interest. Please reopen the previous health case (the Not-ASH or ASH with conditions health case) and quote the NZER number of the new health case within the Referral Note field when you update the visa application and referral details in the 'Identifiers' tab. Refer to [SOP Re-open a health case in IHS](#).

13. Next steps

Close the health case view.

Determine your next step:

Where	Then

another health case is to be reviewed in the 'Client History Report'	Go back to review the 'Client History Report'. Repeat the process for as many of the matched results as required until all relevant health cases have been reviewed [as necessary]. Go to step 3.
all relevant health cases within the 'Client History Report' have been reviewed	Close the 'Client History Report'. Process ends.

END

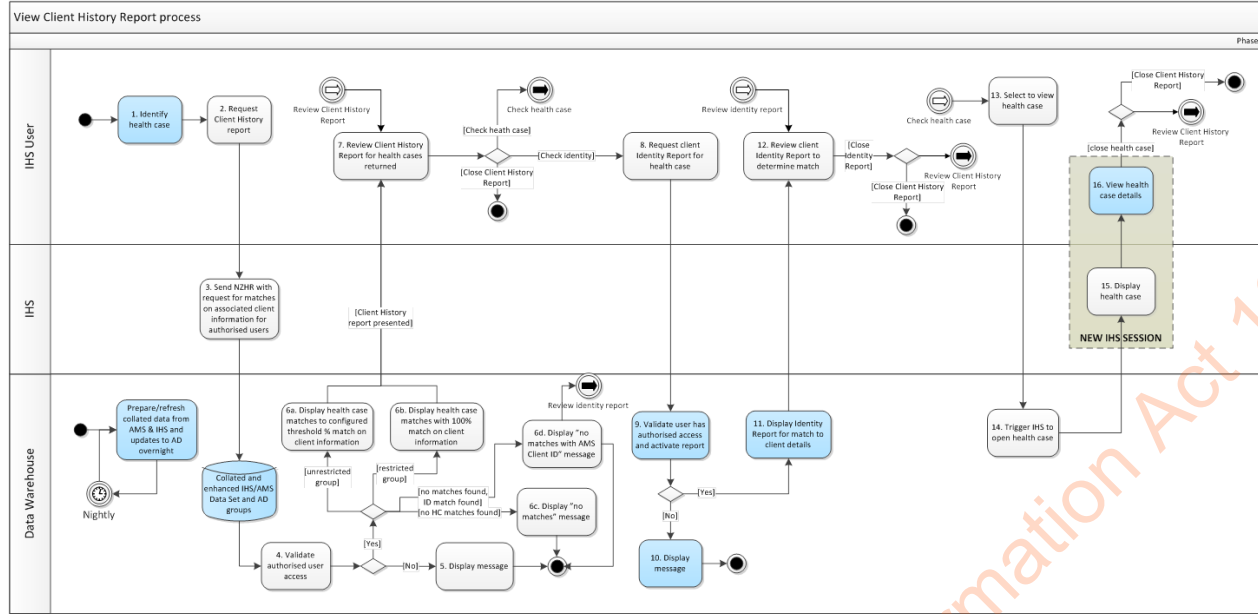
See Also
IHS and Health
Immigration Health System Flowchart
IHS Known issues
Accessing Health Case 'Full View' in IHS
Check the Health Case Status in IHS
Check the Health Assessment Outcome in IHS
Checking Medical Certificates in IHS
Determine Further Requirements for a Health Case
Searching for a Health Case in IHS
Re-open a health case in IHS
Put a health case on hold in IHS
Release a health case from on hold in IHS
Update the visa details in a health case in IHS
Update the email address on a health case in IHS
IHS Visa Details Cheatsheet
Client History Report
Client History Report Process
Communications to HAT
Recording Health Details in AMS
Managing the Health Status report for the Office
FAQ
IHS Training Videos
Immigration Health System (HAT)
Hidden Footnotes

Released under the Official Information Act 1982

Client History Report Process

Click [here](#) to view the Client History Report Process.

The process diagram attached illustrates the View Client History process when an IHS user requests the report in the context of a health case of interest and views the results.



See Also

- [IHS and Health](#)
- [Immigration Health System Flowchart](#)
- [IHS Known issues](#)
- [Accessing Health Case 'Full View' in IHS](#)
- [Check the Health Case Status in IHS](#)
- [Check the Health Assessment Outcome in IHS](#)
- [Checking Medical Certificates in IHS](#)
- [Determine Further Requirements for a Health Case](#)
- [Searching for a Health Case in IHS](#)
- [Re-open a health case in IHS](#)
- [Put a health case on hold in IHS](#)
- [Release a health case from on hold in IHS](#)
- [Update the visa details in a health case in IHS](#)
- [Update the email address on a health case in IHS](#)
- [IHS Visa Details Cheatsheet](#)
- [Client History Report](#)
- [View the Client History Report](#)
- [Communications to HAT](#)
- [Recording Health Details in AMS](#)
- [Managing the Health Status report for the Office](#)
- [FAQ](#)
- [IHS Training Videos](#)
- [Immigration Health System \(HAT\)](#)
- [Hidden Footnotes](#)

Request a reconfirmation for a disputed 'NOT ASH' medical opinion

Note: This replaces the guidance in the AMS Manual - [AMS Reference Guide / Health functionality / Medical referrals / Disputed medical opinions](#)

It also replaces parts of these INZkit processes (e.g. [Assess against health criteria](#), [Assess visitor application](#), [Assess SSE application](#), and [Assess student application \(partners/dependants\)](#)).

When to use

Use this procedure when you have received disputed information for a health decision of 'Not-ASH' and need to request a referral of the applicant's health case to a Medical Assessor (MA) so that the health decision can be reconfirmed.

Role

Immigration Officer (IO)

Prerequisite

- A medical certificate is required for an applicant's application
- The applicant's health has been assessed as 'Not-ASH' (i.e. the applicant does not have an acceptable standard of health)
- The applicant will have been sent a PPI letter asking them to respond to the MA's opinion they are 'Not-ASH'.
- The applicant has responded and disputes the MA's findings.

Context

A Health Assessment Warning in AMS against the client will often be a prompt to the IO that some action is required regarding a client's health. There will also be corresponding notes within the health case in IHS.

If the client provides information to INZ that disputes the Medical Assessor's opinion (i.e. a 'Not-ASH' health status), then you may need to re-open the health case in the Immigration Health System (IHS), as the health case would have been closed after it was assessed, to re-refer the health case to a Medical Assessor for confirmation of the opinion. If the decision in the health case is final, then you may need to contact the HAT via email instead.

Note: In the PPI letter, you should ask the client to submit the disputing information in one reply instead of several emails, as this will reduce the risk of mishandling of any disputing information.

When the disputing information is received, the Immigration Officer should check that all the disputing information has been provided before doing any actions in IHS or submitting it to HAT.

If you need to re-open the health case for a reassessment of the 'Not-ASH' opinion, then you need to update the visa application and referral details (or ensure they are all present and correct for the disputed application) in the 'Identifiers' tab first.

You also must add in a 'Referral Note' with the request to re-refer the health case to a Medical Assessor for confirmation of the 'Not-ASH' opinion. This information is very important as this advises the HAT or MA of what you need done next for the health case. Refer to [SOP Update the visa details in a health case in IHS](#) and [FAQs - Visa Details in IHS](#) for further details.

Once you have reopened the health case, you can upload the disputing information as attachments. Refer to [SOP Re-open a health case in IHS, FAQs - Re-opening health cases in IHS](#) and [FAQs - Add attachments to a health case](#) for details.

When the health case is re-opened for a re-assessment:

- For temporary applications, the dissenting opinion (with the original health case) will be sent to the original Medical Assessor, who will consider it and give a final opinion.
- For residence applications, the dissenting opinion (with original health case) will be sent to the original Medical Assessor. If they confirm their opinion, it will then be sent to a second Medical Assessor (a suitably qualified person as a Medical Referee) for a second opinion. This second opinion is final.

Note: If the final decision is still NOT ASH, the health case will only be valid for 3 months from date of submission in eMedical i.e. the medical expiry date in IHS. View the 'Case Timeline' tab for these dates.

Steps

1. Check all disputing information is complete

Check all the information for the disputed medical opinion to ensure that it is correct and complete. Double check with the client to confirm that all the information has been provided by the due date.

Note: If the client has submitted the medical information as part of their dispute, it must be from a medical professional. HAT only require the health related information for the disputed medical opinion. Do not upload or send any other visa information that is not medical related. This includes any information relating to a medical waiver or the visa application.
Important Note: Support letters from family, receipts or evidence of appointment with a specialist are NOT Disputing information.

Determine your next step:

If the information is ...	Then...
not complete	<p>wait until all information is received for the disputing case before doing any further actions in IHS.</p> <p>Note: Do not re-open the health case, or update the identifiers in IHS or submit any incomplete information into IHS or send to HAT.</p> <p>Process ends.</p>
not from a medical professional	<p>Please ask the client to check back with a health professional and, when received, submit the correct information from a medical professional instead.</p> <p>Note: Do not re-open the health case, or update the identifiers in IHS or submit any non-medical professional</p>

	<p>information into IHS or send to HAT.</p> <p>Process ends.</p>
not health related	<p>Note: Do not re-open the health case, or update the identifiers in IHS or submit any not health related information into IHS or send to HAT.</p> <p>Process ends.</p>
health related and is correct and is all complete	Go to next step.

2. Determine if the health decision is final or if you need to reopen the health case

First, you must first check if the 'Not-ASH' decision is final. This will determine if you need to re-open the health case or not. Review the Latest Assessment Note in the health case for the health decision to check if the decision on the health case is final. If the health decision is final, then the health case has gone through the complete referral process and this is the final decision for that visa category (Residence / Temporary or Work to Residence). The Latest Assessment Note will show the word (final) in brackets next to the 'HEALTH DECISION: NOT ASH for Temporary or Residence (final)' like shown in the examples below:

HEALTH DECISION: NOT ASH for Residence (final)	HEALTH DECISION: NOT ASH for Temporary (final)
IHS/ eMedical reference NZER: §9(2)(a) of the OIA	IHS/ eMedical reference NZER: §9(2)(a) of the OIA
MA's reason: copy MA's reason	MA's reason: copy MA's reason
MA's comment: copy MA's comment	MA's comment: copy MA's comment

Determine your next step:

If the Not-ASH health decision is...	then										
Final	<p>this is the final decision for that visa category (Residence / Temporary or Work to Residence). Determine your next step:</p> <table border="1"> <thead> <tr> <th>If the 'Not-ASH' decision is for</th> <th>and you have</th> </tr> </thead> <tbody> <tr> <td>Residence or Work to Residence</td> <td>a Temporary visa application, then you can re-open the health case and update the identifiers and visa details in IHS. Go to step 4.</td> </tr> <tr> <td>Residence or Work to Residence</td> <td>a Residence or Work to Residence visa application, then do not re-open the health case or update the identifiers and visa details in IHS. You will need to email the HAT (HAT@mbie.govt.nz) with your request instead if you have received any further disputing information from the applicant. Go to step 3</td> </tr> <tr> <td>Temporary</td> <td>and you have a Residence or Work to Residence visa application, then you can re-open the health case and update the identifiers and visa details in IHS. Go to step 4.</td> </tr> <tr> <td>Temporary</td> <td>and you have a Temporary application, then do not re-open the health case or update the identifiers and visa details in IHS. You will need to email the HAT (HAT@mbie.govt.nz) with your request instead if you have received any further disputing information from the applicant. Go to step 3.</td> </tr> </tbody> </table>	If the 'Not-ASH' decision is for	and you have	Residence or Work to Residence	a Temporary visa application, then you can re-open the health case and update the identifiers and visa details in IHS. Go to step 4.	Residence or Work to Residence	a Residence or Work to Residence visa application, then do not re-open the health case or update the identifiers and visa details in IHS. You will need to email the HAT (HAT@mbie.govt.nz) with your request instead if you have received any further disputing information from the applicant. Go to step 3	Temporary	and you have a Residence or Work to Residence visa application, then you can re-open the health case and update the identifiers and visa details in IHS. Go to step 4.	Temporary	and you have a Temporary application, then do not re-open the health case or update the identifiers and visa details in IHS. You will need to email the HAT (HAT@mbie.govt.nz) with your request instead if you have received any further disputing information from the applicant. Go to step 3.
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not final	<p>the health case has not gone through the complete referral process and can be re-opened for a reassessment. You can update the identifiers and visa details in IHS for the disputing application if required. Go to step 4.</p>										

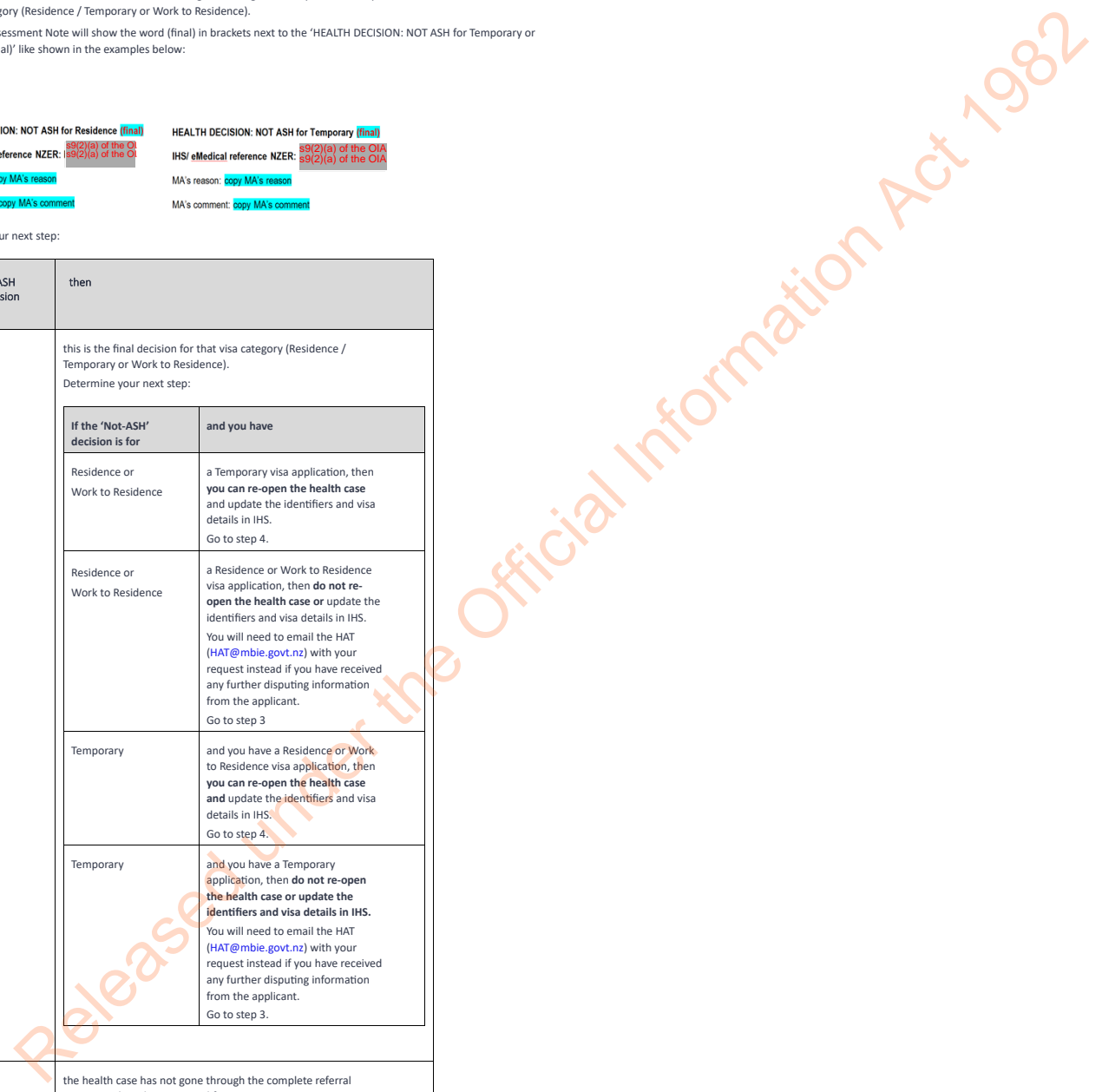
3. Create an email request to the Health Assessment Team (HAT)

Where you have determined you must not re-open the health case (as defined in Step 1), you must email the HAT instead. Create an email request for the HAT to query the applicant's 'Not-ASH' health outcome with the subject line "DISPUTING INFORMATION for NZER: N00000000" in the email. Refer to [SOP Communications to HAT](#) for details. When making the request, you must provide the following information:

- NZER number (or NZHR if no NZER)
- AMS Application Number
- Client's Name
- Visa Category / Type
- Brief reason for the request

Using the following template in the body of the email, complete the details required:

NZER (or NZHR)	[NZER is the preferred]
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AMS Application Number	
Client's Name	
Visa Category and Visa Type	Temporary: Visitor / Student / Worker with job offer/ Residence: Skilled/Business / Pacific Categories / Family / Humanitarian UNHCR /Humanitarian other Work to Residence: Worker / Family of worker [Select one Visa Category and Visa Type that applies to the Visa Category selected]
Type of referral	General or Limited [only provide if necessary]
Length of stay	[only provide if for Temporary]
Reason	Provide brief reason for the request

Attach all relevant medical tests and / or disputing information (whatever you have received from the client) for the client's application into the email to send to HAT. Ensure that it is all medical related information only.

Note: Make sure there is nothing outstanding for the dispute before sending to the HAT. Medical information can only be accepted if it is sourced from a medical professional.
Please only send one email request to the HAT for each disputed application. Submit all the disputing information into this email as this will reduce the risk of mishandling of any disputing information. Do not send or forward the clients original email(s) directly to the HAT.

Skip steps 4 and 5, then go to 'Next steps'.

4. Re-open the health case for a re-assessment

If you have determined that you need to re-open the health case (in Step 1) to reconfirm the 'Not-ASH' outcome, then before you re-open the health case, you must ensure that all the required information for the disputed application is present and correct in the health case in IHS. Update following application identifiers and visa details in the 'Identifiers' tab:

- AMS Client Id
- Visa Application #
- Visa Category
- Visa Type
- Length of Stay (for Temporary only)
- Referral Type
- Referral Note*

* You must add in a 'Referral Note' in the 'Identifiers' tab with the request to re-refer the health case to a Medical Assessor for confirmation of the 'Not ASH' opinion. For example:

"Disputing information attached. Please refer for reconfirmation of 'Not-ASH' health decision for Residence application."

Important Note: The information you add into the referral note field is very important as this advises the HAT or MA of what you need done next for the health case. Refer to [SOP Update the visa details in a health case in IHS](#) and [FAQs - Visa Details in IHS](#) for further details.

After the visa details and application identifiers are updated, re-open the health case. Refer to [SOP Re-open a health case in IHS](#), and [FAQs - Re-opening health cases in IHS](#) for details.

5. Upload any supporting information provided by the applicant to the health case

As soon as the health case is re-opened, you can upload the disputing information to the health case. Refer to [SOP FAQs - Add attachments to a health case](#).

Attach all relevant medical tests and / or disputing information (all the medical information you have received from the client after you have checked it is complete and correct) for the client's application into the health case in IHS. Ensure that all documents are medical related information only.

Note: Make sure there is nothing outstanding for the dispute. Ensure that all disputed information is all finalised before uploading into the health case. This will reduce the risk of mishandling of any disputing information. Medical information can only be accepted by INZ for assessment if it is sourced from a medical professional. Support letters from family, receipts or evidence of appointment with a specialist are **NOT** Disputing information. **Do not upload** the client's original email(s) into the health case.
Important Note: You can only attach documents at the time you re-open a health case. Once the documents are uploaded, you will not be able to delete them. If the documents you have uploaded are incorrect, you will need to contact the HAT (HAT@mbie.govt.nz) to remove them from the health case. Refer to [SOP Communications to HAT](#) for details on how to do this.

When the health case is re-opened, it will be automatically forwarded to the HAT workflow queue for manual assessment.

Next Steps

Remember to regularly check in IHS for any updates to the health case.

Track the status of the health case to check when it has been reassessed. Check the Health Status Report for updates. Refer to [SOP Managing the Health Status report for the Office](#). Follow up with HAT as required if you cannot understand what's happening to the health case in IHS.

Note: If you have missed some of the disputing information from when you re-opened the health case, and the health case is currently in 'Medical Opinion', please contact HAT and use the subject title URGENT. Refer to [SOP Communications to HAT](#) for details on how to do this.

Process ends.

See Also

- [Communications to HAT](#)
- [Sending communications to HAT](#)
- [Cheatsheet - IO actions in IHS for communications to HAT](#)
- [Advise HAT when a visa application is withdrawn or declined](#)

Sending communications to HAT

When to use

Use this guide when sending email communications to the HAT (HAT@mbie.govt.nz) for any notifications, requests, clarifications and queries regarding health information in the Immigration Health System (IHS).

This is the exception process when you cannot complete any actions in the IHS.

Role

- Support Officer (SO)
- Immigration Officer (IO)
- Technical Advisor (TA)
- Customer Services Officer

Context

With the updates to IHS in August 2018, an IO user has the ability to:

- update the visa and referral details in the health case
- re-open a health case and add attachments
- put a health case on hold and release it from on hold.

For example, if a health case needs to be assessed or reassessed, you can now re-open it. When you receive additional information, you can upload this into a health case when you re-open it for a new assessment. You can update the visa and referral details as well as the application identifiers as you do now. You can also add attachments to a health case that is on hold and then release it from on hold.

These actions are instead of emailing the HAT.

Important Note: If you do any of these actions, when you update the visa application details in the 'Identifiers' tab, it is important that you add in a 'Referral Note' to advise the HAT why you are reopening, releasing and / or updating the health case. Refer to [SOPs Re-open a health case in IHS](#), [Update the visa details in a health case in IHS](#), [Put a health case on hold in IHS](#), [Release a health case from on hold in IHS](#), [FAQs - Re-opening health cases in IHS](#), [FAQs - Add attachments to a health case](#) and [FAQs - Visa Details in IHS](#).

In certain situations you will be required to contact the HAT, where you cannot directly complete any actions in IHS, cannot complete all actions you need in IHS or you need some health related question clarified.

For example:

- to request a medical assessment of a health case when it is urgent
- to send additional information received from a client that you can't upload into a health case (e.g. the health case is in 'Awaiting Further Information' or 'Medical Opinion' state)
- for disputing information that were missed / not attached when the 'Not-ASH' health case was initially re-opened
- to clarify a final 'Not-ASH' decision e.g. for disputing information when you should not be re-opening the health case (refer to [SOP Request a reconfirmation for a disputed 'Not-ASH' medical opinion](#))
- to advise that a visa application has been withdrawn or declined (refer to [Advise HAT when a visa application is withdrawn or declined](#))
- any questions in regards to a health case or health condition of a client
- receipt of a Recognised Seasonal Employer (RSE) application that requires medicals, including receipt of a RSE paper medical
- paper medicals have been received from non-eMedical enabled countries and non-panel doctors
- any questions about eMedical / Immigration Health System (IHS)
- or any other health related query.

As HAT receives hundreds of email queries every week, for a variety of health related queries, they HAT request that all emails follow the structured format described below. It is important the email correspondence includes the specific subject category of your query so that it can be prioritised and actioned accordingly.

A Health Assessment Warning in AMS against the client will be a prompt to the IO to contact the HAT about a client's health. There will also be corresponding notes within the health case in IHS. Please note that HAT only place an AMS warning for 'ASH With Conditions', 'Deferral' and 'NOT-ASH' health outcomes. HAT also place an AMS warning for 'Incomplete' when they terminate a health case but the medical certificate is still valid.

For all other health case states or outcomes, IOs should be pro-actively checking IHS for all updates. Refer to [SOP Check the Health Case Status in IHS](#) and [Check the Health Assessment Outcome in IHS](#) for details.

Pre-requisites

You have:

- Checked for a health assessment warning in AMS
- Check the health case details and its status
- Looked at the relevant health case(s) in IHS for your client. Use the Client History Report and see if the client had a previous health case that needs to be considered in your query.
- Undertaken some actions in IHS but also need to advise the HAT via email of your request, or
- Determined that you cannot undertake any actions in IHS and confirmed that you need to contact the HAT with your request, or

Refer to the [SOP Communications to HAT](#) cheat sheet for details of each scenario.

Important Note: You should only email HAT when you have tried all other actions to resolve the issue yourself.

Steps

1. Create an email and consider why you are contacting the HAT

Consider what you need to do based on if you:

- have received further information from the client that you need to add forward to HAT because the health case is currently in 'Awaiting Further Requirements' or 'Medical Opinion' state, or
- need the health case to be reassessed where you aren't able to re-open the health case or it's in another state, or
- need clarification or help from the HAT that is health related, or
- have an urgent health related request or a Recognised Seasonal Employer (RSE), or
- have an application that is withdrawn or declined, or
- have received a paper medical.

Note: Check if there is a health assessment warning in AMS for the client. If there is, there will also be a corresponding note in the health case in IHS. The purpose of both (the IHS note and AMS health assessment

warning) is to provide clear communication from the HAT to visa processing branches. Warnings are only added for 'ASH With Conditions', 'Deferral' and 'NOT-ASH' for health outcomes.

2. Select the appropriate subject heading for your request from the list of categories below.

Select the appropriate heading from the list below and include this category within the subject line of your email along with the NZER (or NZHR reference number where no NZER exists) where this is a specific query about a case. Use the format described in these examples:

- REQUEST MEDICAL ASSESSMENT for NZER: N00000000
- TERMINATE HEALTH CASE for NZER: N00000000
- DISPUTING INFORMATION for NZER: N00000000
- *AFR RECEIVED for NZER: N00000000
- *** URGENT ATTENTION for NZER: N00000000
- CLARIFICATION REQUIRED for NZER: N00000000
- OPEN HEALTH CASE for NZER: N00000000
- RSE for NZER: N00000000
- PAPER MEDICALS
- OTHER

Refer to the [SOP Communications to HAT cheat sheet](#) for further help.

Note: *** For urgent requests please also cc: HAT Technical Advisor or HAT Immigration Manager.
*AFR - Awaiting Further Requirements

3. Complete all the required details for your query

Copy the table from the template below into the body of the email, and then complete all the required details (*) for your query.

NZER (or NZHR) *	[NZER is the preferred]
AMS Application Number*	
Client's Name*	
Visa Category / Visa Type*	<i>Temporary: Visitor / Student / Worker with job offer/ Worker without job offer Residence: Skilled/Business / Pacific Categories / Family / Humanitarian UNHCR / Humanitarian other Work to Residence: Worker / Family of worker</i> <i>[Select one Visa Category and Visa Type that applies for the Visa Category selected]</i>
Referral Type	General or Limited <i>[NOTE: Not required for Terminating a health case.]</i> <i>[select the one that applies]</i>
Length of Stay	Less than 6 months / 6-12 months / 12-24 months / More than 24 months <i>[Only required for Temporary visas (not residence including WTR) Not required for Terminating a health case.]</i> <i>[select the one that applies]</i>
Reason*	Provide a reason for your request along with information for the HAT so they know what you need.

Note: Refer to [SOP IHS Identifiers Cheatsheet](#) for details on which Visa Category/Type and Length of Stay combinations to use for the application you are processing or lodging.

Note: Complete what you can in the table above and provide any additional details of what you need in the body of the email to assist the HAT to be able to respond effectively where this is required. For most of the queries, you will not need to provide any further details other than the table above.
Remove all the wording *italics [this is for your information only]*.
For paper medicals that you are sending to HAT for uploading into IHS, you will not have a NZER or NZHR for it yet. Likewise for any query under the 'Other' category (which can be a general query not relating to as specific health case) you may not have a NZER or NZHR to refer to.

4. Attach any relevant medical tests and / or disputing information to the email (whatever you have received from the client or the doctor).

5. Update the "Identifiers" tab of the health case in IHS

Update the "Identifiers" tab of the health case in IHS with the required AMS visa application identifiers from AMS, where applicable, and the visa and referral details. Add in a "Referral Note" with information for the HAT or MA on the reason why you have updated the application and visa details and what you need have done next on the health case.

6. Send the completed email to HAT (HAT@mbie.govt.nz) and await their response.

7. Regularly refer to IHS for any updates for your query

Regularly check in IHS if your query has been resolved. Check the Health Status Report for updates to the health case(s) you have queried. Refer to [SOP Managing the Health Status report for the Office](#).

If it has not been resolved, then follow up with the HAT.

Process ends.

See Also

[Communications to HAT](#)

[Request a reconfirmation for a disputed 'NOT ASH' medical opinion](#)

[Cheatsheet - IO actions in IHS for communications to HAT](#)

[Advise HAT when a visa application is withdrawn or declined](#)