

Cheatsheet - IO actions in IHS for communications to HAT

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When to use

In certain situations you will be required to contact the HAT where an action cannot be done in IHS or it cannot be fully completed and HAT needs to be advised.

Use this guide to help you determine what action(s) you need to do in the Immigration Health System (IHS) when you have a health query or if you need to send an email query to the HAT instead of an action or as well as doing an action in IHS.

These actions in IHS communicate to the HAT what is required to be done next on the health case. The IO actions are:

- update the visa and referral details in the health case in IHS
- update the email address in IHS if the applicant opted into receiving email notifications
- re-open a health case and add attachments in IHS
- put a health case on hold (and add attachments) in IHS
- release a health case from on hold in IHS
- contact the HAT via email.

Also refer to guidance in the [IHS and Health](#) sections and [SOP Sending communications to HAT](#).

Role

- Immigration Officer (IO)
- Support Officer (SO)

Steps

1. Consider what you need to do based on if you:

- have an application that is withdrawn or declined, or
- have received a paper medical , or
- have something health related that is urgent or is a Recognised Seasonal Employer (RSE), or
- have received further information from client that you need to add to a health case in IHS, or
- need clarification or help from the HAT that is health related, or
- have received an application from client that needs the health case to be assessed or reassessed.

2. Consider the following in the table below to determine which actions to do in IHS and which subject line to use when needing to email the HAT:

| If the query is about... | then.... | and if you need to contact HAT then use this subject category in the email | Comments |
|--|---|--|--|
| an application that is withdrawn or declined | UPDATE IDENTIFIERS AND VISA DETAILS AND /OR EMAIL THE HAT | TERMINATE HEALTH CASE | You MUST email the HAT to finalise the health case. You may also need to update the Visa details. Important Note: Only update the visa application identifiers and visa details if the application number is incorrect. Please also check if there is another live application for the client that requires medicals and that is still open in AMS. If there is, then don't update the identifiers in IHS – just email the request to the HAT instead. If updating the visa details, add a 'Referral Note' with the reason for finalising the health case as incomplete. For example: "Application is withdrawn / declined. Please finalise incomplete health case assessment". Health case assessment outcome will be 'Incomplete'. |
| receipt of a paper medical that is not a RSE | EMAIL THE HAT | PAPER MEDICAL | You MUST email the HAT for receipt of paper medicals so that HAT can create a manual health case in eMedical. Then the Health case will then have a NZHR. |
| receipt of a Recognised Seasonal Employer (RSE) application that requires medicals, including receipt of a RSE paper medical | UPDATE IDENTIFIERS AND VISA DETAILS AND / OR EMAIL THE HAT | RSE | You MUST email the HAT if the health case is for a RSE as it is urgent. If a paper medical received, then you must email the HAT to create a manual health case in eMedical. Then the Health case will have a NZHR. If a health case for the RSE is already in IHS, then update the visa application identifiers and visa details as required. When updating the visa details, add a 'Referral Note' with the reason for urgent. For example: "RSE application received. Please assess health case by xxxx". |
| a health related matter that is urgent but is not a RSE | UPDATE IDENTIFIERS AND VISA DETAILS AND EMAIL THE HAT ALSO MAY NEED TO <ul style="list-style-type: none">• RE-OPEN HEALTH CASE OR• RELEASE HEALTH CASE FROM HOLD | URGENT ATTENTION | You MUST email the HAT if the health case is urgent. You may also need to re-open the health case or release it from on hold and update the visa application identifiers and visa details as required. When updating the visa details, add a 'Referral Note' with the reason for urgency and what is required. For example: "Application is urgently required for [reason]. Please prioritise health case assessment by xxx". |

3. If your query is not covered by the above scenarios, then consider any AMS warnings, the health case status in IHS and if there is a health outcome.

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

Use the table below to help you determine what to do next:

| If Health Case status is... | and there is an AMS Warning... | and the Health Case Assessment Outcome is... | and you | then.... | and if you need to contact HAT then use this subject category in the email | Comments |
|-------------------------------|--------------------------------|--|--|--|--|--|
| Awaiting Further Requirements | NO | none | have received the further requirements that need to be added to the health case | UPDATE IDENTIFIERS AND VISA DETAILS AND EMAIL the HAT | AFR RECEIVED | You MUST email the HAT as IO users can't add attachments to a health case when it's in 'AFR' state. You can also update the visa application identifier and visa details if required. When updating the visa details, add a 'Referral Note' with the reason for updating the health case in AFR state. For example: <i>"New information received sent via email. Updated for Residence application. Please complete assessment."</i> |
| Medical Opinion | n/a | none | need clarification or help from HAT | EMAIL THE HAT | CLARIFICATION | You MUST email the HAT as IO users can't do any actions to a health case when it's in a 'Medical Opinion' state. |
| Open | n/a | none | need clarification or help from HAT | UPDATE IDENTIFIERS AND VISA DETAILS AND EMAIL THE HAT | OPEN HEALTH CASE | You MUST email the HAT if the health case is still in 'Open' state in IHS to let the HAT know that there is a live visa application for a health case yet to be submitted for assessment. Update the visa application identifier and visa details as required. When updating the visa details, add a 'Referral Note' with the reason for updating the health case in an 'Open' state. For example: <i>"Visa application received. Please refer health case for assessment."</i> Note that the health case cannot be assessed until all medical information has been submitted from eMedical into IHS. Follow up with the client if required. Refer to SOP Check the Health Case Status in IHS . |
| Hold | NO | none | need a medical referral for a health case that is on hold (and may have received additional information) and / or have received the visa application | UPDATE IDENTIFIERS AND VISA DETAILS AND ADD ATTACHMENTS (IF REQUIRED) AND RELEASE FROM HOLD | n/a | You MUST update all the visa application identifiers and visa details as required. Then you can attach any further information and release the health case from on hold. Refer to SOP Release a health case from on hold in IHS . Note: There is no need to email the HAT as an IO user can update the visa details and add attachments. When updating the visa details, add a 'Referral Note' with the reason for releasing the health case from on hold. For example: <i>"Visa application received. Please refer health case for Residence assessment."</i> <i>"Additional information attached. Please refer health case for Temporary assessment."</i> |
| Manual Assessment | NO | none | need a medical referral for a health case | UPDATE IDENTIFIERS AND VISA DETAILS | n/a | You MUST update all the visa application identifiers and visa details as required. Note: There is no need to email the HAT as IO user can update the visa details. When updating the visa details, add 'Referral Note' with the reason for updating the health case. For example: <i>"Visa application received. Please refer health case for Residence assessment."</i> |
| Manual Assessment | YES (AWC) | none | need medical referral for a AWC health case and / or have received further information | UPDATE IDENTIFIERS AND VISA DETAILS AND / OR PUT CASE ON HOLD (AND UPLOAD ATTACHMENTS) AND RELEASE FROM HOLD | n/a | You can update all the visa application identifiers and visa details as required. You can also put the health case on hold to upload any further information received. Then release from hold to continue the assessment. Important Note: The most likely scenario is that the client will submit a new health case for the additional test instead of adding to the AWC assessed health case. If this scenario you will update visa application identifiers and visa details of the 'Manual Assessment' health case and HAT will assess it the new case with the previous AWC case. When updating the visa details, add a 'Referral Note' with the reason for updating the health case. For example: <i>"Further information received for AWC. Please refer for assessment with NZER xxxx."</i> <i>"Subsequent application received. Please refer for assessment with NZER XXX."</i> Note: An email the HAT is no longer required. |
| Manual Assessment | NO | none | need an assessment put on hold for a specific visa application | UPDATE IDENTIFIERS AND VISA DETAILS AND PUT CASE ON HOLD | n/a | You may put the health case on hold if the application is on hold for some reason, so that the health assessment can be paused. A reason for putting the case on hold needs to be added. You MUST update the visa application identifiers and visa details if you do so. When updating the visa details, add a 'Referral Note' with the reason for putting it on hold. |
| Assessed | NO | ASH | need a new medical referral for a health case that is assessed as ASH | UPDATE IDENTIFIERS AND VISA DETAILS OR UPDATE VISA DETAILS AND REOPEN HEALTH CASE (AND ADD ATTACHMENTS) | CLARIFICATION | You can reopen the health case if required for a new assessment. You must update the visa application identifier and visa details when you do so. Important Note: Only re-open health case if client's health status has changed or the health case needs an assessment under different category. THERE IS NO NEED TO RE-OPEN THE HEALTH CASE if you are using this for a new application and the assessment meets the health requirements for the visa application. You should still update the visa application identifiers and visa details as required. Refer to SOP Check the Health Assessment Outcome in IHS . When updating the visa details, add a 'Referral Note' with the reason for re-opening the health case. For example: <i>"New visa application received for Residence. Please refer for new assessment."</i> Note: An email to the HAT is no longer required unless you need clarification. |

| | | | | | | |
|----------|----------------|--|--|---|-----------------------|---|
| Assessed | NO | Auto-assessed as ASH (Prior to August 2018) OR ASH With Conditions (Temporary) OR ASH- (Temporary & Residence) | have received a Temporary or Residence or Work to Residence application | UPDATE IDENTIFIERS AND VISA DETAILS (PLEASE DO NOT RE-OPEN THE HEALTH CASE) – THE HEALTH CASE WAS AUTO CLEARED AS ASH MEANING IT'S ASH FOR ALL VISA TYPES REGARDLESS OF THE VISA CATEGORY ENTERED UNDER THE IDENTIFIERS IN (EMEDICAL) | CLARIFICATION | DO NOT RE-OPEN THE HEALTH CASE. Update the visa application identifiers and visa details as required. When updating the visa details, add a 'Referral Note' with reason for updating the auto-assessed health case. For example: "Temporary visa application received. Auto-assessed ASH outcome applied." Important Note: Only email the HAT if the applicant has declared any medical conditions in their application form. Refer to SOP Check the Health Assessment Outcome in IHS and FAQs - 'Auto-Assessed' health cases. |
| Assessed | YES (AWC) | ASH with conditions | need a new medical referral for a health case that is assessed as AWC and / or have received additional information for a previous AWC | UPDATE IDENTIFIERS AND VISA DETAILS AND REOPEN HEALTH CASE (AND ADD ATTACHMENTS) | CLARIFICATION | You can re-open the AWC health if required, to add in new information received and have the health case reassessed. In this scenario, update the visa application identifiers and visa details as required. When re-opening, select the 'Previous ASH with Conditions outcome' reason. Make sure to add the new information as an attachment after you have re-opened the health case. Refer to FAQs - Re-opening health cases in IHS. Important Note: If the client has submitted a new health case for the AWC additional tests, then DO NOT RE-OPEN or UPDATE THE VISA DETAILS FOR THE ASSESSED AWC HEALTH CASE. You will update the visa application identifiers and visa details of the new health case instead and HAT will assess the new health case with the previous AWC case. Note: An email to HAT is no longer required unless you need clarification. |
| Assessed | YES (Deferral) | Deferral | Have received the deferral information | REOPEN HEALTH CASE (AND ADD ATTACHMENTS) AND UPDATE IDENTIFIERS AND VISA DETAILS | DEFERRAL | You can reopen the health case AFTER THE DEFERRAL INFORMATION IS RECEIVED. Update the visa application identifiers and visa details then add attachments. When updating the visa details, add 'Referral Note' with "New information for deferral conditions attached. Please complete assessment. "Select the re-open reason of Disputing/deferral information received" - Refer to FAQs - Re-opening health cases in IHS. Note: An email to the HAT is no longer required. |
| Assessed | YES (NOT-ASH) | NOT ASH | have received disputing information or another visa application | REOPEN HEALTH CASE AND ADD ATTACHMENTS AND UPDATE IDENTIFIERS AND VISA DETAILS | DISPUTING INFORMATION | You can update the visa application identifiers and visa details as required, then reopen the Not-ASH health case for a new referral. When updating visa details, add 'Referral Note' with "Disputing information attached. Please refer for reconfirmation of Not ASH opinion for Residence." Select the re-open reason of Disputing/deferral information received" - Refer to FAQs - Re-opening health cases in IHS. Important Note: An email to the HAT is no longer required unless you have missed some disputing information when it was previously re-opened for a previous assessment. Refer to SOP Request a reconfirmation for a disputed 'NOT ASH' medical opinion. |
| Assessed | No | Incomplete | Have received further information or a visa application for an incomplete health case | UPDATE IDENTIFIERS AND VISA DETAILS AND REOPEN THE HEALTH CASE (AND ADD ATTACHMENTS IF REQUIRED) OR EMAIL THE HAT | CLARIFICATION | Where there is no AMS warning, medicals in health case have either expired or a different health case has been used for the client's health assessment. You MUST check in IHS for details to find the correct health case as there may be a different health case being assessed for the application instead. In this scenario, DO NOT UPDATE THE VISA DETAILS OR REOPEN the 'Incomplete' Health case. If the medical certificate has expired, and you are willing to still accept this for the application, you can re-open the health case. Select the re-open reason of 'expired medical - IO accepting as ETI'. However if the health case is still valid for the current application, then select the re-open reason of previous health outcome of 'Incomplete' and new visa application accepted" - Refer to FAQs - Re-opening health cases in IHS. Important Note: If the applicant has multiple health cases that are incomplete, only re-open the one that is valid or the most recent health case if accepting it as an ETI. Email the HAT in exceptions where you need clarification. |
| Assessed | Yes | Incomplete | Have received further information or a visa application | UPDATE IDENTIFIERS AND VISA DETAILS AND REOPEN HEALTH CASE (AND ADD ATTACHMENTS IF REQUIRED) OR EMAIL THE HAT (IF REQUIRED) | CLARIFICATION | Where there is an AMS warning, medicals were still valid at the time the health case was finalised as Incomplete. The medicals may also have expired when the visa application is received. Select the re-open reason of 'expired medical - IO accepting as ETI' with the following Referral Note: "Health case re-opened and [expired] medicals accepted by [IO name] for the new application received." Important Note: If the applicant has multiple health cases that are incomplete, only re-open the health case that is valid. Email the HAT in exceptions where you need clarification. |

- If your query is something else and is not covered in any of these actions listed above, then use the category "OTHER" and email the HAT.

See Also

Communications to HAT

Request a reconfirmation for a disputed 'NOT ASH' medical opinion

Sending communications to HAT

Advise HAT when a visa application is withdrawn or declined

Advise HAT when a visa application is withdrawn or declined

Note: This replaces the guidance in the INZKit Staff toolkit "The visa application is withdrawn or declined" found under Health & Character (e.g. <http://inzkit/publish/toolkits/ACB/i517.htm>)

When to use

Use this procedure to advise the HAT when a visa application has been withdrawn or declined for reasons other than health and the health case in the Immigration Health System (IHS) had not yet been assessed or the assessment has not been completed.

Role

Immigration Officer (IO)

Prerequisites

- Visa application that requires medicals has been withdrawn (on client request) or a decision has been made to decline the visa application for reasons other than health
- Medicals are available in the Immigration Health System (IHS) and they have not yet been assessed or assessed completely.

Context

A visa application that requires medicals may be declined or the client may withdraw the application. The officer responsible for assessing an application will decide whether or not the application will be declined. They will also process an application that is to be withdrawn upon request of the client. Refer to SOPs relevant to your business, for example, [Withdraw application](#) for SMC.

In either of these scenarios, where the IHS health case for that application has not yet been assessed (i.e. it has no 'assessment outcome' in IHS), the officer responsible (the IO) will need to contact the HAT in writing (email HAT@mbie.govt.nz) as soon as possible to advise them that the visa application has been declined or withdrawn for reasons other than health and unlink the application if the function is available. The client's details need to be provided as part of this request.

HAT will stop the processing of the health case, removing the case from the medical assessment queue (for referral to a Medical Assessor) or from any other queues as required (for example, cancelling any further requirements requested and updating the eMedical system if required). The HAT will then finalise the health case (i.e. the health case will have an assessment outcome of 'Incomplete' for that specific visa category) and no further assessment of the health case will take place as part of the application.

The officer responsible for the assessment of the visa application may then record the health outcome in the AMS Health Details for the application as 'Terminated' and complete the processing of the visa.

Note: An 'Incomplete' health case assessment outcome in IHS means the same as a 'Terminated' in AMS.

Steps

1. Determine whether or not the case has been assessed

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

Does the case have an assessment outcome?

| If the health case... | Then... |
|-----------------------|--|
| Assessed | <p>You do not need to advise HAT that the visa application is declined or withdrawn.</p> <p>If the health case has already been assessed (ASH, Not-ASH, ASH with conditions, or Deferral) and the visa application is to be declined or withdrawn, then the decision stands for the health case in IHS (the case will not be finalised as incomplete). For this scenario, you will record the health outcome from the health case as it was assessed.</p> <p>Record the health outcome within the Health Details in AMS from the IHS health case as it was assessed (e.g. ASH, ASH with conditions etc).</p> <p>Refer to SOP Recording Health Details in AMS.</p> <p>Process ends.</p> |
| Not assessed yet | <p>The assessment process can be stopped so the health case can be made 'Incomplete'.</p> <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p>Note: Contact the HAT if the health case is in an 'Open', 'Awaiting Further Requirements', 'Medical Opinion', 'Hold' or 'Manual Assessment' state and unlink the application from the health case in IHS if the function is available.</p> </div> <p>Go to step 2.</p> |

2. Contact HAT with request to stop assessment and terminate case

You will need to contact the HAT in writing via email (HAT@mbie.govt.nz) to advise that the application has been withdrawn or declined for reasons other than health, stop the assessment and finalise the health case (i.e. no further assessment is required). Advise the HAT if this is urgent.

When making the request, you must include the NZER number (or NZHR if no NZER) with "TERMINATE HEALTH CASE" in the subject line of your email like this:

- "TERMINATE HEALTH CASE for NZER: N00000000".

Complete the details of the request using the following template in the body of the email including a brief reason:

| | |
|---------------------------|--|
| NZER (or NZHR) | [NZER is the preferred] |
| AMS Application Number | |
| Client's Name | |
| Visa Category / Visa Type | <p>Temporary: Visitor / Student / Worker with job offer / Worker without job offer / Residence: Skilled/Business / Pacific Categories / Family / Humanitarian UNHCR / Humanitarian other</p> <p>Work to Residence: Worker / Family of worker</p> <p>[Select one Visa Category and Visa Type that applies for the Visa Category selected]</p> |

| | |
|---------------|---|
| Referral Type | General or Limited <i>[select the one that applies]</i> |
| Reason | <i>[Add in the reason you are requesting the health case assessment is to be terminated. e.g. "Application is withdrawn / declined. Please terminate health case assessment". This is to inform the HAT of what needs to be done next for the health case.]</i> |

* 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: If a health case is terminated it may not be valid to be re-used for future applications. See A4.25.c and A4.20.d.

3. Update the 'Identifiers' tab in the health case

Update the 'Visa Details' tab in the health case in IHS with the AMS Client ID, and a 'Referral Note' to advise that the application is withdrawn or decline. Update the Application Details (Application Source, Application Date, Visa Category, Type, Length of Stay, and Intended work activity if applicable).

Important Note: Please check if there is another live application for the client that requires medicals that is still open in AMS. If there is, then please don't update the identifiers in IHS – just email the request to the HAT instead.

4. Wait for health case to be terminated

You will need to wait for HAT to finalise the health case. This may take some time if the health case has further requirements prescribed which impacts the eMedical system.

Track the status of the health case to check when it has been finalised as 'incomplete'). Follow up with HAT as required.

Note: The HAT will leave a note in IHS when they have finalised the health case to notify branch that the case is still valid until a specific date (the medical expiry date). If the client reapplies before that date, then the health case can be reopened to be assessed for the new application.

5. When the case is finalised as 'incomplete'

Complete the processing of the visa as required when the assessment is terminated. You will record the Health Outcomes as 'Terminated' in AMS. Record your actions in AMS as required.

Note: If you are declining the application, advise the client that their health status will need to be assessed for future applications, and they may be required to obtain a new medical certificate.

Process ends.

Other references

Refer to "What do I need to do if the application with medicals is to be declined?" in the [AMS Health Details FAQs / Determination process changes](#).

See Also

- [Communications to HAT](#)
- [Request a reconfirmation for a disputed 'NOT ASH' medical opinion](#)
- [Sending communications to HAT](#)
- [Cheatsheet - IO actions in IHS for communications to HAT](#)

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Recording Health Details in AMS

When to use

Use this procedure to record the Health Details (NZER or NZHR and Health Outcome) from a health case in the Immigration Health System (IHS) against an applicant's visa application within AMS to complete the health lodgements process.

This procedure may be used during the processing of a visa, during Lodgements or later at Determination.

Role

All roles that process visa applications within AMS

Prerequisites

- Application has met lodgement requirements
- Identified that a medical and/or chest x-ray certificate needs to be or has been provided for the application
- The health case for the medical and/or chest x-ray certificate has been located in IHS (NZER or NZHR reference number)
- The medical and/or chest x-ray certificate in IHS (NZER number) is valid (less than 3 months old, or the applicant has provided a medical certificate with a visa application in the past 36 months where the applicant was deemed to have an acceptable standard of health)
- Health Details for the applicant need to be recorded in AMS
- The application is open in AMS

Context

Medical and/or chest x-ray certificates are received as health cases in IHS. The client should provide the NZER information sheet from the eMedical panel physician with their application unless a valid certificate has been submitted with a previous visa application and is available in IHS.

The information in the health case is used to determine whether or not a client meets the health requirements. During lodgement and assessment you will be required to check the type of medical certificate that has been submitted within IHS to determine whether or not it is valid to be accepted with the visa application you are processing. If the certificate is valid, you will be required to record the Health Details for the applicant in AMS.

The Health Details to be recorded in AMS consist of two parts:

- The NZER (the eMedical Reference Number) or the NZHR (the IHS Health Case Reference Number) where a health case does not have a NZER, and
- The Health Outcome of the health case, if it has been assessed at the time you are lodging or processing the application.

Health Details may be added to the applicant's application during Lodgements or post-Lodgements during the processing of a visa or added later at Determination.

Where a Health Outcome is not available at Lodgement, partial Health Details (NZER or NZHR) can be recorded so that the Lodgement process can be completed. The Health Outcome can be added later at Determination.

You will need to record the Health Details (NZER or NZHR and Health Outcome from an IHS health case) against each applicant's application in AMS. Each applicant that requires a medical for the visa application must have Health Details recorded before the application can pass the validation criteria at Determination.

This procedure is also a sub-process of the health lodgements. Refer to SOPs:

- [Complete Lodgement for BDC and Immigration ONLINE applications](#)
- [Lodging a Paper Based Temporary Visa Application](#)
- [SMC Lodge application \(Paper Lodgement \(SMC\), <http://inzkitt/publish/globalprocessmanual/#65898.htm>\)](#)
- [Receive and Lodge Family Category application](#)

Important Notes:

- Only add the Health Details for a medical and/or chest x-ray certificate to the application after all lodgement requirements have been met.
- Health Details should not be recorded in AMS if the application is being "accepted" as an exception to the normal medical lodgement requirements.
- A waiver is required if a medical and/or chest x-ray is/are accepted for lodgement purpose under special circumstances. If in doubt, please check with Technical Advisor and/or Immigration Manager.

In This Section

- [Record Health Details at Lodgements or Determination](#)
- [Record IHS medical certificates as Health Details in AMS](#)
- [When are Health Details added in AMS](#)
- [AMS Health Details FAQs](#)
- [Known issues in AMS](#)

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](#)

[Client History Report Process](#)

[Communications to HAT](#)

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

[FAQ](#)

[IHS Training Videos](#)

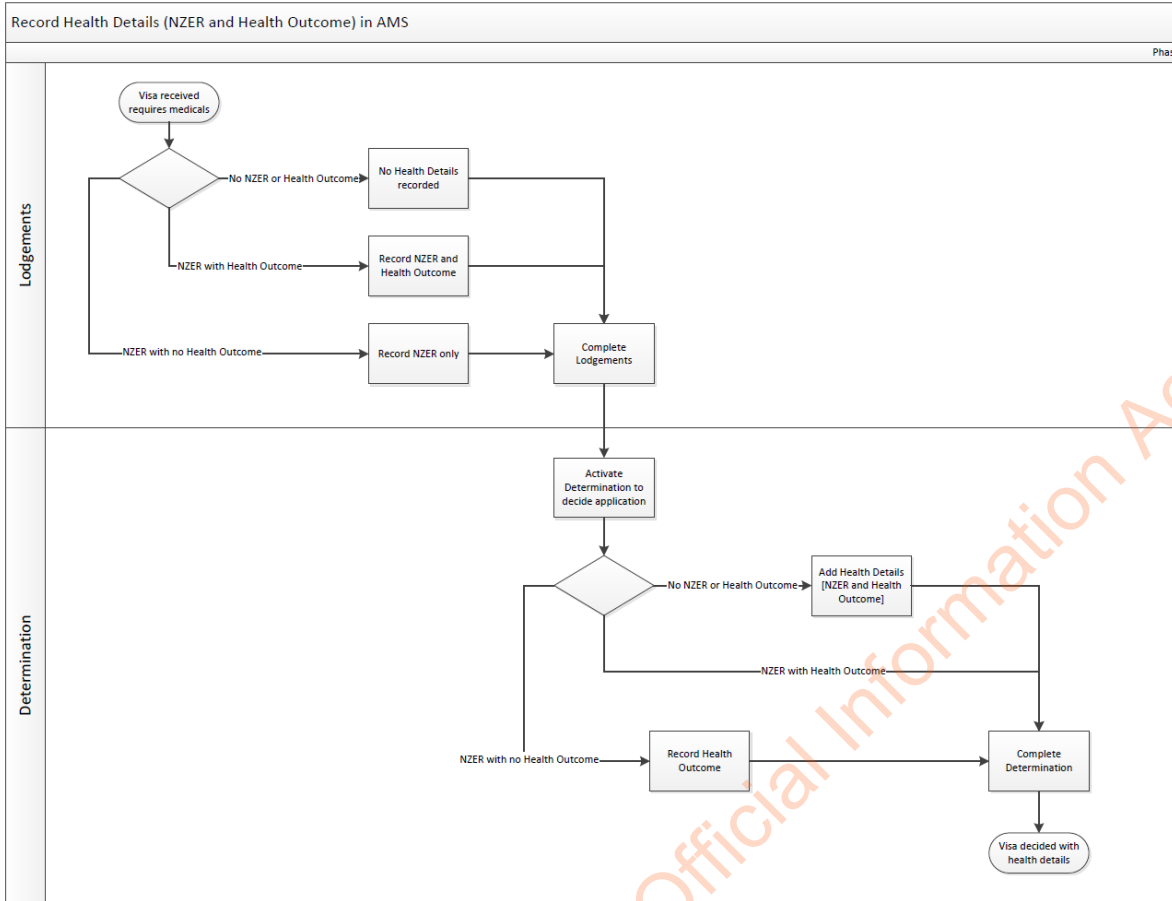
[Immigration Health System \(HAT\)](#)

[Hidden Footnotes](#)

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Record Health Details at Lodgements or Determination

The following diagram shows the Health Details recorded at Lodgements and Determination



See Also

- [Recording Health Details in AMS](#)
- [Record IHS medical certificates as Health Details in AMS](#)
- [When are Health Details added in AMS](#)
- [AMS Health Details FAQs](#)
- [Known issues in AMS](#)

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Record IHS medical certificates as Health Details in AMS


When to use

When an applicant requires a medical for their visa application, the Health Details (NZER or NZHR and Health Outcome) from a health case in the Immigration Health System (IHS) need to be recorded against the applicant's application in AMS to complete the lodgement and / or determination processes.

Context

Where the NZER (eMedical health case reference number) for the applicant is already known (e.g. the applicant has provided the NZER info sheet with their application or there is a known previous health case in IHS), you can add the NZER to the Health Details for the applicant's new application. Otherwise, you will need to search in IHS to find a relevant health case for the applicant.

If the client has provided the NZER info sheet with their application, then you can record this within the Health Details first.

An NZER will enable the search of IHS via the IHS quick launch button  in the AMS toolbar to find the matching health case for the applicant.

Important Notes:

- Only add the Health Details for a medical and/or chest x-ray certificate to the application after all lodgement requirements have been met.
- Health Details should not be recorded in AMS if the application is being "accepted" as an exception to the normal medical lodgement requirements.
- A waiver is required if a medical and/or chest x-ray is/are accepted for lodgement purpose under special circumstances. If in doubt, please check with Technical Advisor and/or Immigration Manager.

Prerequisites

- Application has met lodgement requirements
- Identified that a medical and/or chest x-ray certificate needs to be or has been provided for the application
- The health case for the medical and/or chest x-ray certificate has been located in IHS (NZER or NZHR reference number)
- The medical and/or chest x-ray certificate in IHS (NZER number) is valid (less than 3 months old, or the applicant has provided a medical certificate with a visa application in the past 36 months where the applicant was deemed to have an acceptable standard of health)
- Health Details for the applicant need to be recorded in AMS
- The application is open in AMS

Steps

1. Determine if the health details for the applicant are already known

| If ... | Then... |
|--|--|
| The NZER for the applicant is not known | You will need to locate the relevant health case in IHS and find the NZER and Health Outcome. Go to Step 2. |
| The applicant has provided the NZER info sheet with their application or the NZER of the previous valid health case is known | You can record the NZER directly into the applicant's Health Details in AMS. Go to Step 6. |

2. Search and locate the relevant health case in IHS

Go to IHS to find the relevant health case for your applicant. You can do this from the 'AMS - Application Details' or from the 'AMS - Client Details' summary view.



Use the quick launch button  in the AMS toolbar to find a matching health case for the applicant.

Modify the search criteria in IHS if required to locate the health case that is relevant for the applicant's application:

- Use this procedure to search and find the relevant health case in the Immigration Health System (IHS). Refer to [SOP Searching for a Health Case in IHS](#).
- Use this procedure to locate previous health cases for the applicant. Refer to [SOP View the Client History Report](#).

Determine your next step:

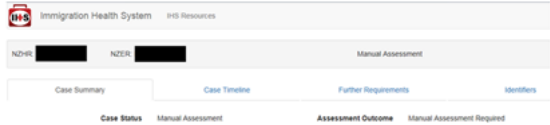
| If a Health Case is | Then... |
|---------------------|---|
| Located | Go to Step 3. |
| Not located | <p>If no health case for the applicant is found in IHS, you may need to:</p> <ul style="list-style-type: none"> • follow up with HAT to check if a case is still open in eMedical and is not yet submitted to IHS, or • contact the client to ask them to submit the medicals, or • search for a previous paper medical for the client that is valid to reuse for the new application as an exception procedure, or • RFL the application. <p>Follow the standard lodgements procedures required to:</p> <ul style="list-style-type: none"> • Request further information, or • Complete a document waiver / Waive the medicals (if applicable), or • Proceed with the Return Failed Lodgement process. <p>Process ends.</p> |

3. Review the health case in IHS to find the Health Details

You will need to review the health case details in IHS to identify the relevant health details to add to the applicant's application in AMS.

- You must always check the health case to determine if it is still valid for the application (not expired) and if the health case has the right medical certificates. If the health case has expired, then the applicant may need to submit new medicals. To check what medical certificates are included in a health case, refer to [SOP Checking Medical Certificates in IHS](#).
- Determine the status of the health case. If it is assessed, then it will have a health assessment outcome. Refer to [SOP Check the status of the health case in IHS](#).
- Determine the assessment outcome of the health case. Also check if the health case has a previous health assessment that can apply. Refer to [SOP Check the Health Assessment Outcome in IHS](#) for guidance on what each health assessment outcome in IHS means.

In the 'Case Summary' tab of an IHS health case, locate the NZER number and Health Outcome of the health case (medical and/or chest x-ray certificate).

| AMS Health Details fields | Corresponding IHS information |
|---------------------------|--|
| NZER or NZHR | <p>The NZER (the eMedical Reference Number) or the NZHR (the IHS Health Case Reference Number) if a NZER doesn't exist, are in the top left of the grey banner of the health case:</p>  <p>The screenshot shows the IHS Case Summary tab with a grey banner at the top containing 'NZER [redacted]' and 'NZHR [redacted]'. Below the banner are tabs for 'Case Summary', 'Case Timeline', 'Further Requirements', and 'Identifiers'. At the bottom, there are sections for 'Case Status', 'Manual Assessment', 'Assessment Outcome', and 'Manual Assessment Request'.</p> |
| Health Outcome | <p>The Health Outcome to be recorded within the AMS Health Details is the 'Assessment Outcome' in IHS.</p> <p>Check the 'Assessment Outcome' section in the 'Case Summary' tab to view the latest health case assessment outcome. 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.</p> |

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

Client History **Assessed - ASH with Conditions (Temporary)**

Case Summary Case Timeline Further Requirements Identifiers

Case Status Assessed **Assessment Outcome** ASH with Conditions (Temporary)

Medical Completion 26/07/2018 **Medical Expiry** 26/10/2018

Manual Assessment Yes **Medical Certificate** Chest X-Ray only

X-ray Supplied Yes

Latest Assessment Conditions added an FR that is conditional

Latest Assessment Note

Attachments - Medical Cert - Copy - Client Declaration.pdf

Clinic Countries - New Zealand

If the assessment outcome shows 'Manual Assessment Required' then the health case is not yet assessed or is being re-assessed. Check in the 'Case Timeline' tab if there is a previous assessment in the health case that can be applied to your application.

s9(2)(a) of the OIA

Client History Assessed - ASH with Conditions (Temporary)

Case Summary Case Timeline Medical History Health Requirements HAT Assessment MA Opinion Further Requirements

Outcome History

| Username | Date | Outcome | Visa Category | Visa Type | Visa Application # | Referral Type |
|-------------------|------------------|---------------------|-------------------|-----------|--|---------------|
| ihs_st_ha_admin_1 | 26/07/2018 23:34 | ASH with Conditions | Temporary | Visitor | s9(2)(a) of the OIA s9(2)(a) of the OIA | General |
| ihs_st_ha_admin_1 | 26/07/2018 23:25 | ASH | Work to Residence | Worker | | General |

Determine your next step:

| If a health case 'Assessment Outcome' is... | Then... |
|---|--|
| Available | The health case has been assessed (ASH, ASH with Conditions, Not ASH), has been deferred (Deferral) or the assessment has been terminated (Incomplete). Refer to SOP Check the Health Assessment Outcome in IHS for guidance on what each health assessment outcome in IHS means. Go to Step 4. |
| Not available | An outcome is yet to be determined as the health case is not assessed yet and is in one of these states: it is waiting to be submitted ('Open'), it is 'Awaiting Further Requirements', it is on 'Hold', or it is waiting to be finalised by HAT ('Manual Assessment Required'). The 'Assessment Outcome' may be 'Manual Assessment Required' You will need to update the health case with the visa application number, client Id and the Visa Details in the Identifiers tab. Go to Step 5. Note: The application in AMS can be progressed without a Health Outcome at Lodgements and can be added later at Determination before the visa is decided. |

4. Determine if the health assessment is appropriate for visa application being lodged or assessed

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

You must check if the health assessment outcome and the criteria used to decide it is applicable for the application type, before you can add the Health Details in AMS. Check the 'Outcome History' table tab of the 'Case Timeline' tab for details of the assessment and any previous assessments (in case they can be applied).

To ensure that the health case assessment outcome can be applied to the application in AMS, check the following:

- Is it auto-cleared as ASH for all visa types?
- Is it ASH only for Temporary applications?
- Is it ASH for Residence only?
- Is it ASH with conditions? If yes, is this for the current visa application type?
- Does it only apply to Limited criteria?
- Does the intended length of stay in IHS align with the visa 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.

Refer to [SOP Check the Health Assessment Outcome in IHS](#) for further guidance on what each health assessment outcome means. Refer to [FAQs- 'Auto Assessed' health cases](#) to identify if the health case has been auto-assessed.

Talk to your Technical Advisor to help with determining if the outcome is applicable to the application where you are unsure if a health assessment can be applied to an application.

Email the HAT (HAT@mbie.govt.nz) for any questions for your case.

Note: If a health case is assessed as 'Incomplete' (the health assessment was terminated) it may not be valid to be re-used for future applications. See A4.25.c and A4.20.d.

Confirm if the health case and its details are sufficient to continue processing the application:

| If the health case information is... | Then... |
|--------------------------------------|---|
| Not sufficient | <p>Review health case details in Full View. Refer to SOP Accessing Health Case 'Full View in IHS'.</p> <p>Determine next step:</p> <ul style="list-style-type: none"> • Client needs to submit new medicals. Process ends. • The health case may need to be reassessed for the new application. Go to Step 5. |
| Sufficient | <p>The health case details can be recorded in AMS for the application you are lodging or assessing.</p> <p>Update the Application Identifier and Visa Details within the health case in IHS</p> <ul style="list-style-type: none"> • First you will need to update the visa details in the 'Identifiers' tab in the health case in IHS with the visa application number, client Id and the Visa Category, Visa Type, Referral and Type Length of Stay (for temporary) for the application you are lodging or assessing. • 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, if anything. This is instead of emailing the HAT when the visa application is accepted. Refer to SOP Update the visa details in a health case in IHS and FAQs – Visa Details in IHS for how to do this. <p>Go to Step 6 to record the 'Health Details' in AMS.</p> <div style="background-color: #e0e0e0; padding: 5px;"> <p>Note: It is important that the 'Identifiers' tab in IHS is updated with the relevant AMS identifiers (AMS Client Id and AMS Application number) and Visa Details (Visa Category, Visa Type, Referral Type and Length of Stay (for temporary visas)). If applicable, return to the 'Identifiers' tab and enter the relevant details in the respective text fields and click 'Save'.</p> </div> |

5. Request the IHS health case is assessed for a specific visa application

Where a health case needs to be assessed for an application (the health case has no 'assessment outcome'), or it needs to be reassessed under different assessment criteria, then you can action this in IHS.

Update the 'Identifiers' tab in the health case in IHS with the application identifiers and visa details for the application you are lodging or assessing:

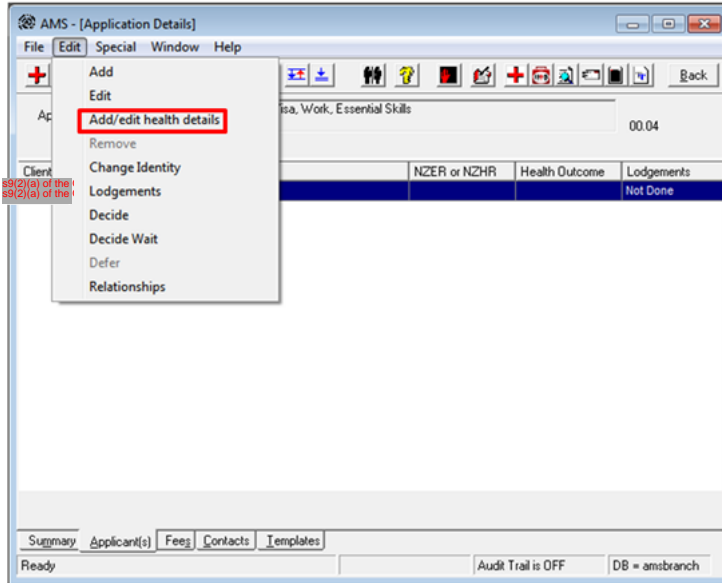
- Update the visa application number and client Id (and person Id if applicable).
- Update the Visa Category, Visa Type, and Referral Type and Length of Stay (if for temporary) Refer to [SOP Update the visa details in a health case in IHS](#) and [FAQs – Visa Details in IHS](#) for how to do this.
- Re-open the health case for a new assessment if required. You must update the application identifiers, visa details and include a 'Referral Note' in the 'Identifiers' tab of the health case before you re-open it. Refer to [SOP Re-open a health case in IHS](#).
- Release the health case from on hold if required. You must update the application identifiers, visa details and include a 'Referral Note' in the 'Identifiers' tab of the health case before you release it. Refer to [Release a health case from on hold in IHS](#).
- Add a 'Referral Note'. Enter any information into this field that you would like to advise the HAT or MA regarding the assessment required. Add some details for why you are updating the Visa Details to advise and what you need to them to do with the health case next. This is instead of emailing the HAT when the visa application is accepted in AMS to trigger a medical assessment.
- Check all relevant details are entered in the respective text fields and then click 'Save'.
- Go to Step 6 to record the 'Health Details' in AMS.

Note: It is important that the 'Identifiers' tab in IHS is updated with the relevant AMS identifiers (AMS Client Id and AMS Application number) and Visa Details (Visa Category, Visa Type, Referral Type and Length of Stay (for temporary visas)).

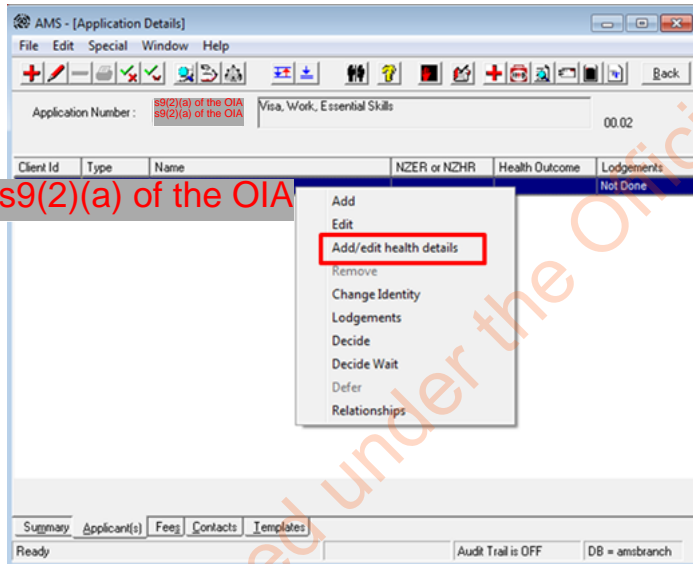
A 'Referral Note' is required to notify the HAT or the MA for any action that you do on the health case, such as 're-open, release from on hold, and /or update the visa details. This information will inform the HAT or MA what they need to do next on the health case.
Return to the 'Identifiers' tab and enter the relevant details in the respective text fields and click 'Save'

6. Open the 'Add/edit health details' for the applicant's application in AMS to record the 'Health Details' in AMS

To open the 'AMS Health Details' dialogue box for an applicant, go to the Applicant(s) tab and select the applicant. In the 'Edit' menu of the 'AMS - Application Details' screen, select the 'Add/edit health details' option from the drop-down list.



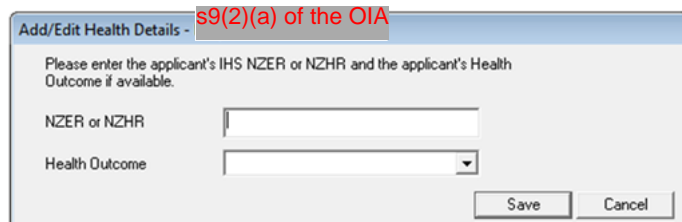
Or right click on the applicant's application and select 'Add/edit health details' from the drop-down list.



Note: Where a client has more than one identity, ensure that the health details have been created under the correct identity so that the client's health history is complete.

7. Record the Health Details of the applicant's application in AMS

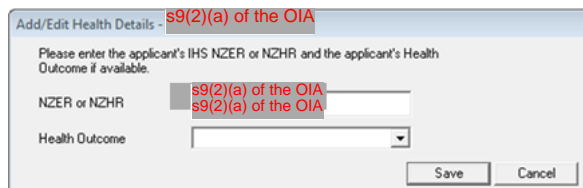
In the 'Add/Edit Health Details' pop-up box, record the NZER number and Health Outcome (if known) of the IHS health case into the applicant's application in AMS.



You must enter the NZER or NZHR in the 'NZER or NZHR' field in the correct format:

| Type | Format |
|------|---|
| NZER | The NZER must be recorded with a capital N followed by nine (9) numerals. |

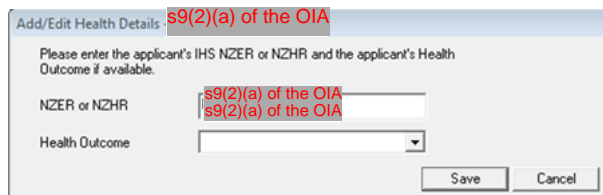
In the 'Add/Edit Health details' pop-up box, it will look like this:



NZHR

The NZHR must be recorded with a capital HR followed by seven (7) numerals.

In the 'Add/Edit Health details' pop-up box, it will look like this:

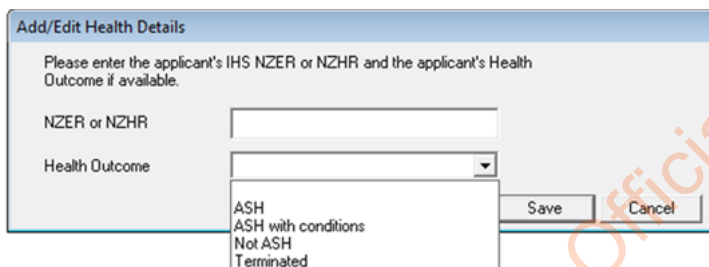


Note: A NZHR (IHS health case reference number) may be recorded where the health case does not have a NZER. Only record a NZHR when the health case in IHS does not have a NZER.

8. Add the 'Health Outcome' to the applicant's health details

Identify the relevant 'Assessment Outcome' of the health case in IHS.

In the 'Add/Edit Health Details' pop-up box, record the 'Assessment Outcome' of the relevant the health case in IHS as the 'Health Outcome' in AMS by selecting the appropriate option in the 'Health Outcome' drop down box.



The Health Outcome selected must match the 'Assessment Outcome' within the corresponding health case in IHS for the applicant.

If the 'Assessment Outcome' is:

- 'Incomplete', select 'Terminated' from the 'Health Outcome' drop-down list. (A health case assessed as 'Incomplete' in IHS is the same as 'Terminated'). Refer to [SOP Check the Health Assessment Outcome in IHS](#) for details.
- 'Deferral', then you will not be able to select a 'Health Outcome' in AMS. (A 'Deferral' means the health assessment has been deferred until certain health conditions have been met by the client.) You can record the 'Deferral' outcome as an AMS Note against the client's application. Refer to [FAQs - Health deferrals in IHS](#).

If an assessment outcome is not available for the visa application, and you are:

- lodging the application, then you can skip this step.
- assessing the application, then you need to have a health outcome before you can proceed. You will need to wait until the health case is assessed.

Click 'Save' to save all your Health Details changes.

Note: An application can be progressed without a Health Outcome within the Health Details. The Health Outcome can be added later during processing, but must be added at Determination.

9. Complete lodgements and /or determination.

Complete the visa processing as per standard processes.

Note: Health Details must be recorded for each of the applicants that require medicals at Determination to decide the application.

See Also

[Recording Health Details in AMS](#)

[Record Health Details at Lodgements or Determination](#)

[When are Health Details added in AMS](#)

[AMS Health Details FAQs](#)

[Known issues in AMS](#)

Released under the Official Information Act 1982

When are Health Details added in AMS

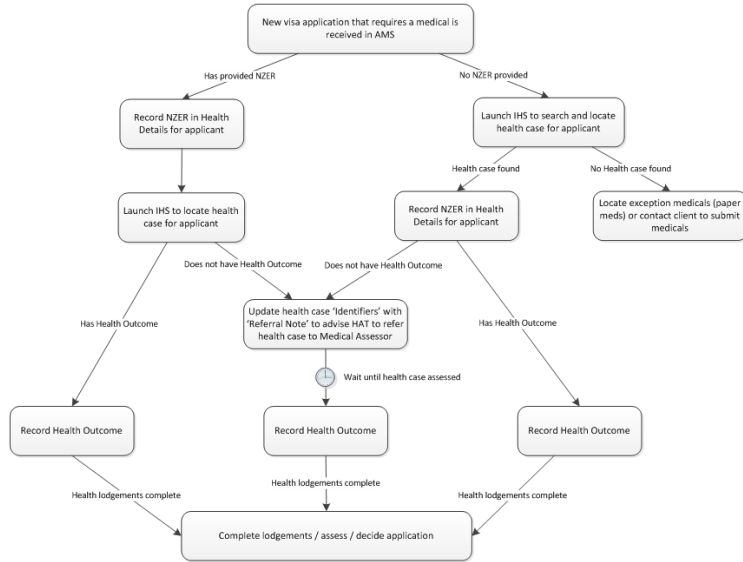
The Health Details to be recorded in AMS for an applicant's application consist of two parts:

- The NZER (the eMedical Reference Number) or the NZHR (the IHS Health Case Reference Number) where a health case does not have a NZER, and
- The Health Outcome of the health case, if it has been assessed at the time you are lodging or processing the application.

Health Details can be added at Lodgements, during visa processing post Lodgements and during Determination.

The following diagram provides an overview of when health details can be added and the interactions with the IHS and the HAT during this process.

New visa application is received, medicals are required and you need to record the Health Details in AMS:



Scenario 1: Record Health Details at Lodgements

Where a medical is required for an applicant's application, AMS will check at Lodgements if Health Details (NZER or NZHR and Health Outcome from the IHS health case) already exist and where they don't exist, AMS will present a message to enter the Health Details for the applicant or waive the health question.

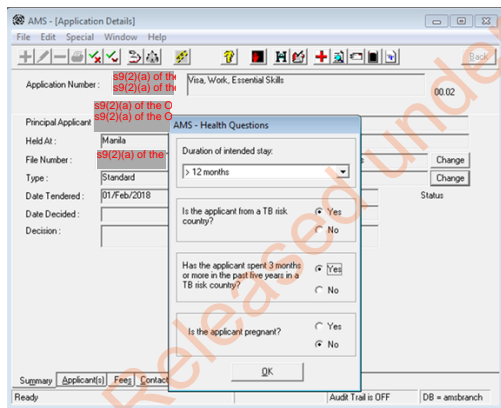
Role

All roles that process visa applications within AMS.

Steps

1. Complete lodgement questions



Complete the lodgement questions for the visa application following the standard procedures as required.

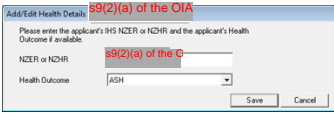



2. Check if AMS health details are required and exist

Click on the Lodgement button .

AMS will determine if the applicant needs a medical certificate for the visa application (based on the lodgement criteria) and check for Health Details.

| If there are... | Then... |
|--|--|
| No existing Health Details for the applicant's application | <p>No existing Health Details recorded against the applicant's application will look like this:</p>  <p>AMS prompts you to enter Health Details for the application where a medical is required and Health Details are not yet recorded. The 'AMS - Health Details' dialogue box will appear:</p>  |

| | |
|--|---|
| | <p>Click 'Yes' to open the 'Add/Edit Health Details' screen.</p> <p>Search IHS for the health case and enter the health details from the IHS health case in the 'Add/Edit Health Details' screen in AMS:</p>  <p>Click 'Save' to continue and go to complete Lodgements.</p> |
| <p>Health Details are already recorded in AMS for the applicant's application but lodgements are not yet completed</p> | <p>Health Details are recorded against the applicant's application will look like this:</p>  <p>Complete the lodgements process in AMS.</p> |

Go to determination

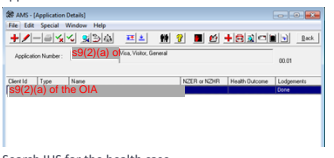
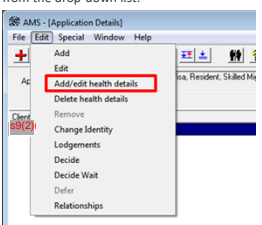
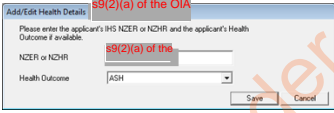
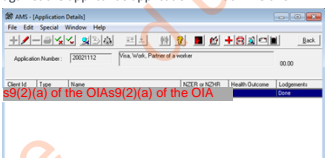
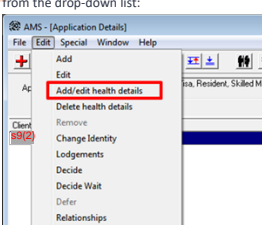
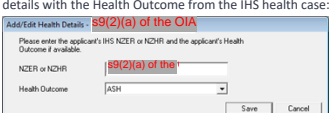
Scenario 2: Record Health Details post-lodgement

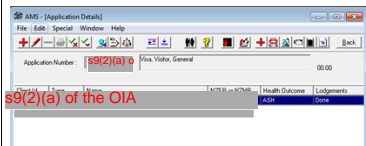
Where Health Details were not completed at Lodgements or where an application has been pre-loaded into AMS via Bulk Data Capture (BDC) or Immigration ONLINE for an applicant that requires a medical, Health Details can be recorded in AMS against the applicant's application post lodgements.

Note: Health details may already have been entered at Lodgements or may only be partially completed (NZER or NZHR only).

Steps

1. Check if AMS health details are required and exist

| If there are... | Then... |
|--|---|
| <p>No existing Health Details for the applicant</p> | <p>No existing Health Details recorded against the applicant's application will look like this:</p>  <p>Search IHS for the health case.</p> <p>From the Edit menu in AMS, select the "Add/edit health details" from the drop-down list:</p>  <p>In the 'Add/Edit Health Details' screen, enter the health details (NZER and Health Outcome) from the IHS health case:</p>  <p>Click 'Save' to continue and go to complete Determination.</p> |
| <p>Partially recorded Health Details for the applicant i.e. only NZER or NZHR with no Health Outcome</p> | <p>If Health Details are partially complete, they will be recorded against the applicant's application will look like this:</p>  <p>Search IHS for the health case to find the Health Outcome.</p> <p>From the Edit menu in AMS, select the "Add/edit health details" from the drop-down list:</p>  <p>Open the 'Add/Edit Health Details' screen and complete the health details with the Health Outcome from the IHS health case:</p>  <p>Click 'Save' to continue and complete Determination.</p> <p>Note: At Determination, an application cannot progress through the determination validations without Health Details and must have a Health Outcome recorded.</p> |

| | |
|---|---|
| <p>Completed Health Details are already recorded in AMS for the applicant's application</p> | <p>Health Details are recorded against the applicant's application look like this:</p>  <p>Check that the Health Details information is correct and complete the determination process in AMS. Complete Determination.</p> |
|---|---|

Process ends.

Scenario 3: Record Health Details at Determination

An application that requires a medical has completed Lodgements and is being assessed by an Immigration Officer.

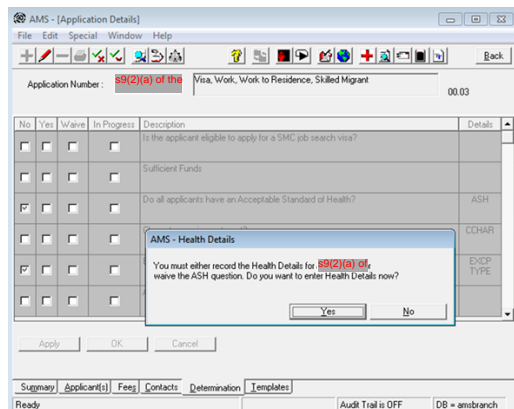
Health Details must be recorded for each of the applicants that require medicals at Determination to decide the application.

AMS will check at determination if Health Details exist and are completed. Where they do not exist or are not completed, AMS will present a message to enter the Health Details for the applicant or waive the health question.

Note: Health details may already have been entered at Lodgements or may only be partially completed (NZER or NZHR only).

Context

At Determination, when you click on the Edit function (pencil) in the tool bar, AMS will present the 'AMS - Health Details' dialogue box where:



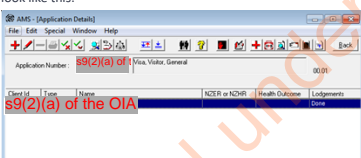
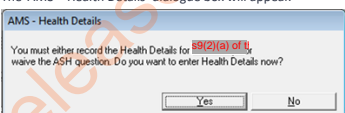
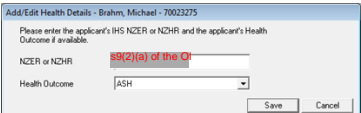
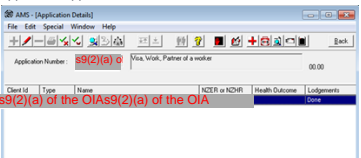
The screenshot shows the 'AMS - Health Details' dialog box overlaid on the application details screen. The dialog box contains the text: "You must either record the Health Details for s9(2)(a) of the OIA, or waive the ASH question. Do you want to enter Health Details now?" with 'Yes' and 'No' buttons.

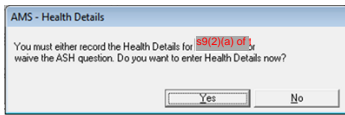
Steps

1. Check if AMS health details are required and exist

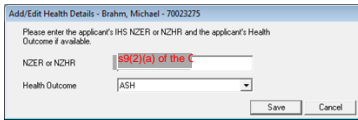
When you click on the Edit tool (pencil) in the Determination screen, AMS will check if the application requires a medical and prompt the user if Health Details are not yet recorded or are partially recorded:

Determine next step:

| If there are... | Then... |
|--|--|
| <p>No existing Health Details for the applicant</p> | <p>No existing Health Details recorded against the applicant's application will look like this:</p>  <p>AMS prompts you to enter Health Details for the application where a medical is required and Health Details are not yet recorded. The 'AMS - Health Details' dialogue box will appear.</p>  <p>Click 'Yes' to open the 'Add/Edit Health Details' screen.</p> <p>Search IHS for the health case to find the Health Outcome and record the Health Outcome in the Health Details in AMS.</p> <p>Enter the health details from the IHS health case.</p>  <p>Click 'Save' to continue and complete Determination.</p> |
| <p>Partially recorded Health Details for the applicant i.e. only NZER or NZHR with no Health Outcome</p> | <p>If Health Details are partially complete, they will be recorded against the applicant's application will look like this:</p>  <p>AMS prompts you to enter Health Details for the application where a medical is required and Health Details are not yet completed.</p> |



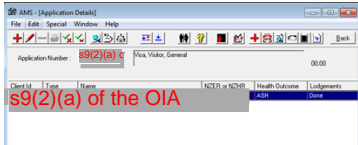
Click 'Yes' to open the 'Add/Edit Health Details' screen.
Search IHS for the health case to find the Health Outcome and record the Health Outcome in the health details in AMS.
Complete the health details from the IHS health case.



Click 'Save' to continue and complete Determination.
Note: At Determination, an application cannot progress through the determination validations without Health Details and must have a Health Outcome recorded.

Completed Health Details are already recorded in AMS for the applicant's application

Health Details are recorded against the applicant's application look like this:



Check that the information is correct and complete the determination process in AMS.
Complete Determination.

Process ends

See Also

- [Recording Health Details in AMS](#)
- [Record Health Details at Lodgements or Determination](#)
- [Record IHS medical certificates as Health Details in AMS](#)
- [AMS Health Details FAQs](#)
- [Known issues in AMS](#)

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FAQs - New Health Details

What are the Health Details for an applicant's application?

The new Health Details consist of the NZER (eMedical Health Case Reference Number) or the NZHR (the IHS Health Case Reference Number) and the Health Outcome (the medical assessment outcome) of the health case in IHS.

These details are added to the applicant's application via a new Add/Edit Health Details screen pop-up like this:

The "NZER or NZHR" field is where you enter the IHS NZER health case reference number (or NZHR health case reference number from IHS where if a NZER doesn't exist).

The Health Outcome for the health case can be selected from the drop-down list. You choose the applicable Health Outcome based on the relevant health case in IHS for your application.

Also refer to "What Health Outcome options can be added to the Health Details?" sections for further information.

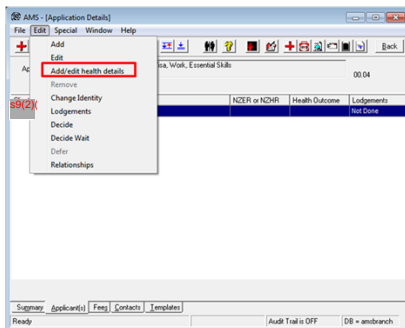
Note: An NZER must be entered with a capital N followed by nine (9) numerals. A NZHR must be entered with a capital HR followed by seven (7) numerals. You can also copy and paste the health case number directly from IHS.

How do I record an applicant's Health Details in AMS after this change?

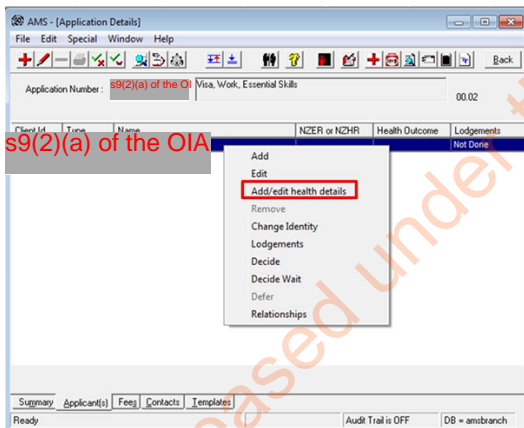
You will need to record new Health Details (NZER or NZHR and Health Outcome from an IHS health case) against an applicant's application instead of creating a Health Certificate in AMS.

To add Health Details, you can do this from the AMS - Application Details screen in the applicant(s) tab in two ways:

- From the Edit menu, select "Add/edit health details" from the drop-down list.



- Right click on the applicant's application and select "Add/edit health details" from the drop-down list.



You can edit the Health Details in the same way. Refer to "Can I change the Health Details within an applicant's application?" for further details.

There is also an option to Remove Health Details. Refer to "Can I remove Health Details from an application?" for this process.

Do I need to add Health Details to an applicant's application in AMS?

Yes, for every applicant that requires medicals for a visa application, it will need to have the new Health Details information (NZER or NZHR and Health Outcome) from the IHS health case recorded against the applicant's application in AMS.

Note: The medical criteria in AMS (as defined by the immigration instructions) that determines if an applicant requires a medical for an application remains the same as it is currently.

Can I add multiple Health Details to an applicant's application?

No, an applicant's application can only have one set of Health Details (NZER or NZHR and Health Outcome) per application.

Refer also to "If there is more than one health case in IHS for the applicant, which health case do I record as the health details in AMS?" in the section below.

Note: Previously in AMS, you could only have one Health Certificate per application. This is the same for the Health Details i.e. one set of Health Details per applicant's application. However, both a General Medical Certificate and an X-ray certificate could previously be included within the same Health Certificate in AMS. However, in IHS, sometimes the X-ray and GMC can be submitted as separate health cases and may therefore have separate NZER numbers (and also potentially with different health outcomes).

When do I need to add the new Health Details to an applicant's application?

Health Details may be added to the applicant's application during Lodgements or at Determination. The preference is to record the Health Details at Lodgements. Where a health outcome is not available at Lodgements, then it can be added later at Determination.

Can I add Health Details to a client?

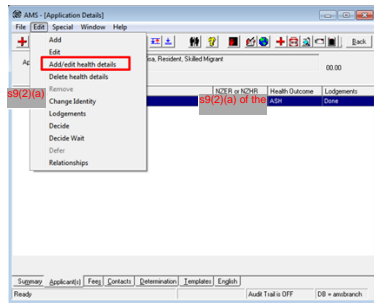
No, you cannot add, change or remove Health Details at the client level in AMS; you can only view the Health Details.

The Health Details presented at the client level are those for the clients most recently accepted application in AMS that has a NZER or NZHR. Refer to [View Health Details](#) for details.

Note: You can add Health Details at the applicant's application level.

Can I change the Health Details within an applicant's application?

Yes, Health Details added to an applicant's application at Lodgements can be edited post Lodgements or at Determination in AMS. You may edit the Health Details to add in a Health Outcome or change the NZER number if this was entered in the application incorrectly. During editing, you cannot leave a Health Outcome in the Health Details without a NZER or NZHR.



You may also edit Health Details post-Determination if required in exceptional circumstances, but only before the application is finalised. Once the application is in a "Completed" state in AMS, it cannot be edited (this is current functionality).

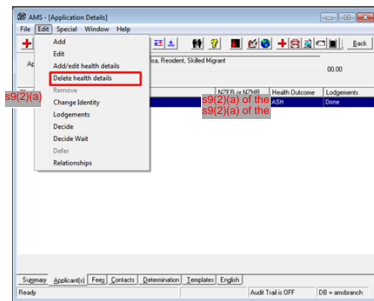
You can also remove health details from the applicant's application in exceptional circumstances, for example, where they have been added in error to the wrong application or applicant. Refer to "Can I remove the Health Details?"

Can I remove the Health Details from an application?

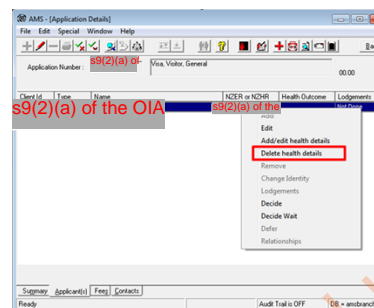
Yes, you can remove the Health Details from an applicant's application in exceptional circumstances. For example, where the Health Details have been added to the wrong application or to the wrong applicant.

To remove Health Details, you can do this from the AMS - Application Details screen in the applicant(s) tab in two ways:

- From the Edit menu, select "Delete health details" from the drop-down list:



- Right click on the applicant's application and select "Delete health details" from the drop-down list:



Note: You will be asked to enter a reason why you are removing the Health Details from the application during this process.

Who can add, edit or remove the Health Details?

Any AMS user that currently has access to process visa applications that require medicals in AMS will have access to add, change or remove Health Details from an application. This will usually be the visa processing officer at Lodgements or the Immigration Officer assessing the application at Determination.

Note: You should not add, change or remove health details from an applicant's application if this is not your role in visa processing. If you are not processing the visa application, you should not change it unless you have been authorised to do so e.g. if you are not the lodgement officer or the Immigration Officer determining the decision for the application.

Where do I find the new Health Details to add to an applicant's application?

You will be required to search in the Immigration Health System (IHS) to find the relevant health case for the applicant's application as you do currently. Refer to [SOPs Searching for a Health Case in IHS](#) and [Checking Medical Certificates in IHS](#).

The IHS quick launch tool in AMS should make it easier to find the correlating health cases in IHS. Refer to "IHS quick launch tool" section for further details.

If there is more than one health case in IHS for the applicant, which health case do I record as the health details in AMS?

As you can currently only record one health case as the health details against an application in AMS, if there are multiple health cases in IHS for the client, then you will need to locate the relevant valid health case for the applicant's new visa application.

As a general rule, the health case to record in AMS as the health details for your applicant's application in AMS would normally be the most recently assessed health case (ASH, ASH with Conditions or Not-ASH) in IHS that contains a General Medical Certificate (GMC) or Limited Medical Certificate (LMC).

Look for the most recent health case in IHS based on the NZER and/or Clinic name provided with the application. It may already be auto-assessed as ASH or manually assessed. Remember to review the assessment outcome of the health case to determine if the outcome is appropriate for the visa application type being lodged or assessed. If the most recent health case has not been assessed yet, enter the Application ID and client number via the Identifiers tab in IHS to trigger the medical assessment.

If there is an active Health Warning in AMS but the health case is auto-assessed as ASH, please clarify with the HAT.

If the applicant also needed an x-ray for their application but this has been submitted separately to the GMC/LMC health case, then the X-ray health case details can be recorded against the application just as a AMS health note. Or you could record them as health details, saving the X-ray first, then editing to save the GMC health details. The health details will then be saved automatically as health notes for the client.

Refer to [SOPs Searching for a Health Case in IHS](#) and [Checking Medical Certificates in IHS](#) and [Communications to HAT](#).

Note: Only one health case reference number (NZER or NZHR) and its correlating health outcome can be added as the Health Details for an applicant's application.

Can I change the Health Details for a "Decided" application?

Yes, you can edit the Health Details in an application after it has been decided. However, you should only change the Health Details on a Decided application in exceptional circumstances (and done so with caution) as the Health Details have already been considered in the decision making process for that application.

You cannot add in Health Details to an application after it has been finalised in AMS.

Note: As per current functionality, you cannot change an application that is in a "Completed" state in AMS.

Can I add or change Health Details for a "Completed" application?

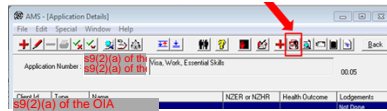
No, you cannot add or change the Health Details in an application after it has been finalised in AMS.

Note: As per current functionality, you cannot change an application that is in a "Completed" state in AMS.

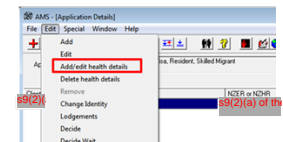
I don't see the IHS button in the AMS toolbar or the 'Add/edit health details' menu, what do I do?

If you do not have the IHS button in the AMS toolbar or the 'Add/edit health details' option in the drop down menus from the application tab, then you may not have the access privileges.

The IHS launch button is here:



The add/edit or delete health details menu in the applicant's tab is here:



Depending on the access you require for your role, you will need to be added with Full Access permissions to either or both of the two new security access privilege groups:

- LaunchIHS (to view the button to launch IHS)
- EditHealth (to add, edit or delete health details)

Contact the MBIE service desk (service.desk@mbie.govt.nz) in the first instance if you don't have the right permissions in AMS.

See Also

- [AMS Health Details FAQs](#)
- [FAQs - NZER or NZHR reference numbers](#)
- [FAQs - Health Outcome in AMS](#)
- [FAQs - View Health Details](#)
- [FAQs - Medical assessment](#)
- [FAQs - Lodgements process changes](#)
- [FAQs - Determination process changes](#)
- [FAQs - Health module changes](#)
- [FAQs - IHS quick launch tool](#)
- [FAQs - Reuse of AMS Health Certificates](#)
- [FAQs - Transition for applications](#)
- [FAQs - Other scenarios](#)

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FAQs - NZER or NZHR reference numbers

The health case in IHS has a NZER and a NZHR, which number do I record in AMS?

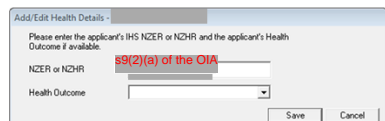
The applicant is expected to submit the eMedical Information Sheet (which shows the NZER number) from the Panel Physician along with their visa application. This is the primary health case identifier in IHS.

All health cases in IHS also have an NZHR number (this is the INZ health case reference number).

Where a health case has both a NZER and NZHR number, only record the NZER in AMS in the "NZER or NZHR" field as the Health Details in AMS, along with the Health Outcome for the health case.

You must enter a NZER into the "NZER or NZHR" field of the "Add/Edit Health Details" screen in a specific format. The NZER must be recorded with a capital N followed by nine (9) numerals.

A NZER number entered in the "Add/Edit Health Details" screen will look like this:



The screenshot shows a web form titled "Add/Edit Health Details". It contains three input fields: "NZER or NZHR" with the text "N9(2)(a) of the OIA", "Health Outcome" with a dropdown menu, and "Save" and "Cancel" buttons at the bottom.

Note: Do not try to enter both health case reference numbers in the "NZER or NZHR" field. If you do, it will fail the system validation and you will be presented with an error message.

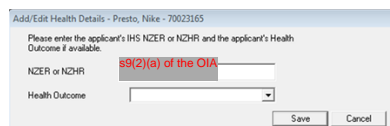
The health case in IHS doesn't have a NZER number, what should I do?

As not all health cases in IHS have a NZER number (for example, a medical that has not been submitted through the eMedical system like a paper medical). These health cases will only have the NZHR number. This is the IHS health case reference number.

If a health case in IHS does not have a NZER number, then you will only record the NZHR reference number in the "NZER or NZHR" field, along with the Health Outcome for the health case.

You must enter a NZHR into the "NZER or NZHR" field of the "Add/Edit Health Details" screen in a specific format.

A NZHR must be entered with a capital HR followed by seven (7) numerals. A NZHR number entered in the "Add/Edit Health Details" screen will look like this:



The screenshot shows a web form titled "Add/Edit Health Details - Presto, Nike - 70023165". It contains three input fields: "NZER or NZHR" with the text "HR7(2)(a) of the OIA", "Health Outcome" with a dropdown menu, and "Save" and "Cancel" buttons at the bottom.

Note: You can copy and paste the NZER or NZHR number from IHS into AMS, or type the number in manually into the "NZER or NZHR" field, whichever is your preference.

- See Also
- [AMS Health Details FAQs](#)
 - [FAQs - New Health Details](#)
 - [FAQs - Health Outcome in AMS](#)
 - [FAQs - View Health Details](#)
 - [FAQs - Medical assessment](#)
 - [FAQs - Lodgements process changes](#)
 - [FAQs - Determination process changes](#)
 - [FAQs - Health module changes](#)
 - [FAQs - IHS quick launch tool](#)
 - [FAQs - Reuse of AMS Health Certificates](#)
 - [FAQs - Transition for applications](#)
 - [FAQs - Other scenarios](#)

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FAQs - Health Outcome in AMS

How do the new changes to Immigration Health System (IHS) impact the Health Outcome in AMS?

Changes to IHS in August 2018 include a new health assessment outcome of 'Deferral'. There is also a change to the naming of 'Terminated': now relabelled as 'Incomplete'.

When you locate the relevant health case in IHS for the application you are lodging or assessing, and you find one of these new outcomes, use the following guide to decide your next steps:

| If the health case 'Assessment outcome' in IHS is... | Then... | Reference |
|--|--|---|
| Deferral | The assessment of the health case has been deferred until all conditions have been met and no outcome has been provided. You cannot record an outcome for the Health Details. You can update the applicants application with the details of the deferral by recording this information as an AMS Note. | A deferral is only applicable in the case of a residence application as defined in A4.55 of the INZ Operational Manual. Refer to FAQs - Health deferrals in IHS . |
| Incomplete | Record the Health Outcome in AMS as 'Terminated'. | 'Incomplete' means the same as a 'Terminated' health case. The assessment of the health case has not been completed and no outcome has been provided. |

How do I record a Health Outcome in AMS?

You can record a Health Outcome at the same time as you record the NZER or NZHR within the Health Details for an applicant in AMS. You can also add a Health Outcome to existing Health Details (NZER or NZHR) at a later time when the relevant health case in IHS has been assessed. Both these actions are done from the applicant's application using the "Add/Edit Health Details" pop-up from the application menu in AMS.

You will need to view the relevant health case in IHS to check if it has been assessed and find the health outcome to add to the applicant's application in AMS. Refer to [SOP Searching for a Health Case in IHS](#) for guidance on how to search.

When the health case has been assessed, you will find the health case assessment outcome in the "Case Summary" tab. Refer to [SOP Check the Health Assessment Outcome in IHS](#) for further information on what each health assessment outcome means.

Once the health assessment outcome for the application you are lodging or assessing has been identified in IHS, then select the appropriate Health Outcome option from the drop-down list in the "Add/Edit Health Details" screen in AMS to record the Health Outcome against the applicant's application.

Important Note: You will also need to update the health case in IHS with the new application number and / or client number (AMS application Identifiers) and Visa Details (Visa Category, Visa Type, Referral Type and Length of Stay) in the 'Identifiers' tab of the health case. This is to 'claim' the health case for the application you are lodging or assessing. Remember to add in a Referral Note with information about why you are updating the Visa Details and application identifiers. This is to advise 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 details on how to do this

What Health Outcome options can be added to the Health Details?

There are four Health Outcome options that can be added to the Health Details in AMS: ASH, ASH with conditions, Not ASH and Terminated.

The Health Outcomes can be selected from the drop-down list in the "Add/Edit Health Details" screen in AMS like this:

Important Note: Due to the changes to IHS in August 2018, there is a new health assessment outcome of 'Deferral' and a name change of 'Terminated' to 'Incomplete'. The 'Deferral' option has purposely not been updated in AMS to ensure that the Health Details cannot be completed until any outstanding health conditions are met. Refer to the above section 'How do the new changes to Immigration Health System (IHS) impact the Health Outcome in AMS?' for details.

When do I need to add a Health Outcome to the applicant's application?

A Health Outcome can be added to an applicant's application during Lodgements or Determination for all applicants that require medicals.

An application can pass all Lodgement validation without a Health Outcome. However, a Health Outcome is a mandatory requirement at Determination. An applicant's application must have a Health Outcome for the application to pass all system validation rules criteria at Determination.

If there is no Health Outcome recorded in AMS yet, then you will need to locate the relevant health case in IHS to find the 'Assessment Outcome' to add as the Health Outcome to the applicant's application in AMS. Refer to [SOP Searching for a Health Case in IHS](#) and [Check the Health Case Status in IHS](#) to find a health case and check its status. Refer to [SOP Check the Health Assessment Outcome in IHS](#) what each health assessment outcome means.

What is the difference between a 'Health Outcome' and an 'Assessment Outcome'?

A 'Health Outcome' and an 'Assessment Outcome' mean the same: one is what the clients currently assessed health status is called in AMS and the other is what it is referred to within IHS.

The 'Health Outcome' is recorded in AMS as part of the Health Details for an applicant's application. This is the outcome decision for the client's health status as defined by the assessment of the client's medicals in IHS.

The 'Assessment Outcome' is recorded in the health case in IHS. The latest assessment outcome is viewable in the 'Case Summary' tab and within the grey banner at the top of the health case. Previous assessment outcomes are in the 'Case Timeline' tab. Each Assessment Outcome includes the IHS Visa Category, Visa Type and Referral Type it was assessed against. Refer to [Check the Health Assessment Outcome in IHS](#) for guidance.

Can I add a Health Outcome without a NZER or NZHR?

No, a Health Outcome can only be entered in the Health Details screen where it has a NZER or NZHR number. If you try to add a Health Outcome without a NZER or NZHR, it will fail the system validation rules and present you with an error message.

Where do I find the Health Outcome in an IHS health case?

The Health Outcome to be recorded in the AMS Health Details is the same as the "Assessment Outcome" in IHS. You will need to locate the relevant health case in IHS and check if it has been assessed. Refer to [SOP Searching for a Health Case in IHS](#) and [Check the Health Case Status in IHS](#).

The process to find a health case in IHS should be very quick where the applicant already has a NZER or NZHR, using the quick launch tool to find the relevant health case, or the client details to find a list of search results.

When a health case in IHS has been assessed, you will find the latest assessment outcome in the 'Case Summary' tab of a health case:

The screenshot shows the 'Case Summary' tab of a health case in IHS. The 'Assessment Outcome' is highlighted in red and reads 'Assessed - ASH with Conditions (Temporary)'. Other details include Case Status: Assessed, Medical Completion: 26/07/2018, Manual Assessment: Yes, X-ray Supplied: Yes, and Latest Assessment Conditions: added an FR that is conditional. Attachments include 'Medical Cert - Copy - Client Declaration.pdf' and 'New Zealand'.

If the health case has been assessed previously, refer to the 'Outcome History' table in the 'Case Timeline' tab. This table will provide the details of any previous health assessment(s) in case they can be applied to the application you are lodging or assessing.

The screenshot shows the 'Outcome History' table in the 'Case Timeline' tab. The table has columns for Username, Date, Outcome, Visa Category, Visa Type, Visa Application #, and Referral Type. Two rows are shown, both with 'ASH' as the Outcome and 'General' as the Referral Type. The Visa Application # for the second row is highlighted in red and reads 's9(2)(a) of the OIA'.

Refer to the [SOP Check the Health Assessment Outcome in IHS](#) for further guidance on what each health assessment outcome means.

Do I need to check if the Health Outcome is applicable for the visa type I'm processing?

Yes, there is no change to current practice. You must always check in IHS for the relevant health case to determine if it is still valid for the application and if it has the right medical certificates etc. You must also check if the health outcome and the criteria used to decide it is applicable for the application type before you can add the Health Details to the application in AMS.

For example, check the health case details and:

- Is it auto-cleared as ASH for all visa types?
- Is it ASH only for Temporary applications?
- Is it ASH for Residence only?
- Is it ASH with conditions? If yes, is this for the current visa application type?
- Does it only apply to Limited criteria?
- Does the intended length of stay align with the visa application?

Refer to [SOP Check the Health Assessment Outcome in IHS](#) and [FAQs - 'Auto-Assessed' health cases](#) for further guidance on how to identify if the health case has been auto-assessed and what each health assessment outcome means.

Talk to your Technical Advisor for further guidance where you are unsure if a health assessment can be applied to an application.

What do I do when I have identified the 'Health Outcome'?

Once you have identified the correct health case assessment outcome for the application you are lodging or assessing, you can record the Health Outcome as the Health Details against the applicant's application in AMS.

You will still need to update the 'Identifiers' tab of the relevant health case in IHS with the new visa application number and / or client number (the AMS application identifiers).

You will now also need to enter or update the Visa Details (Visa Category, Visa Type, Referral Type and Length of Stay) of the application into the health case. Refer to [SOP Update the visa details in a health case in IHS](#) and [FAQs - Visa Details in IHS](#) on how to do this.

What should I do if the health case has not been correctly assessed for an application?

If the health assessment has been completed under different assessment criteria (for example, temporary and you are lodging or assessing a residence visa) then you may need to request that the health case is reassessed under different criteria.

You can re-open a previously assessed health case to have it reassessed under the different criteria for the new application. Refer to [SOP Re-open a health case in IHS](#) and [FAQs - Re-opening health cases in IHS](#) for details.

You must update the Visa Details (Visa Category, Visa Type and Referral Type) and the AMS identifiers in the 'Identifiers' tab of the health case in IHS when you reopen it. Remember to add in a Referral Note to request the new assessment. Refer to [SOP Update the visa details in a health case in IHS](#) and [FAQs - Visa Details in IHS](#).

Talk to your Technical Advisor before you re-open a health case.

What should I do if the health case in IHS has no 'Assessment Outcome'?

If the health case is newly received, and it has not passed the auto-clearance rules in IHS, it may not yet have been processed by HAT or assessed by a medical assessor; therefore the health case will not have a Health Outcome.

For a health case with no health assessment outcome:

- If you are processing the visa application at Lodgements, then you will only need to record the NZER number of the health case against the applicant's application Health Details in AMS. Update the 'Identifiers' tab of the health case in IHS with the new application number and / or client number as well as the visa and referral details if these are not correct. Add a "Referral Note" to advise the HAT why these have been updated e.g. 'Visa application received and accepted'. If the health case is still in an 'Open' state, you will need to email the HAT as well.
- If you are assessing the visa application at Determination, you will need a Health Outcome as well as the NZER number of the health case recorded against the applicant's application Health Details in AMS so that it will pass the system validation rules for finalisation. You will need to wait until the health assessment is completed or check in the health case for a previous health assessment. You can also check in IHS for a previous health case for your client. Update the 'Identifiers' tab of the health case in IHS with the new application number and / or client number as well as the visa and referral details if these are not correct. Add a "Referral Note" to advise the HAT why these have been updated e.g. 'Visa application being assessed. Please refer medicals for health assessment'. If the health case is still in an 'Open' state, you will need to email the HAT as well.

If the health case for the application has not yet been referred to a Medical Assessor, then update the 'Identifiers' tab of the health case in IHS with the new application number and / or client number and wait until the case has been assessed. If the health case is still in an 'Open' state, you will need to email the HAT as well. You may also need to contact HAT (HAT@mbie.govt.nz) to action a medical referral for the health case. Refer to [SOPs Communications to HAT](#) for details.

Also refer to [SOP Checking Medical Certificates in IHS](#), [SOP Check the Health Case Status in IHS](#) and [SOP Check the Health Assessment Outcome in IHS](#) for guidance.

Do I still need to update the 'Identifiers' tab in IHS with the AMS application details?

Yes, you still need to update the 'Identifiers' tab of the relevant health case in IHS with the new application number and / or client number (the AMS application identifiers) to 'claim' that health case for the application you are lodging or assessing.

You now also need to enter or update the Visa Details (Visa Category, Visa Type, Referral Type and Length of Stay) in the 'Identifiers' tab of the health case. Remember to add in a Referral Note with information about why you are updating the Visa Details and application identifiers. This is to advise 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](#) on how to do this.

Will the Health Outcome be automatically updated in the AMS application?

No, as AMS and IHS systems are not integrated, there are no automatic updates between the systems.

This means that where an NZER or NZHR has already been added to the applicant's application without a Health Outcome, the Health Outcome from the IHS medical certificate will need to be manually added to an applicant's application in AMS when it is available.

How do I find out when a Health Case has been assessed?

You will need to check in IHS periodically to see if the health case has been assessed as you do currently. Refer to [SOP Searching for a Health Case in IHS](#) and [Check the Health Case Status in IHS](#).

The process to find a health case in IHS should be very quick where the applicant already has a NZER or NZHR, using the quick launch tool to find the relevant health case, or the client details to find a list of search results.

You can use the Health Status report to monitor any changes in the status of the health case in IHS for the application as you do currently. Refer to the [SOP Managing the Health Status report for the Office](#) for further guidance on this report.

See Also

[AMS Health Details FAQs](#)

[FAQs - New Health Details](#)

[FAQs - NZER or NZHR reference numbers](#)

[FAQs - View Health Details](#)

[FAQs - Medical assessment](#)

[FAQs - Lodgements process changes](#)

[FAQs - Determination process changes](#)

[FAQs - Health module changes](#)

[FAQs - IHS quick launch tool](#)

[FAQs - Reuse of AMS Health Certificates](#)

[FAQs - Transition for applications](#)

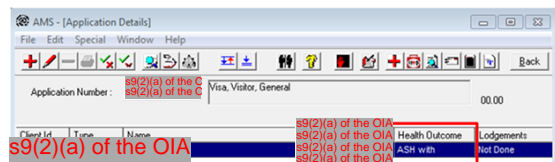
[FAQs - Other scenarios](#)

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FAQs - View Health Details

Where do I find the Health Details for an applicant's application?

When you view the Applicant(s) tab of the Application Details screen, you will see the new Health Details presented as the "NZER or NZHR" and the "Health Outcome" columns in the AMS - Application Details screen like this:



| Client Id | Type | Name | Health Outcome | Lodgements |
|---------------------|------|---------------------|----------------|------------|
| S9(2)(a) of the OIA | | S9(2)(a) of the OIA | ASH with | Not Done |

The Health Details at the application details level will enable you to navigate to IHS to view the health case for the applicant. You can do this via the IHS quick launch tool.

Note: Health Details on the applicant's application can be edited. Refer to "[How do I record an applicant's Health Details in AMS after this change?](#)" in this document.

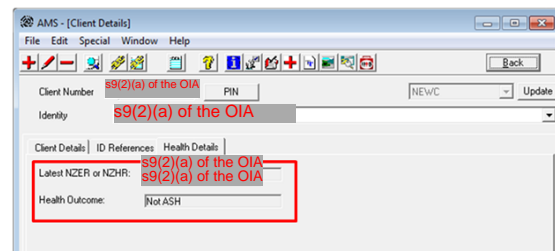
Who can view the Health Details in AMS?

If you currently have access in AMS to view applications and client details, then you will also have access to view new Health Details, from the client details or from the applicant's application.

Note: Any AMS user that has current read only access to applications will have the same access to AMS after this change.

How do I view the Health Details for a client?

There is a new Health Details tab within the AMS - Client Details screen. The Health Details tab will present the "Latest NZER or NZHR" and "Health Outcome" for the client.



| Client Number | PIN |
|---------------------|------|
| S9(2)(a) of the OIA | NEWC |

| Latest NZER or NZHR | Health Outcome |
|---------------------|----------------|
| S9(2)(a) of the OIA | Not ASH |

The Health Details presented at the client view do not show you what application they relate to. You will need to view the applicant's applications in AMS for this information and navigate to IHS to view the correlating health case for the client's application. You can activate a search in IHS via the IHS quick launch tool.

Note: Health Details on the client's level cannot be edited; only viewed. To edit Health Details, refer to "[How do I record an applicant's Health Details in AMS after this change?](#)" in this document.

Why is only one set of Health Details shown for a client in AMS?

This was a business decision to present Health Details at the client level for the client's most recently accepted application in AMS that has an NZER or NZHR recorded. This is called the "Latest NZER or NZHR". This feature lets the viewer know that the client has a previous health case in IHS that has been recorded against an application in AMS and enables a quick search of IHS via the IHS quick launch tool. Refer to the client history report for a collated view of a client's health status.

What is the "Latest NZER or NZHR"?

The "Latest NZER or NZHR" is intended to give you a view of the client's most recent health case with health outcome. This will always represent the "latest" health case reference (NZER or if no NZER, the NZHR reference number) on the client's most recently accepted application on any applications the client is an applicant on and where there is a NZER or NZHR present.

The date that the visa application was accepted in AMS (the "Accepted" state) is used to determine the most recent application.

The purpose of this feature is to enable the user to access IHS to find a client's health case using the IHS quick launch tool from the client view. Refer to the client history report for a collated view of a client's health status.

Note: The "Latest NZER or NZHR" may or may not have a Health Outcome associated with it, depending on where the application is at within the processing lifecycle.

See Also

- [AMS Health Details FAQs](#)
- [FAQs - New Health Details](#)
- [FAQs - NZER or NZHR reference numbers](#)
- [FAQs - Health Outcome in AMS](#)
- [FAQs - Medical assessment](#)
- [FAQs - Lodgements process changes](#)
- [FAQs - Determination process changes](#)
- [FAQs - Health module changes](#)
- [FAQs - IHS quick launch tool](#)
- [FAQs - Reuse of AMS Health Certificates](#)
- [FAQs - Transition for applications](#)
- [FAQs - Other scenarios](#)

FAQs - Medical assessment

How do I request a medical referral for a health case of an application in AMS?

To request a medical referral (an assessment of a health case for a visa application), you can do this directly within the Immigration Health System (IHS) by a combination of any of these actions:

- Re-opening a previously assessed health case
- Adding visa application details to an existing health case
- Releasing a health case from on hold
- Adding attachments (when reopening a health case or releasing a case from on hold).

In some scenarios, you may still need to request a medical referral for the relevant health case in IHS by emailing the HAT team (HAT@mbie.govt.nz) with the details of the health case and the application as you do currently. Please refer to [SOP Communications to HAT](#).

Before doing any actions on a health case in IHS, the first step is determining whether a medical referral is required or if a previous assessment can apply to the new application. Refer to [SOP Check the Health Case Status in IHS](#), [SOP Checking Medical Certificates in IHS](#), and [SOP Check the Health Assessment Outcome in IHS](#) for guidance. See also [FAQs - 'Auto-Assessed' health cases](#).

If a medical referral is required, use this guide - '[Cheatsheet - IO actions in IHS for communications to HAT](#)' - to help you determine what action(s) you need to do in the IHS to initiate an assessment.

When making a medical referral request for an application, either when you undertake the actions directly within the health case in IHS or via emailing a request to the HAT, you must provide the following visa and referral details information for the new assessment:

- AMS Client ID
- Type of Referral (Limited or General)
- Referral Note*.

You must also add the new application to the Application Details tab in IHS which includes:

- AMS Visa application ID
- Date
- Visa category
- Length of stay, and
- intended work activity.

If you are emailing the HAT, you must also provide the NZER (or NZHR) reference with your email request.

*** Important Note:** You must add in a Referral Note with the reason why you are updating the health case when you re-open a health case, add attachments, release it from hold and update the visa details directly in IHS. The details you add in the 'Referral Note' field will inform the HAT or MA what needs to happen next. This is instead of emailing the information to the HAT. Some examples of 'Referral Notes' are in the '[Cheatsheet - IO actions in IHS for communications to HAT](#)'.

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. Refer to [SOP Communications to HAT](#) for details on how to do this.

Important Note: Even with the new IHS features, actions on the health case do not happen immediately when you update the visa details or add a new application. HAT are not informed when you reopen a health case or request a medical referral and /or update the visa details, add a new application, add attachments or take a case off hold for visa acceptance. Please add in a Referral Note.

See Also

- [AMS Health Details FAQs](#)
- [FAQs - New Health Details](#)
- [FAQs - NZER or NZHR reference numbers](#)
- [FAQs - Health Outcome in AMS](#)
- [FAQs - View Health Details](#)
- [FAQs - Lodgements process changes](#)
- [FAQs - Determination process changes](#)
- [FAQs - Health module changes](#)
- [FAQs - IHS quick launch tool](#)
- [FAQs - Reuse of AMS Health Certificates](#)
- [FAQs - Transition for applications](#)
- [FAQs - Other scenarios](#)

FAQs - Lodgements process changes

What are the changes to the Lodgement processes in AMS?

With the changes to AMS implemented in March 2018, instead of creating a Health Certificate in AMS during Lodgements, you will now record Health Details of the correlating health case in IHS within an applicant's application.

The Health Details consist of the NZER (the eMedical Reference Number) or the NZHR (the IHS Health Case Reference Number) if a NZER doesn't exist and the Health Outcome of the IHS health case if it has been assessed at the time you are lodging the application.

All other business processes and steps during Lodgements in AMS remain the same as they are currently. For example, you will still search and locate a relevant health case in IHS, check that it is appropriate for the new application, has the right medicals etc. Refer to the [IHS and Health](#) sections in the Global Process Manual for details.

You must also update the 'Identifiers' tab of the health case in IHS with the new application number, client number and the Visa Details for the new application you are lodging. Refer to [SOP Update the visa details in a health case in IHS](#) and [FAQs - Visa Details in IHS](#).

Note: At Lodgements, the application can be progressed without a Health Outcome within the Health Details. The Health Outcome can be added post-Lodgements or at Determination.

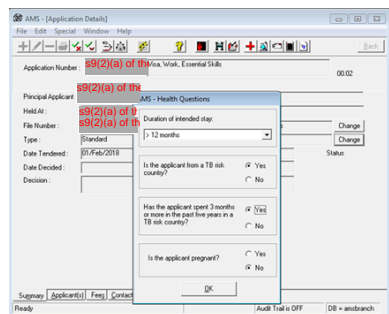
How do I know if I need to add the Health Details at Lodgements?

Where a medical is required for the application you are lodging, you will be prompted with a new message to enter Health Details for the applicant or waive the health question (as per current process) like this:



Do I still record the AMS - Health Questions at Lodgements?

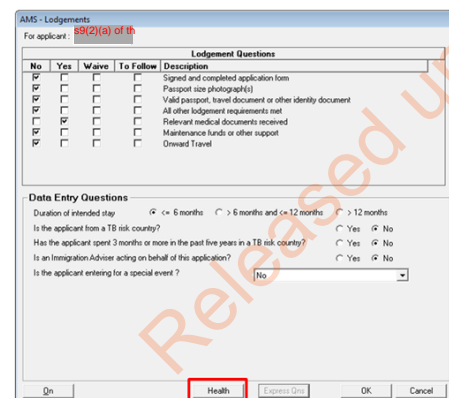
Yes, this process and functionality has not changed. You will still need to answer all the health questions at Lodgements as you do currently.




The system will still check if the applicant needs a medical according to the system validation rules and advise the user where a medical is required as it does currently.

How do I record the Health Details at Lodgements?

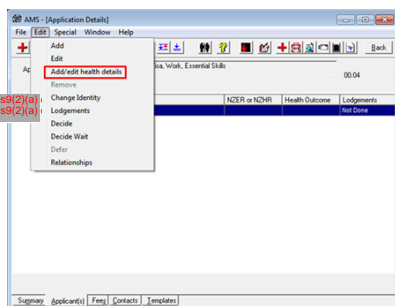
In the AMS - Lodgements screen, you can click on the Health button to present the "Add/Edit Health Details" pop-up box.

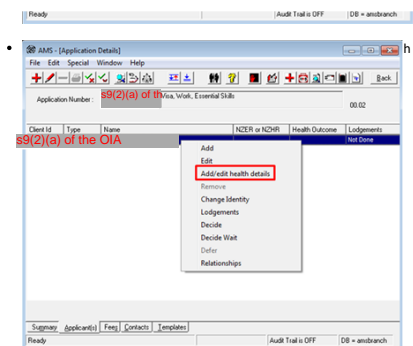


Note: The Health button will no longer launch the Health Module. To view existing health certificates in the Health Module, you will need to click the Health button  in the AMS toolbar.

You can add Health Details from the AMS - Application Details screen in the applicant(s) tab in two ways:

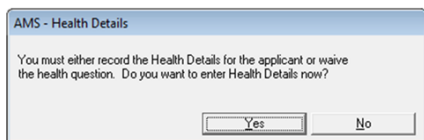
- From the Edit menu, select "Add/edit health details" from the drop-down list.





h details" from the drop-down list:

Or you can select Yes at the 'AMS - Health Details' message prompts presented during Lodgements like this:



What if the health case isn't assessed yet, do I need a Health Outcome at Lodgements?

No, if you are processing a visa application at Lodgements, you will not need to wait until the medical assessment is completed. You can add the NZER and complete the Lodgements process. The Health Outcome can be added later post-Lodgements or at Determination.

If the health case for the application has not yet been referred to a Medical Assessor, you can contact HAT (HAT@mbie.govt.nz) to action a medical referral as you do currently. Refer to "How do I request a medical referral for a health case for the application in AMS?" in this document for details.

Also refer to [SOPs Checking Medical Certificates in IHS](#) and [Check the Health Assessment Outcome in IHS](#) for further guidance.

Can I still waive the Health Question at Lodgements?

Yes, you will still be able to waive the health question at Lodgements, as defined by INZ Policy rules. You will be required to enter in a reason as you do currently.

You will need to waive the health question if you are reusing an existing AMS Health Certificate that is still valid or have a paper or MEDSonline medical that is not in IHS. Refer to the "Reuse of AMS certificates" and "What if a client has a paper or MEDSOnline medical for their application?" for further details.

Note: The current AMS functionality for waiving at Lodgements is not changing. Any INZ policy for waiving medicals still applies to this action.

See Also

- [AMS Health Details FAQs](#)
- [FAQs - New Health Details](#)
- [FAQs - NZER or NZHR reference numbers](#)
- [FAQs - Health Outcome in AMS](#)
- [FAQs - View Health Details](#)
- [FAQs - Medical assessment](#)
- [FAQs - Determination process changes](#)
- [FAQs - Health module changes](#)
- [FAQs - IHS quick launch tool](#)
- [FAQs - Reuse of AMS Health Certificates](#)
- [FAQs - Transition for applications](#)
- [FAQs - Other scenarios](#)

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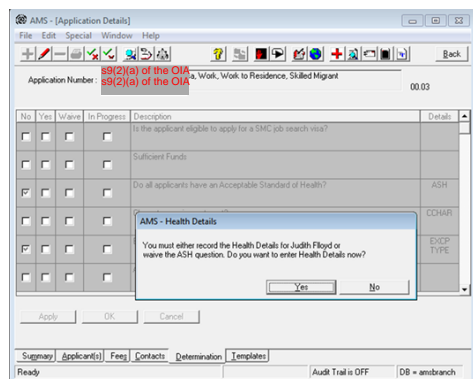
FAQs - Determination process changes

What are the changes to the Determination processes in AMS?

Instead of creating a Health Certificate in AMS, you will now record Health Details of the correlating health case in IHS within an applicant's application that requires a medical. If this step has not been completed at Lodgements, then you will need to add or complete the Health Details during Determination.

The Health Details will record the NZER (the eMedical Reference Number) or the NZHR (the IHS Health Case Reference Number) if a NZER doesn't exist and the Health Outcome of the IHS health case if it has been assessed at the time you are assessing the application.

The Health Details for the applicant must have a Health Outcome recorded before you can finalise the application.



Note that if the health case in IHS has not been assessed at the time of Determination, you will need to contact the HAT (HAT@mbie.govt.nz), and wait for the health case to be referred to a Medical Assessor. Refer to the [FAQs - Medical assessment](#) for "How do I request a medical referral for a health case of an application in AMS?" for guidance.

All other business processes and steps during Determination in AMS remain the same as they are currently.

Note: The Health Outcome is a mandatory requirement at Determination in order to pass the system validation rules, as per current business rules.

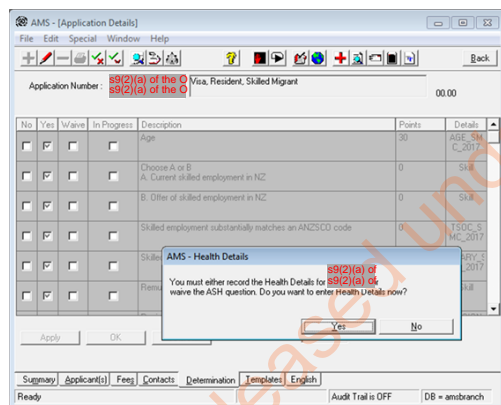
Do I need to add health details before the application can be decided?

Yes, every applicant that requires medicals for a visa application will need to have Health Details added before it can be decided. The health details are required so that the applicant's application can pass the system validation rules at Determination and the application can be finalised.

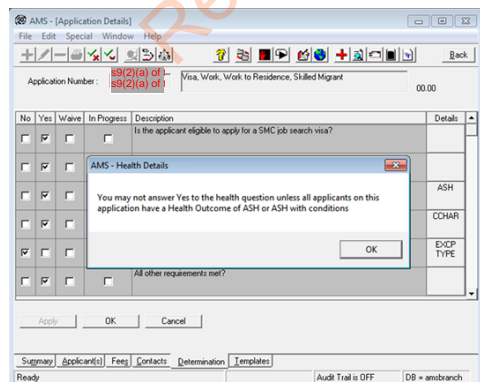
Note: Health Details at Determination must consist of either a NZER or NZHR and a Health Outcome.

How do I record the Health Details at Determination?

Where Health Details have not yet been added to an application for an applicant that requires medicals, you will be prompted to add them by the system messages at Determination like this:



Health Details question validation messages will look like this:



What do I need to do if the application with medicals is to be declined or withdrawn?

If a visa application that requires medicals is to be declined or withdrawn, and the IHS health case for that application has not yet been assessed (i.e. it has no 'assessment outcome'), then you will need to advise HAT as soon as possible so that the health case can be removed from the medical assessment queue (for referral to a Medical Assessor).

For these cases, HAT will stop the medical processing and terminate the case (i.e. the health case will have an assessment outcome of 'Incomplete'). You can then record the health outcome in the AMS health details for the application as 'Terminated' so that you can complete the processing for the visa.

Contact the HAT via email (HAT@mbie.govt.nz). When making the request for a health case to be terminated (i.e. no assessment required), you must provide the following information:

- NZHR or NZER number
- AMS Application Number
- Client's Name
- Visa Category/Type
- Brief reason for the request
- "TERMINATE HEALTH CASE for NZER: N00000000" in subject line of the email.

You will still need to update the 'Identifiers' tab in the health case in IHS with the application and client numbers. You may also need to update the Visa Details of the health case. Refer to [SOP Update the visa details in a health case in IHS](#) and [FAQs - Visa Details in IHS](#).

You will be able to record the Health Outcome as Terminated in AMS once the health case has been made 'Assessed - Incomplete'.

Note: If the health case has already been assessed (ASH, Not-ASH or ASH with conditions or Deferral) and the visa application is to be declined or withdrawn, there is no change to the health outcome for the health case in IHS i.e. the decision stands (the case will not be terminated). For this scenario, you will record the health outcome from the health case as it was assessed. Please Note: If a health case is terminated it may not be valid to be re-used for future applications. See A4.25.c and A4.20.d. Refer to [SOP Advise HAT when a visa application is withdrawn or declined](#).

The health case isn't assessed yet, do I need a Health Outcome at Determination?

Yes, you will need to have the Health Outcome before you can decide the application so that the application can pass all the system validation at the Determination based on the business rules. Otherwise, you will have to waive the health question.

If the health case is being assessed (in a state of "Medical Opinion") at Determination, you will need to wait until the assessment is completed as you do currently.

If the health case for the application has not yet been referred to a Medical Assessor, you can contact HAT (HAT@mbie.govt.nz) to action a medical referral as you do currently. Refer to "[How do I request a medical referral for a health case for the application in AMS?](#)" in this document for details.

Also refer to [SOPs Checking Medical Certificates in IHS](#) and [Check the Health Assessment Outcome in IHS](#) for further guidance.

Can I still waive the Health Question at Determination?

Yes, you will still be able to waive the health question at Determination. You will be required to enter in a reason as you do currently.

You will need to waive the health question if you are reusing an existing AMS Health Certificate that is still valid or have a paper or MEDSonline medical that is not in IHS. Refer to the "[Reuse of AMS certificates](#)" and "[What if a client has a paper or Medsonline medical for their application?](#)" in this document for further details.

Note: The current AMS functionality for waiving is not changing. The INZ policy for waiving medicals still applies.

Why does the health question now default to "No" at Determination?

For some application types (e.g. some types of student visa) the ASH health question at determination previously defaulted to "In Progress" when a medical certificate was required for an applicant's application but the health certificate was not yet added and "In Progress" when a medical certificate was partially added but there was no health decision yet.

The ASH health question at Determination is now set to "No" when a medical is required for the applicant's application but no health details have been added to the application and to "In Progress" when health details have been partially added to the applicant's application (has no health outcome yet). This is so you can easily distinguish between the two different actions required to complete the processing of an application.

The ASH health question will continue to default to "Yes" when the applicant's application either does not require medicals or does require medicals and the health details have been added and are complete (i.e. have both the NZER or NZHR and a health outcome).

Note: The business rules that define whether an applicant requires a medical for the applicant type have not changed. The INZ policy for when medicals are required still applies.

See Also

- [AMS Health Details FAQs](#)
- [FAQs - New Health Details](#)
- [FAQs - NZER or NZHR reference numbers](#)
- [FAQs - Health Outcome in AMS](#)
- [FAQs - View Health Details](#)
- [FAQs - Medical assessment](#)
- [FAQs - Lodgements process changes](#)
- [FAQs - Health module changes](#)
- [FAQs - IHS quick launch tool](#)
- [FAQs - Reuse of AMS Health Certificates](#)
- [FAQs - Transition for applications](#)
- [FAQs - Other scenarios](#)

FAQs - Health module changes

Can I create a new Health Certificate in AMS after this change?

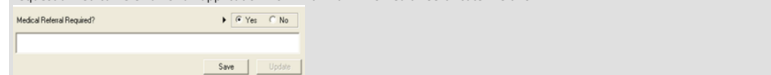
No, you will not be able to create a new Health Certificate, or edit or link to an existing one in the Health Module in AMS after this change. The Health Module in AMS will become read-only.

Can I refer a Health Certificate in AMS after this change?

No, you will not be able to refer an AMS Health Certificate to a Medical Assessor in AMS after this change. This functionality has been disabled.

You can request a medical referral via emailing the HAT team (HAT@mbie.govt.nz) with the details of the application as you do currently. Refer to ["How do I request a medical referral for an application in AMS?"](#) in this document for further details.

Note: After this change, all AMS Health Module functionality relating to referrals will be disabled and you will no longer be able to request a medical referral for an application from within an AMS Health Certificate like this:



A screenshot of a web form titled "Medical Referral Request?". It features two radio buttons labeled "Yes" and "No". Below the buttons are "Save" and "Cancel" buttons.


Can I link an application to an existing Health Certificate in AMS after this change?

No, you will not be able to link an application to an existing Health Certificate in AMS after this change. The Health Module in AMS will become read-only. You will still be able to view any historical Health Certificates in AMS.

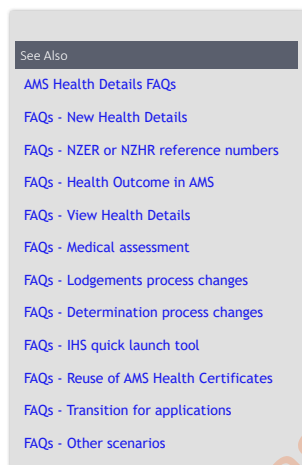
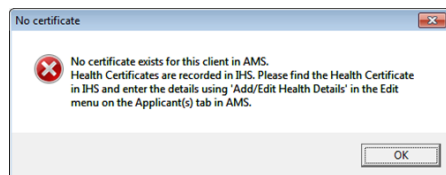
If you need to reuse an existing Health Certificate as it is still valid (is within 36 months timeframe, outcome is ASH and is not a duplicate of IHS information), then in exceptional circumstances you may use an existing Health Certificate instead of the health details for an applicant's application. These will likely be paper medicals or non-IHS medicals received external from IHS.

Refer to the SOP Record non-IHS health certificates in AMS.

How do I view an existing Health Certificate in AMS after this change?

You will still be able to view any historical Health Certificates in AMS by clicking on the Health  button in the AMS toolbar.

If there are no existing Health Certificates for the applicant when you click the button, then you will get this message:



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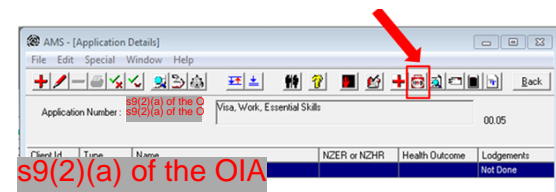
FAQs - IHS quick launch tool

How can I find a health case for an AMS application in IHS?

You can use the new IHS quick launch tool function in the AMS toolbar to start the search in IHS as a convenient tool to save time finding a matching health case.

It uses the NZER or NZHR number (if there is one for your client or application) and / or the client's details (AMS Client ID, full name, DOB, and travel/identity document details) to IHS to find a matching health case.

In the AMS - Application Details screen the IHS quick launch tool is here:



In the AMS - Client Details screen the IHS quick launch tool is here:



The IHS quick launch tool function will take you directly to IHS, based on the details in your application or the client, and present either the matching health case (where the application already has a NZER or NZHR recorded or there is a direct match to the client) or a list of results for matches to your applicant where multiple health cases are found for your client. From this list, you will be able to find the relevant health case for your applicant.

Is the NZER or NZHR required before using the IHS quick launch tool to find a health case?

No, you do not need to have a NZER or NZHR recorded in the application or against the client before you use the IHS quick launch tool to find a health case in IHS.

When you use the IHS quick launch to search for a health case in IHS, this action will send through the clients details (AMS Client ID, full name, DOB, and travel/identity document details) from AMS with the NZER or NZHR (if these have been added to the application) and perform a match to these details in IHS.

If you do not have a NZER or NZHR added to the application yet for a client (for example, at Lodgements when you are first searching for the relevant health case to record the health details), IHS will try matching against all the other client details sent from AMS.

Where a match is found, the health case will be presented for the client. Where a match is not found, you will be presented with an error message saying no matches are found. Where there are multiple matches, IHS will present the search results with hyperlinks to the relevant health cases.

Note: When you are presented with the IHS screens, you will have the ability to navigate within IHS and use the IHS functionality as currently permitted by your user access permissions. Which screen opens the health case in IHS will depend on your IHS user access permissions.

My client has multiple identities, what should I do to locate the applicable health case in IHS?

AMS will not send multiple client identities to IHS.

You should select the correct identity for your client in AMS before you initiate the search in IHS via the quick launch tool. When you click the IHS quick launch tool, AMS will send the client details for the identity selected in AMS (as presented on the client details screen in AMS).

If you find that there is no match in IHS for the client (for example if the clients name is spelt incorrectly), you can search in IHS to find the matching health case using the required search criteria as you do now.

I cannot find a matching health case, can I still search in IHS?

Where no matching health case is found as a result of clicking the IHS quick launch tool, you will be able to manually search in IHS in the search screen presented as you do now.

Note: IHS system functionality in IHS is not changing from how it currently works. How you search and find medical information in IHS will be the same as you do now. Refer to [SOPs Checking Medical Certificates in IHS](#) and [Check the Health Assessment Outcome in IHS](#) for guidance.

See Also

- [AMS Health Details FAQs](#)
- [FAQs - New Health Details](#)
- [FAQs - NZER or NZHR reference numbers](#)
- [FAQs - Health Outcome in AMS](#)
- [FAQs - View Health Details](#)
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- [FAQs - Reuse of AMS Health Certificates](#)
- [FAQs - Transition for applications](#)
- [FAQs - Other scenarios](#)

FAQs - Reuse of AMS Health Certificates

Can a client's existing AMS Health Certificate be reused for their new application?

Yes, in exceptional or special circumstances an existing AMS Health Certificate can be reused, but it must meet the valid certificate criteria.

After 30 June 2018, most of the existing paper-based and Medsonline Health Certificates in AMS can no longer be reused as they will have expired (based on the validity of medicals being reusable for 36 months from the Immigration Health System (IHS) on go-live in June 2015.)

A workaround process is in place from 25 March 2018 (go-live of SC1) to enable the reuse of existing medicals in AMS for an applicant's application where they are still valid. Any exceptions to the new Health Details process will also be handled by this workaround process e.g. if after the certificate has expired the applicant has successfully appealed a negative visa assessment and can reuse their existing medicals in AMS, or where new paper medicals are provided that are not in IHS.

Before you make the decision to reuse an existing certificate, you need to determine if it meets the criteria for reuse and there are no questions about its validity.

Refer to the SOP Record non-IHS health certificates in AMS for further information.

Note: This is a limited use, exception process for use after the Health Module is disabled (25 March 2018) to enable the reuse of valid AMS Health Certificates that have not yet expired.

This process should not be undertaken if an existing medical and/or chest x-ray certificate in AMS is an exception to immigration instructions or there are questions about its validity.

This process does not replace the recording of the IHS health details (NZER or NZHR and Health Outcome) where new medical information exists within IHS for the applicant.

How do I know if a client's existing AMS health certificate is still valid?

Before you make the decision to reuse an existing certificate, you need to determine if it meets the criteria for reuse and there are no questions about its validity.

An AMS Health Certificate that is valid for reuse must meet the following criteria:

- is the applicant's most recent health certificate in AMS and has an ASH outcome
- it is the correct certificate type (X-ray or Full Medical as per existing AMS functionality) for the visa application as per immigration instructions
- it is less than 36 months old from the date of issue where the date of issue is prior to 26 March 2018¹
- it is a paper-based or Medsonline medical certificate from a non-eMedical Panel Physician or non-eMedical enabled country received after 30 June 2015² but before 26 March 2018³
- it is not a duplication of health information in the Immigration Health System (IHS) i.e. the AMS Health Certificate is a unique, separate entity for a medical certificate (for example, it is a paper-based or Medsonline medical) that is not recorded in the IHS system.

Note: Do not use an AMS Health Certificate if an existing medical and/or chest x-ray certificate is an exception to immigration instructions or there are any questions about its validity or it is in the Immigration Health System.

How do I use a client's existing AMS health certificate that is valid for the application?

Instead of recording the new Health Details (NZER or NZHR and Health Outcome) you will need to waive the health questions at Lodgements and Determination, recording in the Notes pop-up the reason why you are waiving.

Suggested wording for the note in AMS is:

"Lodgements Health question has been "Waived" as per the agreed "IHS Phase 2" business workaround in place. Decision to reuse "AMS Health Certificate" <number> with health decision of ASH as valid and meets the criteria for reuse for this application. Client has no applicable medicals in IHS.

¹ Go-live of SC1 AMS changes when Health Module was disabled and Health Certificates can no longer be created.

² 30 June 2015 - This is the agreed date with the Visa Services and the Health Assessment Team (HAT) for the transition from AMS medicals to IHS (i.e. after which electronic medicals were mandatory for all eMed enabled countries

After 30 June 2018, any existing Health Certificates in AMS can no longer be reused if they have expired (based on the validity of medicals being reusable for 36 months from the Immigration Health System (IHS) on go-live in 30 June 2015.) However, INZ have continued to accept paper-based medical certificates from Panel Physicians who do not have access to eMedical (e.g. in the Pacific) and from non-eMedical Panel Physicians in countries where there are no panel physicians (e.g. Luxembourg, Andorra etc.) after 30 June 2015.

³ When the Health Module was disabled and Health Certificates can no longer be created.

Refer to the SOP Record non-IHS health certificates in AMS for further information.

See Also

- [AMS Health Details FAQs](#)
- [FAQs - New Health Details](#)
- [FAQs - NZER or NZHR reference numbers](#)
- [FAQs - Health Outcome in AMS](#)
- [FAQs - View Health Details](#)
- [FAQs - Medical assessment](#)
- [FAQs - Lodgements process changes](#)
- [FAQs - Determination process changes](#)
- [FAQs - Health module changes](#)
- [FAQs - IHS quick launch tool](#)
- [FAQs - Transition for applications](#)
- [FAQs - Other scenarios](#)

FAQs - Transition for applications

What will happen to any in-flight applications in AMS after the change?

This change is implemented as a 'hard cut-over', meaning that changes will be applied to all in-flight applications that are not in a 'Completed' state in AMS at the time of go-live (25 March 2018).

All in-flight applications that require medicals and are in 'Tendered' or 'Accepted' states in AMS at the time of implementation will need new Health Details added regardless of whether they already have an existing Health Certificate or not within the application before they can be processed through the Determination validation business rules.

Any in-flight application that is in a 'Decided' state can be finalised (labels issued etc.) without the need to add new Health Details as per the current processes as all business validations have already occurred. EXCEPTION: if the application is edited in any way at Determination, new Health Details will need to be added to that application or the ASH question waived. For example: where the decision is changed. Refer to Important Note below.

For example, after implementation, if the applicant's application that requires a medical has not had a decision made at Determination, then the new Health Details changes will be applied to the application. You will need record the new Health Details, even if the application already has an AMS Health Certificate, or waive the ASH question. You will see the new functionality display when you launch Lodgements or Determination for these applications.

Therefore, there may be in some instances an overlap of health information where an applicant's application has both types of health information: an existing AMS health certificate and the new health details. In these scenarios, only the new health details data will be used for the system validation during Lodgements and Determination in AMS.

Where an AMS Health Certificate is already added to an in-flight application, then you may waive the ASH question instead of adding new Health Details as an exception for these applications during transition from the new Health Details.

All applications in a "Completed" state at implementation will not be impacted.

IMPORTANT NOTE: If an in-flight application is in a 'Decided' state at implementation, and Determination it is edited in any way (i.e. the user clicks on the Edit tool in the Determination screen and / or the decision for an application is changed), the application may roll back to an 'Accepted' state and the ASH question reset to 'In Progress'. New Health Details will need to be added to the application even if it already has an AMS Health Certificate or the ASH question waived to enable the application to pass the new Health Details validation rules at Determination.

END

See Also

- [AMS Health Details FAQs](#)
- [FAQs - New Health Details](#)
- [FAQs - NZER or NZHR reference numbers](#)
- [FAQs - Health Outcome in AMS](#)
- [FAQs - View Health Details](#)
- [FAQs - Medical assessment](#)
- [FAQs - Lodgements process changes](#)
- [FAQs - Determination process changes](#)
- [FAQs - Health module changes](#)
- [FAQs - IHS quick launch tool](#)
- [FAQs - Reuse of AMS Health Certificates](#)
- [FAQs - Other scenarios](#)

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FAQs - Other scenarios

Will IHS automatically link a health case to an application in AMS?

No, the IHS and AMS systems are not integrated, so there is no automatic linking of applications with medical health cases or vice versa between the systems. You will need to manually record the details of the application and relevant health case into both systems.

You search for a health case in IHS as you do currently (sing the IHS quick launch tool) and then manually record the health case reference number (NZER or NZHR) and Health Outcome from IHS as the new Health Details within the applicant's application in AMS.

Important Note: Remember to always 'claim' the health case for the new application you are lodging or assessing, even if you don't re-open it, by updating the visa details (AMS Client Id, Visa Application #, Visa Category, Visa Type, Length of Stay and Referral Type) in the 'Identifiers' tab with the details of the new application. Add details in the 'Referral Note' field for the reason why you are updating the health case. For example, 'Visa application received. Please assess health case.' Refer to [SOP Update the visa details in a health case in IHS](#).

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

The health case in IHS is not assessed yet, what should I do?

If the health case has not been assessed (is in a state other than "Assessed" e.g. Open, Manual Assessment, Medical Opinion, Hold or Awaiting Further Requirements) then what you need to do will depend on where you are in the application process and the priority of the application. The business processes that you follow currently for when a health case is not yet assessed will still apply (these processes have not changed). Refer to [SOP Check the Health Case Status in IHS](#) for what each status means and what you should do next.

You can contact HAT (via email HAT@mbie.govt.nz) to request a medical assessment if you need to have the health case assessed as a priority i.e. Urgent. Refer to [Communications to HAT](#) for details.

At Lodgements, if the health case is being assessed (in a state of "Medical Opinion") or has not been assessed yet, then you can add the NZER and complete the Lodgements process. The health outcome can be added later at Determination.

If you are at the Determination, you will need to wait until the assessment is completed as you do currently as you need an outcome before you can decide the application. Otherwise, you will have to waive the health question.

Note: At Lodgements, an application can be processed through to assessment without a Health Outcome. The Health Outcome is a mandatory requirement at Determination so that the application that requires medicals can pass the system validation rules, as per current business rules.

My application already has an AMS Health Certificate; do I need to add the new Health Details?

Yes, you will need to add in the new Health Details to any application in a "Tendered" or "Accepted" state in AMS, even if there is an existing Health Certificate within the application. This is so the application can pass the system validation rules at Determination, as per current business rules.

If the application is in a "Decided" state, it will not require to have Health Details at the time of implementation (March 2018). However, if the application is "rolled back" (e.g. after a pending decision is reassessed) after March 2018, then the new Health Details changes will need to be applied.

You will see the new Health Details functionality display when you launch Lodgements or Determination for these applications.

Note: This "duplication" of health information will only apply to applications post-implementation (after 24 March 2018) for a short period of time after the transition to the new Health Details functionality until all in-flight applications have been processed.

Can I still waive the Health Question for applications in AMS after the change?

Yes, users processing visa applications that require medicals through Lodgements and Determination will still be able to waive the health questions to bypass the system validation rules in exceptional circumstances as they do currently. A reason will still be required when you waive the health question at Lodgements and / or Determination.

The current AMS functionality and INZ policy for waiving medicals is not changed.

What happens if health information is missing from the application?

Any processes you follow now for how you respond to customer queries for medicals will be the same in the future. There are no changes to the processes you do currently.

If health information is missing from the application, then any process you follow now is what you will continue to do in the future.

The only difference is that IHS will now be the primary source for medical information with no duplication of medical information in Health Certificates as they can no longer be created in AMS.

What if a client did a medical but they did not declare it on their application form?

The eMedical health case reference (NZER) is provided by the Panel Physician to the visa applicant when they undergo medical examination. The applicant is expected to submit the eMedical Information Sheet (with the NZER number) from the Panel Physician along with their visa application.

There are no changes to the business processes you do currently. What you do now for any applications where the client has not declared they had a medical will still apply.

AMS will continue to trigger message prompts to the user when an applicant needs a medical for an application according to the health requirements (this current functionality in AMS and the requirements for medicals is not changing).

However, if the applicant does not provide any medical certificate details at the time the application is being lodged, but the system rules determine that it requires a medical, then you will need to search IHS for a relevant health case for the applicant to add to the application, as you do currently. You can use the IHS quick launch tool and the Client History Report to find the health case for the client.

If the health case is located in IHS, record the new health details (NZER/NZHR and Health Outcome) in AMS for the applicant.

Note: Where no medical exists, then Return Failed Lodgement (RFL) as per current business practices.

What if a client has an existing paper or Medsonline medical for their application?

For the small number of existing paper-based or Medsonline medicals that can be reused for an application before they expire that are not in IHS (remember to check IHS first), the details of these medicals will now need to be recorded in the application as an AMS note instead of as Health Details as they will not have an NZER or NZHR number.

The health question will also need to be waived at Lodgements and Determination so that the application can pass the system validation rules in AMS after this change.

This is the agreed workaround solution for reuse of existing AMS Health Certificate and any non-eMed medicals (e.g. paper medicals and Medsonline) that have not been added to the IHS system (i.e. they do have a NZER or NZHR number). Refer to the SOP Record non-IHS health certificates in AMS for further information.

Note that you may still need to send the paper medical certificate(s) to the HAT to be assessed by a Medical Assessor when:

- it was previously assessed as 'ASH with conditions'
- it was previously assessed under different criteria for the previous application and now requires a reassessment;
- there is an existing valid paper medical and an applicant has completed a new medical in IHS.

Can I still switch an identity for an applicant that has Health Details?

Yes, you can still switch an identity for a client as you do now.

If the applicant has health details added to their application, these will transfer from the original identity to the switched identity; i.e. you won't need to link them like you used to for an AMS Health Certificate.

However, where you switch the identity for an application, the Data Entry questions are reset to the default. This is due to current AMS functionality where the Data Entry questions are responses saved on the identity level, as opposed to the client level.

Therefore, where your application requires or already has health details, you will need to manually amend the Data Entry questions in the Lodgements screen in order for health to be triggered correctly at Determination.

See Also

- [AMS Health Details FAQs](#)
- [FAQs - New Health Details](#)
- [FAQs - NZER or NZHR reference numbers](#)
- [FAQs - Health Outcome in AMS](#)
- [FAQs - View Health Details](#)
- [FAQs - Medical assessment](#)
- [FAQs - Lodgements process changes](#)
- [FAQs - Determination process changes](#)
- [FAQs - Health module changes](#)
- [FAQs - IHS quick launch tool](#)
- [FAQs - Reuse of AMS Health Certificates](#)
- [FAQs - Transition for applications](#)

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Known issues in AMS

As at 26 March 2018, after the release of the AMS SC1 changes, the Health Module has been disabled and Health Details need to be recorded within an applicant's application instead of creating a Health Certificate.

The following are the known issues in AMS for release (V.10.14.0701).

Note that these issues may impact other visa types as well as those stated in the scenarios below.

For any of these issues or new issues found regarding the AMS functions, including if you don't have the correct access permissions for the Health Details or IHS quick launch functionality, please contact the MBIE Service Desk: service.desk@mbie.govt.nz in the first instance.

Overview of Determination behaviour

As part of this change, we have implemented a check so that no auto-selection will be made if the user has already saved determination answers by clicking [ok]. This is to prevent users from having their intentionally selected answers from being changed by the system, i.e. if they want to waive the health question.

Note that any new selection of the ASH Question (e.g. 'Waive') will only be retained if the user clicks [OK]. The [cancel] button at Determination doesn't save the ASH Question selection if manually set by the user, and the selection defaulting back to the last saved / auto-selected answers. This is existing production behaviour, and applies for all determination answers, based on Pre-Prod (10.14.0301).

ASH Question selection behaviour is inconsistent when health details are edited for an applicant in an application at Determination

If the user edits the health details (in the applicant's tab) during Determination (e.g. to add in the Health Outcome), when the ASH question is viewed in the Determination screen, the wrong answer may be displayed.

For example, when the health outcome is added as 'Not ASH' for an applicant, the ASH question may not reset to 'No' but show as previously saved at Determination.

However, the user is not stopped from manually selecting the correct answer and completing the processing the application.

What you need to do

Users should always ensure that the required health details are added for all applicants that require them. Then check that the answer to the Determination ASH question is set correctly for the application they are processing.

Where the ASH question is not set correctly, the user must take corrective action (that is manual selection of the correct option) and save as per normal practices.

Determination ASH Question selection is not as expected and is inconsistent for multiple applicants in an application [IPS-47]

The default selection for the ASH Question is displaying incorrectly at Determination for applications with multiple applicants that require health details. However, the user is not stopped from processing the application.

Scenario: Health Details (NZER/HR and Health Outcome) have been added and saved for the Primary Applicant. When NZER/HR (with no Health Outcome) is added for the Secondary Applicant, the ASH Question incorrectly moves to 'No' but should remain on 'In Progress' as only partial health details have been saved for the secondary applicant.

What you need to do

The user must take corrective action and manually select the 'In Progress' option for ASH Question in Determination where it does not reset correctly.

Determination ASH Q default selection is not as expected for Student Full Fee paying PHD visa applications [IPS-50]

The ASH question selection at Determination is displaying incorrectly. Note that this issue showed sporadic behaviour and was not seen with every application, and may impact other visa types as well as Student applications.

However, the user is not stopped from manually selecting the correct answer and continuing the processing of the application.

Scenario: For a full fee paying PHD student visa, at Determination step, when the user enters NZER/HR (no Health Outcome yet) and the health details are saved (user clicks [OK]), the ASH Question continues to show a 'No' (it does not change to 'in Progress' as it should).

What you need to do

The user can manually select 'Yes' and proceed further with the processing of the visa.

Incorrect behaviour of the ASH question validation pop-ups for applications with multiple applicants [IPS-70]

Multiple validation pop-ups appear at Determination for an application with multiple applicants that require medicals when the user manually selects an answer for the ASH question.

This issue is applicable to all visa types (except Residence visas) for any applicants that require medicals.

Scenario: When the user selects Edit at Determination and manually selects "Yes" for the ASH Question, the validation pop-up appears:

"You may not answer the Yes to the health question unless all applicants on this application have a Health Outcome of ASH or ASH with conditions".

When the user clicks "OK" to close the pop-up, a second validation pop-up incorrectly appears:

"You may not answer the No to the health question unless all applicants on this application have a Health Outcome of ASH or ASH with conditions".

What you need to do

The user can click "Ok" to ignore the validation pop-ups, however, they must check that the Determination question is correctly set for the application and if not, then manually reset it and save as per normal practices. Complete the required health details for the applicant's that require medicals in the application before completing determination.

Some existing BAU issues found during UAT

The as-built functionality where AMS determines if a medical is required according to the lodgement questions and other lodgement criteria such as the 'health check flag', and determination validation criteria has not been changed from the current functionality i.e. it matches the current functionality and system rules. The only change is now the validations for lodgement and determination point to the new Health Details instead of a Health Certificate.

The following are the known BAU issues that impact the Health Details validations at Lodgements and / or Determination.

Applications that may require health details do not show the correct default selection for lodgement or determination health question in AMS

Some application types where we expected that medicals would need to be required, did not behave as expected. This means that there may be some application types that require medicals according to immigration instructions, but the health question in the Lodgement screen defaults to 'Yes' or 'Waive' instead of 'No', therefore bypassing the need to add health details to the application.

This also relates to the defaults for the Determination ASH question and the pop-ups not showing where medicals were expected for the application type. This is current production behaviour.

What you need to do

For applications that require medicals but the system has bypassed the validations to add them, then the user should either waive the Lodgements health question or add the Health Details at Lodgements to be in agreement with the default selection set by the system.

Editing Determination ASH answer for a rolled back application exhibits incorrect behaviour when saving changes [IPS-56]

When editing the answer to the Determination ASH question for a rolled back application, it exhibits an incorrect behaviour when saving changes and presents an 'Update Fail' pop up with message:

"This record was being updated by another officer at the same time you were updating. Your changes have not been saved".

In addition, the determination screen continues to present as editable even after clicking Apply and OK, which is inconsistent with how other application types behave.

This is current production behaviour as a result of when an application is rolled-back to a change in determination question answers, and the save of determination questions does not complete correctly. The determination screen remains editable despite the user having clicked [ok], due to the user being redirected to the 'Application Summary' screen. This causes the error when the user clicks [ok] upon returning to the determination screen and the user is presented with 'Update Fail' message instead of the screen being disabled from editing as the changes have been applied.

What you need to do

The user must close and then re-open the application to refresh it once answers at Determination have been edited and the Apply and OK have been clicked.



Managing the Health Status report for the Office

When to use

This process is used to identify applications that have had their health status updated and are now able to be processed. It would normally be completed on a daily basis.

Role

- All roles

Prerequisites

- Access to run the report.

Context

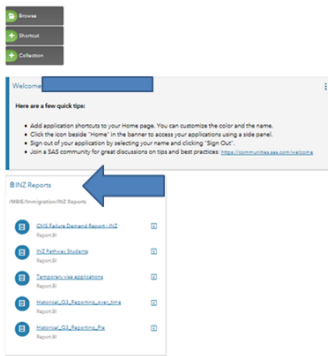
This process allows a nominated person in the office to run a report to identify applications that have had a change in health status. This saves each Immigration Officer manually checking for the applications in their caseload and is therefore a more efficient process for managing applications waiting on medical outcomes.

Steps

1. You can access the 'New Health case Status Update report' by clicking this link:

<https://vaweb.wd.govt.nz/SASVisualAnalyticsHub/index.jsp>

This will take you to the Portal homepage.



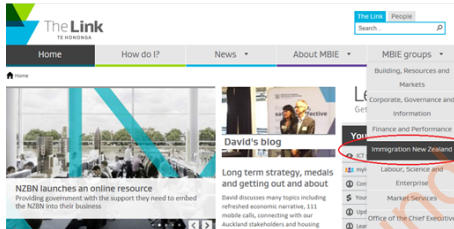
Go the INZ reports section and select the 'Health case status Report Update'.

Continue at step 4, or alternatively follow the instructions below if the link does not work.

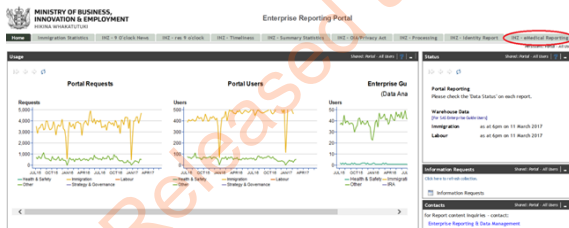
2. Open the intranet in a web browser

3. Open the Enterprise Reporting Tool

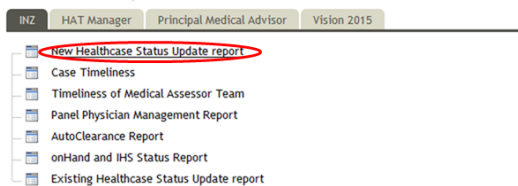
From 'The Link' homepage select MBIE groups and then 'Immigration New Zealand'



Under the 'Resources' tab, click on the 'Enterprise Reporting Tool', then select the 'INZ – eMedical Reporting' tab on the navigation bar.



Click on the 'New Health case Status Update report'



Or on the 'New Enterprise Reporting' link

Export or Save As

Rows:
 All rows
 Rows From 1 To 1

Columns:
 All columns
 Selected columns:
 Officer
 Appl Nbr
 Applicants
 Applicant Type
 Client ID

Formatted data

Export to: Excel 2007 Workbook (*.xlsx)
 Save as: Tab-Separated Values (*.txt)

OK Cancel

| Client ID | Applicant Type | Applicant | Applicant Nbr | Officer | Client ID | Applicant Type | Applicant | Applicant Nbr | Officer | Client ID | Applicant Type | Applicant | Applicant Nbr | Officer |
|-----------|----------------|-----------|---------------|---------|-----------|----------------|-----------|---------------|---------|-----------|----------------|-----------|---------------|---------|
| ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... |

8. Notify officers

Email the excel sheet to the case officers (or appropriate queue managers) with applications appearing in the report and cc their respective TAs or IMs.

Notes:

- If a health case cannot be found on the report it is likely that the health case has not been linked to the AMS application/client in IHS. Officers should log into IHS and update the AMS application and client identifiers.
- If a health case is incorrectly assigned to an officer the AMS application identifier in IHS may not have been updated correctly. Log into IHS and update the AMS application identifier.

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
- View the Client History Report
- Client History Report Process
- Communications to HAT
- Recording Health Details in AMS
- FAQ
- IHS Training Videos
- Immigration Health System (HAT)
- Hidden Footnotes

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FAQs - Visa Details in IHS

What are the Visa Details in a health case in IHS?

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

The Visa Details in IHS are described in two parts as:

- Visa Application Identifiers
- Visa and Referral Details.

The Visa Details can be viewed and updated in the Identifiers tab of a health case by an IO or HAT user. The Visa Details can also be viewed and updated from the Case Summary tab.

Note for IOs: If any of the Visa Details (AMS Client Id, Visa Application #, Visa Category, Visa Type, Length of Stay and Referral Type) are not present in the health case in IHS or have changed for the visa application being lodged or assessed, the visa processing IO must update these details to ensure the health case is assessed based on the correct referral details.

Important Note: The Visa Details presented in the Identifiers tab may not be the visa details used in a previous assessment if the health case has already been assessed.

To find the visa details used for a previous assessment, refer to the Outcome History table on the Case Timelab tab. Also on this tab is where you can find a history of any Visa Details changes on the health case.

What are the 'Visa Application Identifiers'?

Applicable for IO users

The 'Visa Application Identifiers' in a health case are:

- AMS Client Id
- Visa Application # (AMS application number)
- Person Id (the number assigned to the client by IGMS)

The 'Visa Application Identifier' details are provided by the visa processing IO when they update a health case when the visa application is being lodged or assessed.

When you first view a new health case in IHS, the 'Visa Application Identifiers' fields will be blank.

So that the health case is 'claimed' for a specific visa application, even if it is already been assessed, these fields must be updated with details of the new application. At this time, it is also important to update the Visa and Referral Details.

Important note: The 'Visa Application Identifier' fields can be updated in the Identifiers tab of the health case by the IO user. They can also be viewed and updated on the Case Summary tab of a health case by IO and HAT users.

What are the 'Visa and Referral Details'?

Applicable for IO users

With the updates to IHS in August 2018, the visa categories and types for a health case have been changed to more closely align to those used in AMS and IGMS.

The Visa and Referral Details in IHS comprise of the following details:

- Visa Category
- Visa Type
- Length of Stay (for temporary visas only)
- Referral Type
- Referral Note

The Visa and Referral Details are used as the health criteria for the assessment of the client's health case. They are also used by the system rules to match to a Medical Assessor when the health case is referred to them for a medical opinion. So it is very important that they are correct for the assessment being undertaken.

The Visa Category, Visa Type and Length of Stay values are defined by the information that the client provided to the panel physician at the time they undertook their medicals for their visa application. The Referral Type value is derived by the system based on the medicals submitted within the health case.

The 'Referral Note' is a free-text field to record any additional details to inform the HAT or MA on what needs to happen next for the health case. This is instead of emailing the HAT. It is very important that you record any further information in this 'Referral Note' field to provide the HAT with necessary information on how the health case should be dealt with. For example, you have selected the re-open reason of 'Disputing/deferral information received' and on the 'Referral Note' field you can indicate what type of disputing information the client has provided.

The 'Visa and Referral Details' can be updated in the Identifiers tab by an IO user when recording or updating the 'Visa Application Identifiers'.

The 'Visa and Referral Details' can also be viewed and updated in the Case Summary tab of a health case (by both IO and HAT users).

Important note for IOs: When you add or update the 'Visa and Referral Details' (along with the 'Visa Application Identifiers'), you are 'claiming' the health case for the application that you are lodging or assessing. Always add in the reason why you are updating the visa application identifiers and visa referral details in the 'Referral Note' field.

What do the Visa Details look like?

Applicable for IO users

When you first view a health case in IHS in the Identifiers tab, you will see the current Visa Details saved against a health case:

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

The top three fields are the 'Application Identifiers' and the remaining fields are the 'Visa and Referral Details'.

When you first view a new health case in IHS, the 'Application Identifiers' fields will be blank. These details need to be

When you first view a new health case in IHS, the Application Identifiers fields will be blank. These details need to be entered against the relevant health case by the visa processing IO when a visa application is lodged or is being assessed.

s9(2)(a) of the OIA

Identifiers

AMS Client Id

Visa Application #

Person Id

Visa Category: Temporary

Visa Type: Visitor without job offer

Length of Stay: More than 24 months

Referral Type: General

Referral Note

This text is configurable.

Cancel Full View Re-open Save

The 'Visa and Referral Details' (Visa Category, Visa Type, Length of Stay and Referral Type) fields will initially be populated with the visa details provided when the health case was submitted from eMedical. These will need to be updated in the health case by the visa processing IO when the visa application is lodged or assessed where they are different from what is already recorded in the health case.

The Referral Note field will initially be blank. It is used to record any additional details for the medical referral that you want the HAT or the Medical Assessor (MA) to be aware of or to note during their assessment. For example, that a new application has been received and the further tests need to be prescribed so the case can be assessed. This field will need to be populated by the visa processing IO when you update the visa application identifiers and visa and referral details so that the HAT or MA knows what needs to happen next for the health case.

By updating the Visa and Referral Details with the details of the new application, the health case is 'claimed' for that visa application, even if it is already been assessed. This is instead of having to email these details to the HAT when a new visa application is received.

Note: When updating the visa details, it is important to record the reason why you are doing so within the 'Referral Note' field to inform the HAT or MA what needs to happen next. It should include any additional details that the MA or HAT needs to be aware of during the assessment. This is instead of emailing the HAT.

Applicable for IO and HAT users

Visa Details are also presented at the bottom of the Case Summary tab like this:

Visa Details

Visa Category: Temporary

Visa Type: Student

Length of Stay: 6-12 months

AMS Client Id

Visa Application #

Person Id

Referral Type: General

Referral Note

eMedical

Visa Category: Temporary

Visa Type: Student

Length of Stay: 6-12 months

Intended Work Activity

Cancel Full View Re-open Save

The original Visa Category, Visa Type and Referral Type details that were submitted to IHS (as provided by the client to the Panel Clinic when the health case was created) are shown within the eMedical section at the bottom right hand corner of the Case Summary tab.

The Visa Details in the left-hand section are the details that can be updated. When you first view a new health case in IHS, the 'Visa Details' section fields will be populated with the visa details provided when the health case was submitted from eMedical. So both sections in the Case Summary tab may appear the same as shown in the screen shot above.

Important note for IOs: If any of the Visa Details (AMS Client Id, Visa Application #, Visa Category, Visa Type, Length of Stay and Referral Type) are not present in the health case in IHS or have changed for the visa application being lodged or assessed, the visa processing IO must update these details to ensure the health case is assessed based on the correct referral details.

Where can the Visa Details be updated from?

Applicable for IO users

Visa Details ('Visa Application Identifiers' and the 'Visa and Referral Details') can be updated in the Identifiers tab by an IO user when a new visa application is lodged or being assessed.

The 'Visa and Referral Details' can also be updated from within the Case Summary tab by IO and HAT users.

Important Note: The 'Visa Application Identifiers' can be updated in the Identifiers tab as well as the Case Summary tab.

Why do I need to update the 'Visa Application Identifiers'?

Applicable for IO users

The 'Visa Application Identifiers' must be updated with the new visa application details to be used for the assessment of the health case. This is so that there is a defined link between the health case and the corresponding application in AMS. These fields also facilitate the data warehouse 'Health case status update report' so it is important that they are updated and correct, particularly the AMS Client ID field.

The 'Visa Application Identifiers' details will be blank when you first view a new health case as shown in this example shown below for an auto-assessed health case:

Identifiers

AMS Client Id

Visa Application #

Person Id

Visa Category: Temporary

Visa Type: Visitor

Length of Stay: More than 24 months

Referral Type: General

Referral Note

This text is configurable.

Cancel Full View Re-open Save

By updating the 'Visa Application Identifiers' details (along with the Visa and Referral Details) with the details of the visa application, even if the health case has already been assessed, the health case is still being 'claimed' for that visa application that you are lodging or assessing.

The Person Id (the id number assigned to the client by IGMS) field does not always apply to an application and therefore may not need to be updated. In some situations, the IO may choose to add in the passport or Identification number in this field instead, as they do currently.

Note: The 'Visa Application Identifiers' can be updated by the IO user from the Identifiers tab and Case Summary tab.

Why do I need to update the 'Visa and Referral' details?

Applicable for IO users

As part of the health assessment to determine a client'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.

When a visa application is being lodged or assessed, the visa processing IO should check the current visa details in the relevant health case to view if they have changed or they are blank.

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

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

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

- Put a health case on hold in IHS

You should also update the Visa Details (AMS Client Id, Visa Application #, Visa Category, Visa Type, Length of Stay and Referral Type) to 'claim' the health case for the new application you are lodging or assessing, even if you don't re-open it.

In the Referral Note free-text field, add in the details of why you have updated the Visa Details to inform the HAT or MA of what needs to happen next for the health case.

Important note: If any of the Visa Details (AMS Client Id, Visa Application #, Visa Category, Visa Type, Length of Stay and Referral Type) are not present in the health case in IHS or have changed for the visa application being lodged or assessed, the visa processing IO must update these details to ensure the health case is assessed based on the correct referral details. The information in the Referral Note field will advise the HAT or MA the details for the referral. This is instead of emailing the HAT.

When should I update the Visa Details in a health case?

When a visa application is being lodged or assessed, the visa processing IO should check the current visa details in the relevant health case and if they have changed from what is already saved in the health case or they are blank, then update them.

You may not need to update all the Visa Details for an auto-assessed ASH health case (as it can be used for a Temporary or Residence visa application if the application is submitted within the 3 months validity period).

Update the 'Visa Application Identifiers' fields to 'claim' the health case assessment outcome for the new visa application so that the reporting across both AMS and IHS systems can be linked.

Add in the details of why you have updated the Visa Details within the Referral Note free-text field to inform the HAT or MA of what needs to happen next for the health case.

What fields do I need to update?

Applicable for IO users

You can update the AMS Client ID, Visa Application #, and Person ID fields in the 'Identifiers' tab as per current functionality.

You will also be able to update these new 'Visa and Referral Details' fields in the 'Identifiers' tab:

- Visa Category
- Visa Type
- Length of Stay
- Referral Type
- Referral Note.

This information will be used by the MA (and the HAT) when completing their assessment of the health case. The visa details are also used to 'claim' the health case for a visa application.

Remember to add in the details of why you have updated the Visa Details in the Referral Note free-text field to inform the HAT or MA of what needs to happen next for the health case.

Important note: If any of the Visa Details (AMS Client Id, Visa Application #, Visa Category, Visa Type, Length of Stay and Referral Type) are not present in the health case in IHS or have changed for the visa application being lodged or assessed, the visa processing IO must update these details to ensure the health case is assessed based on the correct referral details. The information in the Referral Note field will advise the HAT or MA the details for the referral. This is instead of emailing the HAT.

How do I update the fields?

You can update the Visa Details in the Identifiers tab by directly typing in the fields (like for the 'Visa Application Identifiers') or clicking in a field and selecting from the drop-downs.

Select the options in the drop-down that do not have the clock icon. In the example below, the ones to select are from the top three values in the Visa Category list:

s9(2)(a) of the OIA

Client History Manual Assessment

Case Summary Case Timelines Further Requirements

Identifiers

AMS Client Id s9(2)(a) of the OIA

Visa Application # s9(2)(a) of the OIA

Person Id 1

Visa Category Temporary

Visa Type

Length of Stay

Referral Type

Referral Note

- Temporary
- Residence
- Work to Residence
- Family 19/02/2018
- Humanitarian 19/08/2018
- Pacific Residence 19/08/2018
- Visitor 19/08/2018
- Student 19/09/2018

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 usually be identified by the clock icon before the label in the drop-down list showing that they have expired or will expire soon, like this example below of an old 'Length of Stay' value:

Length of Stay

- Permanently

Updating Visa Details in the Case Summary tab

You can also update the 'Visa and Referral Details' and the 'Application Identifiers' in the Case Summary tab by clicking the 'Edit visa details' pencil icon at the top right of the eMedical section:

The Referral Type is used to define whether the health case will be assessed under General or Limited INZ medical referral guidelines.

The Referral Type value is generated by the system based on the type of medical certificates attached to the health case when it is submitted from eMedical. The Referral Type value can be changed by the visa processing IO, if it is incorrect or the health case needs to be re-assessed under different guidelines, within the Identifiers tab or the Case Summary tab.

Important Note: You may need to update the Referral Type value to the new value (General or Limited), it is incorrect for the Referral Type to be blank.
Refer to [SOP IHS Visa Details 'Identifiers' Cheatsheet](#) for guidance.

What details should I put in the Referral Note?

Applicable for IO users

When updating the Visa and Referral Details fields in the Identifiers tab, you can add in notes for the referral within the Referral Note field.

This is a free-text field for any additional details that you want the HAT or the Medical Assessor (MA) to be aware of or to note during their assessment. It is especially important to record a reason why you are updating a health case in an 'Open' state, or if there was an identity concern for a client and you are releasing the case from on hold, you can add in the note to let HAT know that the identity concern has been resolved.

Other scenarios are: if additional information has been uploaded into the health case and the health case can now have its assessment completed; or a new application has been received and the proposed further requirements (tests) now need to be prescribed.

Examples of referral notes:

- *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 all medicals submitted."*
- *Disputing information has been attached. Please refer for reconfirmation of Not ASH opinion for Residence.*
- *New visa application received. Additional information uploaded. Please refer for re-assessment for previous ASH with conditions.*
- *'Incomplete' health case re-opened. Expired medicals accepted by [IO name] for the new visa application.*

Important Note: It is essential to record the reason why you are updating the visa details of a health case within the Referral Note field. Include any additional information to inform the HAT or MA what needs to happen next for the health case. This is instead of emailing the HAT.

Refer to [SOP Cheatsheet - IO actions in IHS for communications to HAT](#) for examples of Referral Notes for the different actions in IHS.

Can I change the Visa Details for an 'Assessed' health case?

Applicable for IO users

Yes, you can edit the 'Visa and Referral Details' (Visa Category, Visa Type and Referral Type) in a health case after it has been finalised as Assessed. You can do this in the Identifiers tab when you add in the 'Application Identifiers' (AMS Application # number, Client Id) to claim it for a new visa application.

However, you should only change the visa details in an 'Assessed' health case in exceptional circumstances (and do so with caution).

For example, if you are going to use the health case for a new visa application or it needs a re-assessment under different health criteria or the client's health condition has changed. This is specifically important for an auto-assessed health case as you may not need to update all the Visa Details for an auto-assessed ASH health case (it can be used for a Temporary or Residence visa if the application is submitted within the 3 months validity period of the medicals completion date). You should update the 'Visa Application Identifiers' to 'claim' the health case assessment outcome for the new visa application.

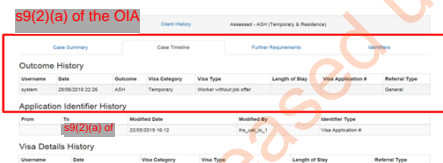
You would most likely update the visa details in an 'Assessed' health case when you receive a new visa application and the Visa Category, Visa Type and Referral Type details in the health case are different from what it was previously assessed against. For example, if the outcome is ASH with conditions for temporary but the client is applying for a residence visa.

Another scenario would be if the previous case was assessed as ASH with conditions or deferral where the client has been required to submit additional health information. The health case may need to be re-opened as well.

Before you update the visa details in a health case, confirm the Visa and Referral Type details that the health case was assessed under previously. Check the health assessment outcome and visa category displayed in the health case status bar (this is the grey banner at the top of the health case screen).



Look in the Outcome History tab of the Case Timeline tab for details of the last assessment.



Also check the Health Assessment notes (where these are available).



You must update the Visa Category, Visa Type and Referral Type details in the 'Identifiers tab' of an 'Assessed' health case before you can reopen it for reassessment for a new visa application. Only update the fields if they are not correct or are required. If the values displayed are already correct and mandatory fields are all populated, then you don't need to update them.

Note: A health case can be re-opened for a reassessment and a HAT user may also update the Visa Details.

In this example below the Visa Details have been updated for a new Temporary Student visa. The original visa was a Temporary Visitor visa. The application identifiers have been updated as well so that the previous assessment can be applied to the new application.

| Identification Details | | | | | |
|--------------------------|-------------------------|-----------------|------------------|---------------|----------------|
| Presented For | Document Type | Document Number | Country of Issue | Date of Issue | Date of Expiry |
| SV40 Examination results | Certificate of identity | 89(2)(a) of th | Bangladesh | 02/09/2018 | 29/09/2026 |
| SV40 Register | Certificate of identity | 89(2)(a) of th | Bangladesh | 02/09/2018 | 29/09/2026 |

| Visa Details | | eMedical | |
|--------------------|--------------------------|------------------------|---------------|
| Visa Category | Temporary | Visa Category | Temporary |
| Visa Type | Student | Visa Type | Visitor |
| Length of Stay | 12 - 24 months | Length of Stay | 6 - 12 months |
| AMS Client Id | 89(2)(a) of th | Intended Work Activity | |
| Visa Application # | 1 | | |
| Person Id | | | |
| Referral Type | General | | |
| Referral Note | Add a referral note here | | |

Important Note: You must record the reason why you are updating the details in a previously assessed health case within the 'Referral Note' field. Include any additional information to inform the HAT or MA what needs to happen next for the health case. This is instead of emailing the HAT.

Do I need to update the Visa Details in an auto-assessed health case?

Yes, it is important to update the Visa Details in an auto-assessed health case to 'claim' the health case for the new application you are lodging or assessing.

You may not need to update all the Visa Details for an auto-assessed ASH health case (as it can be used for a Temporary or Residence visa application if the application is submitted within the 3 months validity date of the medical completion date and therefore won't need to re-opened).

You should update the 'Visa Application Identifiers' (AMS Client Id, Visa Application #) to 'claim' the health case assessment outcome for the new visa application.

You could update the other Visa Details (Visa Category, Visa Type, Length of Stay and Referral Type) also if required.

Add a Referral Note if you update any of these details.

Important Note: It is especially important that you record the reason why you are updating the details in an auto-assessed health case. Include any additional information if required to inform the HAT or MA what needs to happen next for the health case. This is instead of emailing the HAT.

For example, if you are updating the details to 'claim' it for a new application received and the auto-assessed outcome can be applied.

Can I change the Visa Details for a health case that is in 'Medical Opinion' state?

Applicable for IO users

No, you cannot change any of the Visa Details in a health case when it is in 'Medical Opinion' state in IHS (while it is being assessed by a Medical Assessor).

You can only update the Visa Details when the health case is in 'Manual Assessment', 'Hold', 'Awaiting Further Requirements' or 'Assessed' states.

If the health case is in 'Medical Opinion' and the Visa Details are incorrect, then you will need to wait for the assessment to be completed or advise HAT via email instead.

Note: If you need the visa details changed for a health case because it is incorrect for the visa application being assessed, then advise HAT immediately.
Refer to the [SOP Sending communications to HAT](#).

Can I change the Visa Details for a health case in a 'Hold' state?

Yes, you can change the Visa Details in a health case if it is on 'Hold'. You can also add attachments to a health case when it is in this state. But only if it has a Hold Reason of 'Manual Assessment held pending information from IO'. Adding attachments can only be done before you release a health case from the on hold state.

Note: You must record the reason why you are updating the details of a health case that is on hold within the 'Referral Note' field. This information is used to inform the HAT or MA what needs to happen next for the health case, instead of emailing the HAT. For example, you are updating the health case as you have received the relevant application so the health case can be assessed after it is released.

Can I change the Visa Details for a health case in any other state?

Yes, you can also update the Visa Details when the health case is in a 'Manual Assessment', 'Hold', 'Awaiting Further Requirements' or 'Assessed' state.

You cannot update the Visa Details if the health case is in an 'Obsolete' or 'Medical Opinion' state.

Refer to Health Case States training video for more details on the health case lifecycle and states in IHS. Also refer to [SOP Check the Health Case Status in IHS](#).

What Visa Details are recorded in a health case?

Any changes to the Visa Details on a health case are recorded on the Case Timeline tab, in the Visa Details History table.

The Visa Details that were current at the time that the medical opinion was provided are also recorded on the health case. This is viewable on the MA Opinion tab (you will need to be in Full View to see this tab).

The Visa Details that were current at the time the health case was finalised (Assessed) are also recorded on the health case. This is viewable on the Case Timeline tab (you don't need to be in Full View to see this tab).

Note: If the Referral Note field is updated in the visa details section (usually by the IO) then it will overwrite any previous referral note.

The Referral Note that was entered at the time the health case was reviewed by a Medical Assessor will display against their medical opinion. This is viewable on the MA Opinion tab (you will need to be in Full View to see this tab).

Where do I find the original Visa Details submitted from the client?

The original Visa Category, Visa Type, and Length of Stay details that were submitted to IHS (as provided by the client to the Panel Clinic when the health case was created in eMedical) are viewable within the Visa Details section at the bottom of the Case Summary tab of the health case.

The Visa Details are divided into two sections:

- the original eMedical details
- the current Visa Details.

The eMedical section is on the right-hand side of the Case Summary tab. It shows the original visa details (Visa Category, Visa Type, Length of Stay and Intended Work Activity) when the health case was first submitted from eMedical.

The Visa Details section on the left-hand side of the Case Summary tab shows the current visa details (Visa Category, Visa Type, Referral Type, and Length of Stay) as well as the Visa Application Identifiers (AMS Client Id, Visa Application #, Person Id) saved for the health case.

The Referral Type value is derived from the type of medical certificate(s) included in the health case as defined in the system business rules, unless it has since been updated by an IO or HAT user.

If the Visa Details have not been changed, the left-hand-side section will show the same Visa Category, Visa Type and Length of Stay as the eMedical values. This is because the Visa Details section is initially pre-populated with the values from eMedical, as shown in the example below.

How do I find what the Visa Details were when a medical opinion was made?

Applicable for IO and HAT users

When the Medical Assessor submits their opinion or prescribes tests (regardless of the opinion selected), the visa details in the health case that were current at that time the medical opinion was made are recorded against that medical opinion. These visa details can be viewed in the MA Opinion tab (you will need to be in Full View to see this tab).

Each Medical Opinion in a health case will display the Visa Category, Visa Type, Visa Application #, Referral Type and Referral Note details applicable when the medical opinion was made as shown in this example:

Note: An IO user will need to be in Full View to see the Medical Opinion tab.

How do I find what the Visa Details were when the case was finalised?

Applicable for IO and HAT users

When a HAT finalises the health case outcome, the Visa Details (Visa Category, Visa Type, Visa Application #, Referral Type and Referral Note) that were current at that time are recorded against the assessment.

The Visa Details for an assessment are viewable in the health case, in the:

- Case Timeline tab within the Outcome History table
- HAT Assessment tab within the assessment details.
- MA opinion tab within the Medical Opinion section

The Case Timeline tab

The Outcome History table in the Case Timeline tab records the date, Outcome, Visa Category, Visa Type, Length of Stay, Visa Application #, and Referral Type current at the time the health case was finalised.

The Application Identifier History table records if the Application Identifiers (Person Id, Visa Application # and AMS Client Id) have been updated.

Note: If there was a Referral Note with the Visa Details at the time it was finalised, then this will not be recorded in the Outcome History of the Case Timeline tab. The Referral Note is viewable in the Case Summary, Identifiers and MA Opinion tab.

The Referral Note that was entered at the time the health case was reviewed by a Medical Assessor will display against their medical opinion. This is viewable on the MA Opinion tab (you will need to be in Full View to see this tab).

The HAT Assessment tab

Applicable for IO and HAT users

The HAT Assessment tab shows the visa and referral details (Visa Category, Visa Type, Visa Application #, and Referral Type) that were current at the time the health case was finalised:

Why have the Visa Details changed in the health case?

IO and HAT users may update the Visa Details of a health case.

In some scenarios, due to their specific circumstances a client may need to apply for both a temporary and residence visa at the same time. When they submitted their medical information to INZ, the client may have advised the Panel Physician that they were applying for a Residence visa, however, when submitting the application to INZ, they were advised that they needed a temporary visa for their time in New Zealand to cover the time required to process the residence visa. Therefore, the health case was submitted as requiring a Residence visa assessment but first needs a Temporary visa assessment.

In another scenario, you may have updated the details of a health case to trigger a medical referral for a specific visa application, and have now been advised that the health case has been assessed, but when you re-checked it in IHS you see that it has been assessed under different criteria to what you requested.

If you look in the Case Timeline of the health case, you can see if another IO has changed the Visa Details for this health case for another application after you had originally referred the case.

In the example below, the Visa Details shown in the left have been updated from what was originally submitted in eMedical:

| Visa Details | |
|--------------------|--------------------|
| Visa Category | Residence |
| Visa Type | Skilled / Business |
| Length of Stay | S9(2)(a) of the O |
| AMS Client Id | S9(2)(a) of the O |
| Visa Application # | S9(2)(a) of the O |
| Person Id | |
| Referral Type | General |
| Referral Note | |

| eMedical | |
|------------------------|------------------|
| Visa Category | Family |
| Visa Type | Guardian |
| Length of Stay | Less than 1 year |
| Intended Work Activity | |

The **Visa Details** section will display the updated visa details provided by the IO (submitted from the Identifiers tab) where those are different from the details originally submitted for the health case from the panel doctor.

eMedical Visa Details are those originally submitted for the health case from the applicant via the panel doctor.

Note: If the Visa Details have not been changed, the left-hand-side section will show the same Visa Category, Visa Type and Length of Stay as the eMedical values shown on the right-hand side.

What else can you do?

You can update the Visa Details in the Identifiers or Case Summary tab and then re-open a previously assessed health case to trigger a new assessment for the visa application you are processing. The health case will go to HAT for a manual assessment.

You should update the Visa Details (AMS Client Id, Visa Application #, Visa Category, Visa Type, Length of Stay and Referral Type) to 'claim' the health case for the new application you are lodging or assessing, even if you don't re-open it.

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

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

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

- Put a health case on hold in IHS

You can also upload attachments to the health case in some circumstances e.g. if it is on hold awaiting some information from the IO or you have re-opened a previously assessed health case for a new assessment.

Important Note: Always add in a 'Referral Note' with the reason why you are updating the Visa Details to inform the HAT or MA of what needs to happen next on the health case. This is instead of emailing the HAT.

References

The following training and guidance material is available to help with the 'how to' of the new IHS functions.

- [SOP Update the Visa Details in a health case in IHS](#)
- [SOP IHS Visa Details 'Identifiers' Cheatsheet](#)
- [Training video: Updating the Identifiers tab](#)
- [IHS Manual](#): Identifiers tab, Edit Visa Details
- [Update visa details process map](#)

Also refer to:

- [SOPs: Searching for a Health Case in IHS, Check the Health Assessment Outcome in IHS, and Check Health Case Status in IHS.](#)
- [SOP Put a health case on hold in IHS](#)
- [SOP Release a health case from on hold](#)
- [SOP Re-open a health case in IHS](#)

See Also

- [FAQ](#)
- [FAQs - 'Auto-Assessed' health cases](#)
- [FAQs - Add attachments to a health case](#)
- [FAQs - Re-opening health cases in IHS](#)
- [FAQs - Health deferrals in IHS](#)
- [FAQs - Paper medicals](#)
- [FAQs - Hold or Release a health case in IHS](#)

Released under the Official Information Act 1982

FAQs - 'Auto-Assessed' health cases

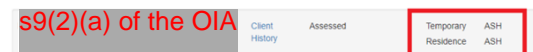
This guide will assist IO users in the Immigration Health System (IHS) to identify if a health case has been automatically assessed by the system and identify if it applies to the visa application and if it needs to be re-opened for a new assessment.

What is an auto-assessed health case?

An auto-assessed health case is one that has been assessed to have an acceptable standard of health (ASH) or ASH with Conditions (applicable for Temporary visas only) without requiring a referral to the HAT or a Medical Assessor (MA). Most health cases in IHS will be auto-assessed.

How can I tell if a health case is 'auto-assessed'?

The health case banner of a health case displays the health assessment outcome. Auto-assessed health cases will display in IHS as 'ASH' for both Temporary & Residence categories.



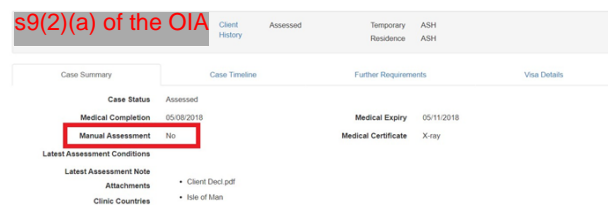
Post August 2018 (since IHS Phase 2.0)

All health cases that were submitted to IHS during and after August 2018, and were auto-assessed as ASH will now display as ASH (Temporary & Residence). Some health cases are auto-assessed as ASH with Conditions (Temporary).

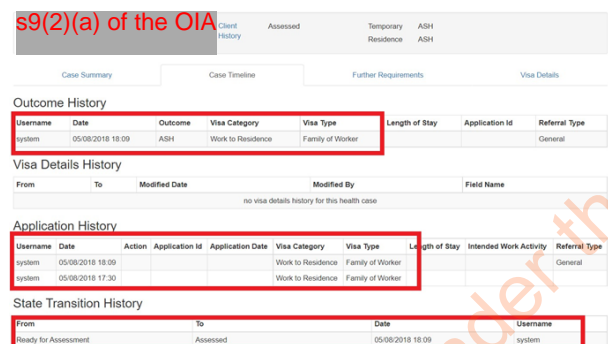
An auto-assessed health case means that re-opening it for a subsequent visa may not be necessary if the health case consists of the correct medical certificates for the current application (e.g. for a Residence visa application, the health case was auto-assessed as ASH (Temporary & Residence) and it consisted of a General Medical Certificate and a Chest X-ray Certificate). The same health case can also be used for a Temporary application since it was auto-assessed as ASH under both Temporary and Residence guidelines.

The following details will help you to identify an auto-assessed health case in IHS.

In the Case Summary tab, if the health case was auto-assessed it will say "No" in the 'Manual Assessment' field like this:



In the State Transition History table will show that the health case transitioned from 'Ready for Assessment' directly to 'Assessed' with 'system' as the Username, like this:



In Full View, the MA opinion tab will be blank (as there has been no medical opinion) like this:



When can an auto-assessed health case be used for a visa application?

If a health case is auto-assessed (ASH or ASH with Conditions), the health case is only valid for 3 months (this is the medical expiry date), unless it has been 'claimed' for a visa application (this is when a visa application has been associated with the health case in the application details section) after which the auto-assessed health case will be valid for 36 months.

If a visa application is submitted after the medical expiry date of the health case, then the applicant will need to submit new medicals.

If an auto-assessed health case outcome is ASH then the client has an acceptable standard of health which meets both temporary and residence health requirements. This is regardless of the visa application criteria which the health case was submitted under in eMedical. The health case can be accepted for any temporary or residence application if the timeframe acceptance requirements of immigration instructions A4.20 and A4.25 are met.

- If the health case has been auto-assessed as ASH based on Temporary & Residence Visa Categories and the applicant has submitted a temporary or a residence visa, then the auto-assessed ASH health outcome can be applied to the new visa application, but only if the health case has not expired and the visa application was submitted before the medical expiry date.
- 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), the auto-assessed ASH health case can be applied to the subsequent visa application.

If an auto-assessed health case outcome is ASH with Conditions then the client has an acceptable standard of health which meets temporary health immigration instructions only. In addition, the health case outcome can only be accepted as ASH for a temporary application submitted within three months of the medical completion date.

- If the health case is auto-assessed as ASH with Conditions and you have the first Temporary visa application to be assessed using this health case, then the auto-assessment can be applied to your application without re-opening the health case. Update the Application Details as required to 'claim' the health case for the application.
- If the health case is auto-assessed as ASH with Conditions, and you have a Residence visa application or a further temporary visa application, then re-open the health case to have it re-assessed. Add the new application under the Application Details to 'claim' the health case for the application.

Check with your TA or IM if you are unsure.

Note: Remember to always 'claim' the health case for the new application you are lodging or assessing, even if you don't re-open it, by adding the new application under the Application details section in IHS.

If you are re-opening an auto-assessed ASH with Conditions health case, select the re-open reason of 'Previous health outcome of 'ASH with Conditions' on the re-open drop down menu. Refer to [SOP Update the visa details in a health case in IHS](#) and [Re-open a health case in IHS](#).

See also:

- [SOPs Searching for a Health Case in IHS and Check the Health Assessment Outcome in IHS](#)
- [FAQs - Re-opening health cases in IHS, FAQs – Visa Details in IHS](#)

See Also

[FAQ](#)

[FAQs - Visa Details in IHS](#)

[FAQs - Add attachments to a health case](#)

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

[FAQs - Health deferrals in IHS](#)

[FAQs - Paper medicals](#)

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

Released under the Official Information Act 1982

FAQs - Add attachments to a health case

There is new functionality in IHS for an IO user to add attachments into a health case in certain conditions.

When can I add attachments to a health case?

You can upload attachments directly into a health case in IHS but only in certain circumstances and conditions. Uploading an attachment is mandatory during these processes if the client has provided any additional medical information.

You may add attachments to a health case when it is on 'Hold', but only if the Hold Reason is 'Manual Assessment held pending information from IO'. Attachments cannot be added to a health case if the Hold Reason is either 'Medical Opinion held pending visa acceptance' or 'Manual Assessment held pending ID resolution'. Attachments are best added while the health case is on hold, just before you release it.

Attachments can also be added during the re-open process. When a previously assessed health case is re-opened, it will transition to a 'Manual Assessment' state after which you will be able to upload attachments (this can only be done at the time the health case is re-opened).

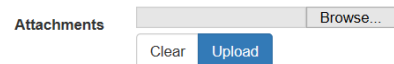
Attachments cannot be added by an IO user at any other time.

Note: If you have information to be added to the health case, contact the HAT with the details of the health case so that they can do this for you (HAT@mbie.govt.nz). Refer to [SOP Sending communications to HAT](#).

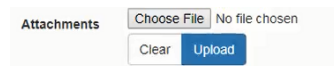
Where can I add attachments to a health case?

Documents can be uploaded into a health case from the Identifiers tab during the re-opening of a previously assessed health case or when a health case is released from hold with a Hold Reason of 'Manual Assessment held pending information from IO'.

At the bottom of the Identifiers tab, you will see the Attachments section. Click 'Browse' and go to the folder where the documents are, select Open, then click the 'Upload' button.



Note that if you are using Chrome as your Browser, it will look like this:



You will see the file(s) that you have just uploaded (as confirmation that the upload succeeded and have picked the right files) in the Identifiers tab but if you return later then you won't be able to view them there.

Documents are uploaded to the 'Attachments' section 'Case Summary' tab of a health case.

What sort of documents should I upload?

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.

For example, do not attach identity concern documentation to the health case.

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

Important Note: Once the documents are uploaded, you will not be able to delete or download them, only view them.

Where can I view the attachment?

You need to be in Full View to open the attachments to view the content of the document. Refer to [SOP Accessing Health Case 'Full View' in IHS](#).

Can I remove the attachments?

No, you cannot remove attachments once the documents are uploaded. HAT can remove attachments in the case where an IO user has uploaded an attachment that has already been attached or is incorrect.

If the documents uploaded need to be removed, contact the HAT (at HAT@mbie.govt.nz) to delete them from the health case.

Can I download the attachments?

Yes, you can download the attachments in a health case but you will need to be in Full View. Open to view the document and then save to download it to your folder.

What do I do if I cannot upload the documents?

If you cannot upload attachments directly into IHS to a health case, you can email the information through to the HAT (at HAT@mbie.govt.nz) who will upload them for you.

How do I add attachments to a health case?

The following training and guidance material is available to help with the 'how to' of IHS functions.

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

- Training videos (includes attachments): [Hold and Release a Health Case](#) and [Re-open a Health Case](#).

IHS Manual: [IO – Identifiers tab](#), [Add Attachments](#), [Hold](#), [Release](#), [Re-open Health Case](#).

Add attachments process map

The following is the high-level process map, showing when attachments may be added to a health case and the actions that precede it or can follow:

FAQs - Re-opening health cases in IHS

There is new functionality for IO users in the Immigration Health System (IHS) to re-open a previously assessed health case.

This is instead of emailing the HAT to re-open it for you.

Note: HAT user to re-open a health case in IHS has also been modified. This functionality was previously called 'Augment'.

Can I re-open a health case?

Applicable for IO users

Yes, as an IO user of IHS, you can re-open a previously assessed health case for reassessment for a new visa application. You can also add attachments to the health case after you have re-opened it.

You can re-open a health case in either the IO standard default view or in Full View in IHS.

Note: You will need to ensure all Visa Details are present and correct in a health case before you can re-open the health case. Refer to [SOP Update the Visa Details in IHS](#).

Applicable for HAT users

Yes, as a HAT user of IHS, you can re-open a previously assessed health case for reassessment as you do currently. You can also still add attachments to the health case after you have re-opened it.

Why would I need to re-open a health case?

Applicable for IO users

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

For example, the health case was assessed and determined under temporary criteria and is now required 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.

As the health case is in an 'Assessed' state (i.e. closed), it will need to be re-opened to add in any additional tests and / or refer for a new assessment.

A health case previously assessed as 'ASH with conditions' or 'Deferral' would likely need to be re-opened so that the conditions can be prescribed as further requirements for the applicant's next visa application.

When should I re-open a health case?

Applicable for IO users

You can re-open a previously assessed health case - this is instead of emailing the HAT to re-open it for you.

Important Note: Always check all the health case details carefully before you make the decision to re-open it. In many cases, a previous assessment may be valid for the application you are lodging or assessing and therefore you will not need to re-open the health case. You can still 'claim' the health case for that new application without re-opening the health case if there is a previous assessment that meets the health requirements of the new application. Do this by updating the visa details and application identifiers within the health case.

You may need to re-open the previously assessed health case so that a client's health status can be re-determined, when you have received:

- disputing information or new information for a 'Not-ASH' outcome
- a new visa application for an applicant with an 'ASH' outcome that needs to be reassessed:
 - against other visa referral criteria or
 - because the applicant's health status has changed since the last outcome.
- new medical information from an applicant where they had been required to provide additional health requirements e.g. for an 'ASH with conditions' or 'Deferral' outcome
- a request from the panel physician/ or client that their previous health case needs to be re-opened so that they can submit their tests within the existing health case to meet the 'ASH with conditions' or 'Deferral' requirements.

You may also need to re-open a health case with an 'Incomplete' assessment outcome where INZ is at fault. Always discuss with your TA or IM before you re-open an 'Incomplete' health case.

Note: The client will need to provide any further information / tests for the new application to meet the 'ASH with conditions' or 'Deferral' conditions as defined in IHS.

As the re-opened health case will be without the prescribed tests (they have not been completed yet) to meet the health requirements for the new application, HAT will need to prescribe these.

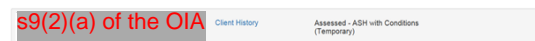
Once the further requirements have been prescribed, the applicant will be notified that they require additional tests via a generic email where they have 'opted-in' to receive INZ email notifications.

It is still the IOs responsibility to follow up with the applicant where further requirements are needed. Check with your TA or IM if you are unsure.

What should I do before I re-open a health case?

Before you re-open a health case, you should confirm the details that the health case was assessed under previously to confirm if the health case needs to be re-opened or if the assessment can be applied to the visa application you are lodging or assessing without re-opening the health case.

Check the health assessment outcome and visa category displayed in the health case status bar (this is the grey banner at the top of the health case screen).



Look in the Outcome History tab of the Case Timeline tab for details of the last assessment and any previous assessments (in case they can be applied).

| Username | Date | Outcome | Visa Category | Visa Type | Visa Application # | Referral Type |
|------------------|------------------|---------------------|-------------------|-----------|--------------------|---------------|
| Pa_Ma_Ha_admin_1 | 26/07/2018 23:34 | ASH with Conditions | Temporary | Visitor | s9(2)(a) of the | General |
| Pa_Ma_Ha_admin_1 | 26/07/2018 23:25 | ASH | Work to Residence | Worker | s9(2)(a) of the | General |

Also check the latest assessment notes (where these are available) in the Case Summary tab.

Determine if the medical is still valid or if it has expired.

- If the medical has expired, there is no need to re-open the health case unless the information is important.

- If the medical is still valid, then check if the health case has been auto-assessed or not, as you may not need to re-open the health case:

- If the health case is auto-assessed as ASH, then the auto-assessment can be applied to your application (Temporary or Residence) without re-opening the health case. Update the Visa Details (AMS Client Id, Visa Application #, Visa Category, Visa Type and Referral Type) as required to 'claim' the health case for the application.

Note: To tell if a health case has been auto-assessed or not, check in the Case Summary tab - the 'Manual Assessment' field will say "No". In the Case Timeline tab, the Outcome History and State Transition History tables will show 'system' in the Username columns. If the health case has been auto-assessed as ASH, this means that the health case assessment can be applied to Temporary and Residence, and not just to the Visa Category and Type as entered by eMedical (as shown with the 'Assessed' in the grey banner of the health case). Refer to FAQs – Auto-assessed health cases.

- If the health case is auto-assessed as ASH with Conditions and you have the first Temporary visa application to be assessed using this health case, then the auto-assessment can be applied to your application without re-opening the health case. Update the Visa Details (AMS Client Id, Visa Application #, Visa Category, Visa Type and Referral Type) as required to 'claim' the health case for the application.
- If the health case is auto-assessed as ASH with Conditions and you have a Residence visa application or a further temporary visa application, then re-open the health case to have it re-assessed. Update the Visa Details (AMS Client Id, Visa Application #, Visa Category, Visa Type and Referral Type) as required to 'claim' the health case for the new application.
- If the health case is not auto-assessed, then check the Outcome History table in the Case Timeline tab for details. Check all the details for the previous health assessment(s). Determine whether to re-open the health case or not.
- Check that the medicals in the assessed health case meet the immigration instructions criteria for the visa application e.g. a GMC or LMC and / or CXR. Refer to [SOP Checking Medical Certificates in IHS](#).

If the previous health case assessment meets all the health criteria (same Visa Category / Referral and matches all the health requirements as per instructions) for the visa application you are lodging or assessing, then you do not need to re-open the health case. You can 'claim' the health case assessment outcome for the new visa application.

Note: To 'claim' the health case for the application you are lodging or assessing, even if you don't re-open it, update the Visa Details (AMS Client Id, Visa Application #, Visa Category, Visa Type, Length of Stay and Referral Type) as required. Refer to [SOP Update the visa details in a health case in IHS](#).

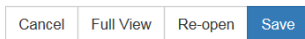
If you are going to re-open the health case for a new assessment, then you must update the Visa Details in the 'Identifiers' tab first. The 'Re-open' button will not be active until these details are all present in the health case.

How do I re-open a health case?

Applicable for IO users

You can re-open a previously 'Assessed' health case regardless of what the health outcome is (e.g. ASH, Not-ASH, ASH with conditions, Deferral or Incomplete) from the 'Identifiers' tab in IHS.

Click the 'Re-open' button in the Quick Access menu at the bottom of the screen.



Before you can re-open it, you must enter or update the Visa Details (AMS Client Id, Visa Application #, Visa Category, Visa Type and Referral Type) in the 'Identifiers tab' of the 'Assessed' health case to 'claim' the health case for the new application, then click 'Save'.

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

Note: The 'Re-open' button will not be active until these details have been added (and saved) in the health case. You may also upload attachments after you re-open the health case. This step is optional.

Do I always need to update the Visa Details when I re-open a health case?

Yes, you must always enter or update the Visa Details in the 'Identifiers tab' of the 'Assessed' health case to 'claim' it before you re-open it.

Claim the health case you are re-opening by updating the 'Visa Application Identifiers' (AMS Client Id, Visa Application #) and update the 'Visa and Referral Details', Visa Category, Visa Type, Length of Stay and Referral Type) Visa Category, Visa Type, Length of Stay and Referral Type) as required to align with the new visa application you are lodging or assessing.

Note: The Visa Details fields are required for reporting so it is important that they are updated when the health case is used for a new application.

Important Note: You can update the Visa Details and application identifiers of the health case when you are re-opening it to be referred for a new assessment.

When you re-open a health case, you must add some details in the 'Referral Note' field for why you are re-opening and updating the Visa Details to advise what you need the HAT or MA to do with the health case next. Enter any additional information into this field that you would like regarding the assessment required. For example, 'Reopened health case for new Student visa received. Please refer for reassessment under Temporary.'

Refer to [SOP Update the visa details in a health case in IHS](#) and [FAQs – Visa Details in IHS](#).

When should I re-open a 'Not-ASH' health case?

You may need to re-open a 'Not-ASH' health case when you have received disputing information.

You can re-open a 'Not-ASH' health case if you have received disputing information for the health decision and need to request the health case to be reassessed with disputing information.

In some cases, you can re-open a health case with a 'Not-ASH' outcome for Residence to be reassessed when you receive a Temporary visa application. If the residence visa was applied to the health case within the 3 months expiry date, you can re-use it for the new temporary visa application instead of getting the client to resubmit new medicals. Refer to Immigration instructions (e.g. A4.25 c).

To determine if you should re-open the 'Not-ASH' health case in this scenario, first check whether the medical has also been previously assessed under temporary guidelines, and if so, check if there is a previous ASH or AWC under Temporary. Look in the Outcome History table in the Case Timeline tab.

If there is a previous ASH or ASH with Conditions outcome under Temporary, then you can re-open the health case even though the latest health assessment outcome is 'NOT-ASH' for Residence.

If there is no previous Temporary assessment, check the medical expiry date. If the medical has expired, then the health case cannot be reused and you will need to request new medicals instead.

Note: Remember to always 'claim' the health case for the new application you are lodging or assessing, even if you don't re-open it, by updating the visa details (AMS Client Id, Visa Application #, Visa Category, Visa Type, Length of Stay and Referral Type) in the Identifiers tab with the details of the new application.

If you are re-opening a 'Not-ASH' health case, add the reason why in the Referral Note free-text field. For example, 'Disputing information attached. Please refer for reconfirmation of Not ASH opinion for Residence.'

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

When should I re-open an 'Incomplete' health case?

A health case will be assessed as 'Incomplete' by HAT either at the request of the IO (e.g. when an application is withdrawn or declined), or because the visa application has been decided, but the health case had not been assessed completely.

You may also need to re-open a health case with an 'Incomplete' assessment outcome where INZ is at fault.

For example, the client submits the CXR with Visitor Visa, but INZ did not update AMS with the NZER as CXR is not required. Then the client applies for an extension but the CXR has now expired.

Another scenario is the applicant provides a medical but the application was decided before the health case was assessed and HAT terminated the health case. When the client re-applies, you should re-open the 'Incomplete' health case as the medical should have been referred previously.

You will not need to re-open a 'Incomplete' health case where the HAT have added in an assessment note that advises the health case has been made Incomplete because another health case supersedes it. The note will advise which health case (NZER/NZHR) to refer to instead.

Check the 'Latest Assessment Note' in the Case Summary' tab which will provide the reason why the health case has been made 'Incomplete' to confirm before you re-open an 'Incomplete' health case.

Always discuss with your TA or IM before you re-open an 'Incomplete' health case.

Note: Remember to always 'claim' the health case for the new application you are lodging or assessing by updating the visa details (AMS Client Id, Visa Application #, Visa Category, Visa Type, Length of Stay and Referral Type) in the Identifiers tab with the details of the new application.

If you are re-opening a 'Incomplete' health case, add the reason why in the Referral Note free-text field. For example, 'Residence visa application received. Please assess health case.'

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

Note: You can update the Visa Details and application identifiers of the health case while it's in an 'Awaiting Further Requirements' state where you are using the health case for a current application or referring it for another 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 additional information into this field that you would like regarding the assessment required. Refer to [SOP Update the visa details in a health case in IHS](#) and [FAQs – Visa Details in IHS](#)

When should I re-open an 'ASH' health case?

You will only need to re-open an ASH health case if the client's health condition has changed or if you need to have the health case re-assessed under different criteria (e.g. Residence instead of Temporary).

If the health case is auto-assessed as ASH, you will only need to re-open it if the client's health condition has changed.

If an auto-assessed health case outcome is ASH then the client has an acceptable standard of health which meets both temporary and residence health requirements. This is regardless of the visa application criteria which the health case was submitted under via eMedical (as shown in the Outcome History table for the assessment). The health case can be accepted for any temporary or residence application if the timeframe acceptance requirements of immigration instructions A4.20 and A4.25 are met.

The ASH auto-assessment outcome can be applied to your application (Temporary or Residence) without re-opening the health case if the medical is still valid and has not expired, and:

- the application you are lodging / assessing is the first application against the health case and was received within the 3 months medical expiry date.
- the health case has been assessed for a previous application (that was received within the 3 months expiry date) that has the same Visa Category /Referral and health requirements (GMC or LMC and /or CXR) as the new application.

Note: Remember to always 'claim' the health case for the new application you are lodging or assessing, even if you don't re-open it, by updating the visa details (AMS Client Id, Visa Application #, Visa Category, Visa Type, Length of Stay and Referral Type) in the Identifiers tab with the details of the new application.

If you are re-opening an auto-assessed ASH with Conditions health case, add the reason why in the Referral Note free-text field add the reason and what you want the HAT or MA to do next. This is instead of emailing the HAT.

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

When should I re-open an 'ASH with conditions' health case?

You will need to re-open an ASH with conditions health case if you need to have the health case assessed under different criteria (e.g. Residence instead of Temporary), if the client's health condition has changed or when the conditions in the health case need to be prescribed when a subsequent visa application is received.

The ASH with Conditions health outcome means that the client has an acceptable standard of health which meets temporary health immigration instructions only. In addition, the health case outcome can only be accepted as ASH for a temporary application submitted within three months of the medical completion date.

The ASH with conditions assessment outcome can be applied to your application without re-opening the health case if the medical is still valid and has not expired, and:

- the application you are lodging / assessing is the first application against the health case and was received within the 3 months medical expiry date and it is a Temporary visa.
- the health case has been assessed for a previous application (that was received within the 3 months expiry date) that has the same Visa Category (Temporary) /Referral and health requirements (GMC or LMC and /or CXR) as the new application.

If the health case is auto-assessed as ASH with Conditions, and you are lodging or assessing the first Temporary visa application for the health case (it is within the 3 month timeframe), then you can use the outcome for the application without re-opening the health case. Remember to 'claim' the health case for the application by updating the Visa Details.

If you are lodging or assessing a new Residence visa, you will need to re-open the ASH with Conditions health case (even if it has been auto-assessed) to have this reassessed under Residence criteria.

If you are lodging or assessing a subsequent visa application for a previous ASH with conditions health case, then you will need to re-open the health case so that the HAT can prescribe the tests and the Panel Physician can upload them.

Check with your TA or IM if you are unsure.

Note: Remember to always 'claim' the health case for the new application you are lodging or assessing, even if you don't re-open it, by updating the visa details (AMS Client Id, Visa Application #, Visa Category, Visa Type, Length of Stay and Referral Type) in the Identifiers tab with the details of the new application.

If you are re-opening an auto-assessed ASH with Conditions health case, add the reason why in the Referral Note free-text field. Refer to [SOP Update the visa details in a health case in IHS](#).

When should I re-open a 'Deferral' health case?

Deferrals will be treated like a Further Requirement for ASH With Conditions cases. The deferral conditions will need to be prescribed in IHS when the deferral period is up. The date for when the results are due are shown clearly in the health case e.g. 3 or 6 months. Refer to the latest assessment notes in the health case.

You will need to re-open a 'Deferral' health case when:

1. the conditions need to be prescribed after deferral time period is up so that the health case can be reassessed. This will prevent the clients from completing them beforehand.
2. the client may send the information to you directly. You can add the information as attachments when you re-open the health case.

In some cases the panel physician may contact ICC to re-open the health case so that they can add the tests directly.

Once the requirements have been received and the health case has been reassessed, then you can complete the processing of the visa application.

Do I always need to re-open a health case?

No, sometimes you will not need to re-open a previously assessed health case if the health case is still valid and has not expired:

- it has been auto-assessed as ASH and the application you are lodging or assessing is the first application against the health case and

was received within the 3 months medical expiry date. In this scenario, an auto-assessed health case is applicable as ASH for both

Temporary and Residence visas and ASH with Conditions for Temporary.

- it has been auto-assessed as ASH with Conditions and the application you are lodging or assessing is the first application against the health case and was received within the 3 months medical expiry date. In this scenario, an auto-assessed health case is applicable as ASH with Conditions for the Temporary visa. You will need to re-open the health case to have this re-assessed under Residence criteria.
- it has been assessed for a previous application (that was received within the 3 months expiry date) that has the same Visa Category and health requirements (GMC or LMC) as the new application.

Remember to check with your TA or IM if you are unsure.

Note: Remember to always 'claim' the health case for the new application you are lodging or assessing, even if you don't re-open it, by updating the visa details (AMS Client Id, Visa Application #, Visa Category, Visa Type, Length of Stay and Referral Type) in the Identifiers tab with the details of the new application Refer to [SOP Update the visa details in a health case in IHS](#).

Should I update the Visa Details when I don't re-open a health case?

If you decide that the health case does not need to be re-opened, then you should still update the visa details with the new application information so that this shows the link between the re-use of the health case and a new visa application. This action will 'claim' the health case for the application.

To 'claim' the health case for the new application you are lodging or assessing, even if you don't re-open it, update the visa details (AMS Client Id, Visa Application #, Visa Category, Visa Type, Length of Stay and Referral Type) as required. Refer to [SOP Update the visa details in a health case in IHS](#).

Note: Remember to always 'claim' the health case for the new application you are lodging or assessing, even if you don't re-open it, by updating the visa details (AMS Client Id, Visa Application #, Visa Category, Visa Type, Length of Stay and Referral Type) in the Identifiers tab with the details of the new application.
If you are re-opening an auto-assessed ASH health case, add the reason why in the Referral Note free-text field.
Refer to [SOP Update the visa details in a health case in IHS](#).

What happens to the health case once it's re-opened?

When a health case is re-opened, it will follow a 'system determined path'. This means that IHS will determine where the health case needs to go next based on the system rules.

A health case will always go back to the HAT in the first instance when it is re-opened (it will transition from an 'Assessed' to 'Manual Assessment' state).

The HAT will then determine whether they can assess the case or if it needs to be referred to a Medical Assessor.

If the client needs to provide any further information / tests for the new application, for example, to meet the 'ASH with conditions' or 'Deferral' requirements defined in IHS, then the HAT (or the MA if it is been referred to them) will prescribe any Further Requirements if required.

Note: The applicant will be notified that they require additional tests via a generic email where they have 'opted-in' to the INZ email notifications once the further requirements have been prescribed.
It is still the IOs responsibility to follow up with the applicant where further requirements are needed.

How do I reopen an 'Assessed' case?

The following training and guidance is available to help with the 'how to' of the new functions:

- [SOP Re-open a health case in IHS](#) (includes process map)
- [Re-open a Health Case training video](#)
- [IHS Manual: Re-open Health Case](#)

References

Refer to the following references in the [IHS and Health](#) of the Global Process Manual for further details:

[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](#)
[Client History Report](#)
[Communications to HAT](#)
[Recording Health Details in AMS](#)

See Also

- [FAQ](#)
- [FAQs - Visa Details in IHS](#)
- [FAQs - 'Auto-Assessed' health cases](#)
- [FAQs - Add attachments to a health case](#)
- [FAQs - Health deferrals in IHS](#)
- [FAQs - Paper medicals](#)
- [FAQs - Hold or Release a health case in IHS](#)

FAQs - Health deferrals in IHS

What are the changes to the process for a deferred medical decision?

With the changes to IHS in August 2018, the HAT will no longer prescribe the tests for a deferral as a deferral decision will now be recorded as an assessment outcome. The deferral conditions and length of the deferral are also recorded as part of the decision.

This change means that the health case will be in an 'Assessed' state instead of a 'Awaiting Further Requirements' state and the deferral conditions will no longer be prescribed in the IHS at the time the deferral decision is made. The information about the conditions can be viewed in the Case Summary tab (in IO standard view) and Medical Opinion tab (in Full View).

The HAT will still create an assessment note in IHS with the details of the deferral conditions so that the IO can follow up with the applicant. The HAT will also add a deferral health warning in AMS for the client.

As the case officer, you will still need to contact the client to advise them of the deferral, including what is specifically required and when it is required by. And follow up with the client to ensure that they submit the required tests by the end of the deferral period.

When the deferral tests (as defined by the conditions) are received, the case officer can now re-open the deferred health case and upload the tests as attachments so that the health case can be reassessed. This is instead of emailing the details to the HAT.

The client may also have their tests uploaded directly into eMedical when they do their exams instead of emailing them to INZ. (Note that the IO will need to reopen the health case for the HAT to prescribe the test before the Panel Physician can upload it).

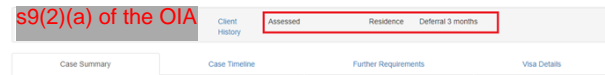
Why are some health decisions deferred?

Occasionally there may be instances where a Medical Assessor has recommended that we defer a decision on the status of a client's health (note that a deferral is only applicable in the case of a residence application as defined in [A4.55](#) of the INZ Operational Manual).

An example of where this may happen is where the client has active pulmonary TB (in which case a decision must be deferred for 6 months) or the Medical Assessor believes that a client's condition is treatable within 3 months as such that after that period they will have an Acceptable Standard of Health.

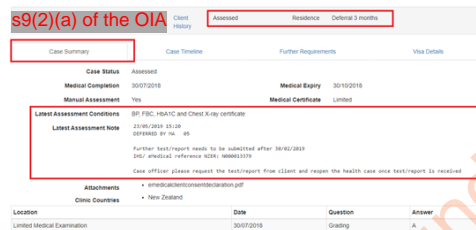
How do I identify if a medical decision is deferred for an applicant?

Where the medical opinion has been deferred for a client, this information will be reflected in IHS. The assessment outcome will be displayed in IHS as Assessed Residence Deferral 3 months in the health case status bar (this is the grey banner at the top of the health case screen).



Another way to view the assessment outcome is shown below - the Assessed Residence Deferral 3 Months outcome will be displayed in the health case status bar.

Under the Case Summary tab, the Latest Assessment Note will display the date of when the latest note was updated by the HAT and the Latest Assessment Conditions will specify the required tests that the client must submit after the deferral time frame (this is shown in the health case status bar). Please double check that you have the correct client in IHS before sending out any further information request letter.



How do I identify if a medical decision is deferred in IHS?

With the changes to IHS in August 2018, a deferred health decision is now recorded as a health assessment outcome. The health case will therefore be in an 'Assessed' state.

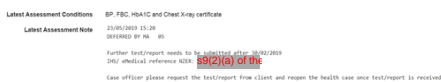
You can identify if a medical opinion has been deferred by a Medical Assessor if the health case in IHS has a status of 'Assessed Deferral'.

A deferral decision will be clearly displayed in the health case banner like this:



In the 'Case Summary' tab, check 'Latest Assessment Note'. The last assessment note in the health case will advise if the medical opinion has been deferred for a client.

A typical deferral note in IHS will look similar to this:



The 'Case Summary' tab will show all the details of the deferral:

- the 'Case Status' will be 'Assessed' and will display the 'Deferral' outcome along with the length of the deferral (3 or 6 months) and the Visa Category the decision is applicable for (Residence only)
- the 'Latest Assessment Conditions' will advise the conditions of the deferral
- the 'Latest Assessment Note' will provide the details of what is specifically required and when it is required by.

s9(2)(a) of the OIA

| Client Name | Assessment | Residence | Deferral 3 months |
|------------------------------|--|----------------------|-------------------|
| Case Summary | Case Timeline | Further Requirements | Visa Details |
| Case Status | Assessed | Medical Expiry | 30/10/2016 |
| Medical Completion | 30/07/2016 | Medical Certificate | Limited |
| Manual Assessment | Yes | | |
| Latest Assessment Conditions | s9(2)(a) of the OIA and Check A-way certificate Issued on 30/07/2016 Issued by Mr. M. Further test/report needs to be submitted after 30/07/2016 (eMedical reference code: s9(2)(a)) Case officer please request the test/report from client and re-open the health case once test/report is received | | |
| Attachments | Attachments Clinic Countries: New Zealand | | |
| Location | Date | Question | Answer |
| Limited Medical Examination | 30/07/2016 | Grading | A |

What do I do with a deferred medical decision?

After you have checked all the details in the Case Summary tab including the latest assessment notes, you can communicate what is required to the client appropriately.

Contact the client about the decision

When the health case decision has been deferred as per A4.55⁶⁷ of the INZ Operational Manual based on the advice of a Medical Assessor, you will need to contact the client to inform them of the deferral decision and ask them to submit the additional information required after the deferral period so that their health case can be reassessed.

Request the tests from the client, explaining the case has been deferred and further tests are required in 3 or 6 months (the timeframe will be as defined in the Deferral Outcome).

AMS Health Details

You will not be able to complete the recording of the Health Details for the client's application until the deferral period is completed and the client has provided the additional information so that the health case can be assessed. You can record the details of the deferral decision as a Health Note in AMS.

Note: You will not be able to determine and finalise the visa application in AMS until the additional information has been received after the deferral period is submitted (this can be 3 or 6 months) and the health case is reassessed in IHS.

Follow up with the client

After communicating what is required to the client, track the deferral period of the health case for the client's application. Follow up with the client as required.

If there is no additional information submitted after the deferral period, contact the client to submit the information so that the health case can be re-assessed, and re-open the health case with the re-open reason of 'Disputing/deferral information received'. This will enable the HAT to prescribe the required information in IHS.

Re-open the health case when you receive the additional information

If you receive the additional information from client or clinic directly, you can re-open the health case using the re-open reason of 'Disputing/deferral information received' and upload the received information into it as attachments. This step is mandatory if you have received the deferral information from the client.

What happens next

The re-opened health case will be sent to the HAT for a manual assessment.

The HAT will review the health case and update the notes in AMS and IHS regarding the deferral when the additional information has been received. Alternatively, the HAT will prescribe the required information to be submitted via eMedical by an INZ Panel Clinic if no further information were received and attached at the time of re-opening the health case.

The HAT will refer the health case to the Medical Assessor (MA) if required for reassessment. (Note that HAT will only refer the health case to a MA if all required information has been received).

Track the assessment of the health case as you do currently via the Health Status Report or directly within the IHS system as required.

What is the process for a health decision deferral in IHS?

When to use

Use this process when the health case in the Immigration Health System (IHS) has been deferred as per A4.55⁶⁷ of the INZ Operational Manual.

Role

Immigration Officer

Prerequisites

- There is an AMS warning for your client advising the health assessment for the Residence visa is deferred for a period of time.
- The health case in IHS is in a state of 'Assessed Residence Referral'.

Steps

- Check the health case status in IHS.
- Re-open the health case in IHS by selecting the re-open reason of 'Disputing/deferral information received' and click the 'Case Summary' tab.
- Check the 'Assessment Outcome' (which will show the deferral period), the 'Latest Assessment Conditions' and 'Latest Assessment Note' for details of the deferral requirements and conditions.

s9(2)(a) of the OIA

| Client Name | Assessment | Residence | Deferral 3 months |
|------------------------------|--|----------------------|-------------------|
| Case Summary | Case Timeline | Further Requirements | Visa Details |
| Case Status | Assessed | Medical Expiry | 30/10/2016 |
| Medical Completion | 30/07/2016 | Medical Certificate | Limited |
| Manual Assessment | Yes | | |
| Latest Assessment Conditions | s9(2)(a) of the OIA and Check A-way certificate Issued on 30/07/2016 Issued by Mr. M. Further test/report needs to be submitted after 30/07/2016 (eMedical reference code: s9(2)(a)) Case officer please request the test/report from client and re-open the health case once test/report is received | | |
| Attachments | Attachments Clinic Countries: New Zealand | | |
| Location | Date | Question | Answer |
| Limited Medical Examination | 30/07/2016 | Grading | A |

- Update the AMS Health Details for the client's application that the health case has been deferred for, adding an AMS Note against the application. Refer to [SOP Recording Health Details in AMS](#).
- Request the required tests from the client, explaining that the health case has been deferred and further tests are required in 3 or 6 months (the timeframe is defined within the 'Assessment Outcome' field).
- Follow up with the client to ensure they undertake the requested tests. Preferably, get the client to submit the tests via an eMedical panel physician, you MUST reopen the health case in IHS to enable this.
- If you receive the information directly from the client, and the health case is still closed (finalised as deferral in IHS), re-open the health case and upload the tests as attachments to trigger a reassessment. The health case will go back to the HAT for processing.
- 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.

Process ends.

Refer also to [SOPs Check the Health Assessment Outcome in IHS](#) and [Re-open a health case in IHS](#).

See Also

[FAQ](#)

[FAQs - Visa Details in IHS](#)

[FAQs - 'Auto-Assessed' health cases](#)

[FAQs - Add attachments to a health case](#)

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

[FAQs - Paper medicals](#)

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

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FAQs - Paper medicals

What if a client has submitted a new paper medical for their application?

As not all countries and clinics have approved INZ panel physicians or are eMedical-enabled, some applicants will still be required to submit the INZ paper-based medical certificates with their applications. Also, customers in countries without panel physicians must use a local registered or board-certified or licensed medical practitioner.

Any non-eMedical enabled physicians are required to send the completed medical certificates directly to INZ. All these documents should be scanned into PDF format by the physician and sent via email to inzhealth@mbie.govt.nz. They will then be uploaded in the Immigration Health System (IHS).

However, some applicants send in their medicals directly to INZ with their application (for example RSE applications). If you receive any paper medicals with an application, then the preferred method is to scan the medical certificates, radiologist report and associated blood test results as a PDF and send to the HAT via HAT@mbie.govt.nz so they can be uploaded into IHS.

Note: Only new medicals by physicians who don't have eMedical are to be sent to the HAT for uploading into IHS. Any old paper medicals that expire around June 2018 and medsonline medicals are not uploaded into IHS.

How do I find out which countries do not have eMedical clinics?

A non-eMedical enabled clinic is one that cannot access eMedical and therefore submits paper medical certificates instead.

Refer to the INZ website for details on [what to do for countries without eMedical panel physicians](#).

For a [current list of eMedical panel physicians and clinics](#), refer to the list of countries readily available on the INZ website.

What do I need to do when I receive a paper medical with an application?

As the immigration officer responsible for the visa application assessment, if you receive a new paper medical from the applicant as part of their application, before sending the paper medicals to HAT for uploading to IHS, you must first ensure that it meets the INZ requirements for the application.

A paper medical will not be accepted by INZ without a reason why it has been provided on paper instead of submitted via eMedical.

- If the medical is from an approved panel physician that has no eMedical capability, then this is an acceptable reason for submitting a paper medical.
- If the medical is from an approved panel physician that has eMedical, then the panel physician will have needed prior approval to provide a paper medical instead.

Note: If the panel physician has eMedical available but the client has provided a paper medical, they must provide the permission from INZ to applicant with the paper medical so both can be submitted. If the permission is not provided to the client, then the medical is not acceptable.

If the medical is not acceptable, (e.g. no reason or prior permission can be provided), you should normally RFL the whole application include the medical and advise the client that it is not acceptable, the medical must be submitted via eMedical. You can either RFL the whole application including the paper medical or return the paper medical back to the client, advising them to submit the medicals via eMedical. Do not email the paper medicals to the HAT in this case.

When you have checked that the medical meets the INZ requirements, there are no identity concerns or concerns about the physician, then you can send the medical information to the HAT.

Scan the paper medical certificate as a PDF (preferred format) and send it to the HAT via email to HAT@mbie.govt.nz.

Remember to include the heading "PAPER MEDICALS" within the subject line of your email along with the application and client's information within the body of email. Complete the details required in the email using the table format as described in the [SOP Sending communications to HAT](#).

Once the paper medical is loaded into IHS, it will have an NZHR and NZER number. You will then be able to record the NZHR and NZER as part of the Health Details for the application in AMS. Refer to [SOP Recording Health Details in AMS](#) for details on how to do this.

Where do I send the hardcopy medicals if I receive them for an application?

Any new paper-based medicals received by INZ must be sent to the HAT team to be uploaded into IHS.

If you receive any hardcopy medical information that can't be scanned, then send with a covering note to the HAT via internal mail to:

Courier Address: c/- DX Mail EP71514, 20 Fairfax Avenue, Penrose, Auckland 1061, New Zealand

Postal Address: PO Box 76895, Manukau Auckland 2241.

Sometimes, if the x-ray report is abnormal then the HAT would need the actual film or CD (HAT will request this). The physician should then send the medical information direct to the HAT via:

Courier Address: c/- DX Mail EP71514, 20 Fairfax Avenue, Penrose, Auckland 1061, New Zealand

Postal Address: PO Box 76895, Manukau Auckland 2241.

What happens when a client is applying for Recognised Seasonal Employer (RSE) Work Visa?

If a client is applying for a Recognised Seasonal Employer (RSE) Limited Visa, they'll need to have a chest x-ray no matter how long they are staying in New Zealand.¹

The panel physician will have provided the completed medical certificate directly to the client when they stated they were applying for a RSE Work Visa. This is because RSE visa applications require a short turnaround time, and applicants must submit their completed medical certificate together with their application to INZ to avoid delays.²

Most RSE countries are eMedical enabled, so the medical certificates for RSE workers will be submitted electronically through eMedical.³

However, in some cases, RSE applications are from non-eMedical enabled countries so paper medicals are provided with the application. The INZ processing office will receive these paper medicals with the applications to enable fast processing. The medicals need to be forwarded to the HAT to be assessed by a Medical Assessor.

Non eMedical enabled clinics (Submission of paper medical certificates) If you receive a paper medical for a RSE visa application, scan the medical certificate as a PDF format and send it to the HAT via email at HAT@mbie.govt.nz (preferable method). Remember to include the heading "RSE" within the subject line of your email along with the application number and client's information within the body of email. Complete the details required in the email using the table format as described in the [SOP Sending communications to HAT](#).

Or alternately send the hardcopy medical certificate via internal mail with a covering note to the HAT:

DX Mail
EP71514
20 Fairfax Avenue

If you have questions over any medicals provided you should contact the HAT for advice.

What happens when INZ receives the paper medical certificate?

All paper medical certificates need to be received by the HAT so they can be uploaded into the Immigration Health System (IHS). When the HAT receives the scanned copy of a paper medical certificate, they will upload it directly to IHS to create a health case. If the HAT receives the hardcopy of a medical certificate, they will digitise the certificate and then upload it into IHS.

Note: Only new medicals sent to HAT by physicians who don't have eMedical will be uploaded into IHS. Any old paper medicals that expire around June 2018 and medsonline medicals are not uploaded into IHS.

Once the HAT has created the health case, you will be able to find it in IHS. The medical certificate will have a NZHR and NZER health case reference number (this is the IHS specific health case reference number). See the [IHS and Health](#) in the Global Process Manual for more details.

You will then be able to record the NZHR and NZER as part of the Health Details for the application in AMS. Refer to [SOP Recording Health Details in AMS](#).

The HAT will assess the medical certificate and provide an outcome in IHS. If there is information missing from the medical certificate, the HAT will usually update the health case and request further information if required in IHS. This will advise the Panel Physician to complete the health case in eMedical. In some cases, HAT may deem it necessary to ask the Immigration Health Team (IHT) to contact the clinic directly.

If the client needs to be contacted, you as the Immigration Officer (IO) will be required to do this. HAT will advise you if this is the case.

Sometimes, if the x-ray report is abnormal then the HAT would need the actual film or CD (HAT will request this). The physician should then send the medical information direct to the HAT via:

Courier Address: c/- DX Mail EP71514, 20 Fairfax Avenue Penrose, Auckland 1061, New Zealand

Postal Address: PO Box 76895, Manukau Auckland 2241.

Note: It is the IO's responsibility to check for the updates on the health case and then Non eMedical enabled clinics (Submission of paper medical certificates) record the health outcome in the applicant's application in AMS. Refer to the SOPs Checking Medical Certificates in IHS, Check the Health Assessment Outcome in IHS, and Recording Health Details in AMS for details on how to do this.

¹ Source: <https://www.immigration.govt.nz/new-zealand-visas/apply-for-a-visa/tools-and-information/medical-info/when-you-need-an-x-ray-or-medical-examination>

² Source: <https://www.immigration.govt.nz/assist-migrants-and-students/other-industry-partners/medical-professionals/non-medical-physicians>

³ Source: [Non eMedical enabled clinics \(Submission of paper medical certificates\)](#)

⁴ Source: [Non eMedical enabled clinics \(Submission of paper medical certificates\)](#)

⁵ Source: [Non eMedical enabled clinics \(Submission of paper medical certificates\)](#)

See Also

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

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FAQs - Hold or Release a health case in IHS

There is functionality in IHS for an IO user to put a health case on hold or release it from hold.

Can I put a health case on 'Hold'?

Applicable for IO users

Yes, you can put a health case on hold in IHS. A health case can only be put on hold by a user when it is in the 'Manual Assessment' state.

You will need to enter or update the Visa Details in the 'Identifiers' tab of the health case first, then select the 'Hold' button.

When you put a health case on hold, you will need to select a reason from the selection available in the drop-down list:

- 'Manual Assessment held pending information from IO'
- 'Manual Assessment held pending ID resolution'
- 'Medical Opinion held pending visa application acceptance'.

Note: IO users will be able to see the Hold button in Restricted (standard IO view) or Full View modes. Refer to [SOP Put a health case on hold in IHS](#).

Who can put a health case on hold?

Both HAT and IO users in IHS can put a health case on hold.

The most likely scenario is that the HAT will put a case on hold, and the IO will release from hold.

What are the reasons a health case can be put on hold?

When you put a health case on hold, you will need to select a reason from the selection available in the drop-down list. The three reasons that can be selected are:

- 'Manual Assessment held pending information from IO'
- 'Manual Assessment held pending ID resolution'
- 'Medical Opinion held pending visa application acceptance'.

Note: 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.

Why would a health case be put on hold?

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.

A health case may be put on hold by the HAT if there are identity concerns that need to be resolved by the IO before the health case can be assessed.

A health case may be put on hold by the IO if there are concerns about the applicant or the application that are not health related that need to be resolved by the IO before the health case can be assessed.

For example, if the health case needs to wait until the visa application is accepted before a health assessment can proceed, then place it on hold with the reason 'Medical Opinion held pending visa application acceptance'.

If the health case needs to wait until the information is received from the IO (such as a declaration) before a health assessment can proceed, then place it on hold with the reason 'Manual Assessment held pending information from IO'.

If the health case needs to wait for the IO to resolve the client identity concern before a health assessment can proceed, then place it on hold with the reason 'Manual Assessment held pending ID resolution'.

What happens to the health case once it's on hold?

When a health case is on hold, it means it is waiting for additional information before it can be assessed so the health case will stay on hold until this information is received / the issues are resolved and the IO releases it from on hold, or the system determines that the health case has been on hold for the maximum period of time and releases it.

If a health case is still on hold after the maximum period of time (currently set to 365 days), the system will release it from hold and automatically change its status to 'Assessed - Incomplete'. The maximum days is configurable by the IHS System Admin and therefore may change from time to time.

Can I add attachments when a health case is on hold?

Yes, you can add attachments directly into the health case while it is on hold but only if the Hold Reason is 'Manual Assessment held pending information from IO'. This is best done just before you release it from hold.

You cannot add attachments to a health case if the Hold Reason is 'Medical Opinion held pending visa acceptance'.

Refer to [FAQs - Add attachments to a health case](#).

Can I release a health case from on 'Hold'?

Applicable for IO and HAT users

Yes, you can release a health case from hold.

You will need to ensure that the Visa Details and AMS application identifiers of the health case are all present and correct, else you will need to update them, before the health case can be released from hold. Refer to [SOP Update the visa details in a health case in IHS](#) and [FAQs - Visa Details in IHS](#).

When you update the Visa Details and AMS application identifiers, remember to add in some details into the 'Referral Note' field for why you are releasing the case from hold and what you need to 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. This is instead of emailing the HAT.

After you have updated the Visa Details, select 'Save'. The 'Release' button will then be enabled. Click the 'Release' button to take the health case off hold.

Note: If you need to upload any attachments, ensure you do this before you release the health case from on hold. Refer to [SOPs Release a health case from on hold in IHS](#) and [FAQs - Add attachments to a health case](#).

Why would I release a health case that is on hold?

A health case would be released from hold when the reason for the hold is no longer valid and all the further actions have been completed or the further information requested has now been received, so that the health case can now be assessed.

What happens to the health case once it's released?

When a health case is released from hold, the health case will follow a 'system determined path'. This means that IHS will determine where the health case needs to go next as defined by the hold rules.

- When manually released from on hold, the health case will transition from a 'Hold' state to either 'Manual Assessment' or 'Medical Opinion', and be put it back into an IHS workflow queue to proceed with the health assessment process. The hold reason will indicate where the health case will go next and what state it will be when released:
- If the hold reason is 'Manual Assessment held pending information from ID', when released the health case will go back to the 'Manual Assessment' state and be put in the HAT workflow queue.
- If the hold reason is 'Medical Opinion held pending visa application acceptance', the health case will go to the 'Medical Opinion' state and be put in the Medical Assessor queue.
- If the hold reason is 'Manual Assessment held pending ID resolution', when released the health case will go back to the 'Manual Assessment' state and be put in the HAT workflow queue.

For those health cases that are automatically released by the system (define by the maximum days on hold), they will transition from a Hold' to an 'Assessed - Incomplete' state.

Important Note: Although the 'Hold' reason provides some information as to why the health case was on hold, so that the health case can be processed more efficiently, please add details into the 'Referral Note' field when you update the Visa Details in the Identifiers' tab for why you are releasing the case from hold. Enter any information you would like to advise the HAT or MA regarding the assessment required and what you need them to do with the health case next. This is instead of emailing the HAT.

What is the difference between the 'Hold' state and 'Awaiting Further Requirements' state?

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, waiting for the applicant to lodge the visa application before proceeding with the health assessment.

References

The following training and guidance in the [IHS and Health section](#) of the Global Process Manual is available to help with the 'how to' of the new functions:

- [SOP Put a health case on hold in IHS](#)
- [SOP Release a health case from on hold in IHS](#)
- [SOP Update the visa details in a health case in IHS](#)
- [FAQs - Add attachments to a health case](#)
- [FAQs - Visa Details in IHS](#)

Also refer to:

- [Training video: Hold and Release a health case in IHS](#)
- [IHS Manual: Hold and Release](#)

See Also

- [FAQ](#)
- [FAQs - Visa Details in IHS](#)
- [FAQs - 'Auto-Assessed' health cases](#)
- [FAQs - Add attachments to a health case](#)
- [FAQs - Re-opening health cases in IHS](#)
- [FAQs - Health deferrals in IHS](#)
- [FAQs - Paper medicals](#)

Released under the Official Information Act 1982

Health Case States

This video covers:

- what each IHS health case state means;
- current health case state transitions;
- new transition pathways, and a new 'Hold' state, that will be implemented in August.
- 8 minutes duration.

Click [here](#) to view the video.

See Also

- [IHS Training Videos](#)
- [Health Case Tabs](#)
- [Search for a Health Case in IHS](#)
- [MA Assignment – HAT only](#)

Released under the Official Information Act 1982

Health Case Tabs

This video covers:

- the information displayed on the default health case tabs of Case Summary, Case Timeline and Further Requirements.
- Note these tabs will have some changes following the IHS August release.
- 13 minutes duration.

Click [here](#) to view the video.

See Also

- [IHS Training Videos](#)
- [Health Case States](#)
- [Search for a Health Case in IHS](#)
- [MA Assignment – HAT only](#)

Released under the Official Information Act 1982

Search for a Health Case in IHS

This video covers:

- how to search for a health case in IHS.
- 3 minutes duration.

Click [here](#) to view the video.

See Also

- [IHS Training Videos](#)
- [Health Case States](#)
- [Health Case Tabs](#)
- [MA Assignment – HAT only](#)

Released under the Official Information Act 1982

MA Assignment – HAT only

This video covers:

- functionality to assign, re-assign and unassign a health case.
- 10 minutes duration.

Click [here](#) to view the video.

See Also

[IHS Training Videos](#)

[Health Case States](#)

[Health Case Tabs](#)

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

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