### SECTION SIX: CLINICAL USER GUIDES





## Key Clinical Guidelines and Tips

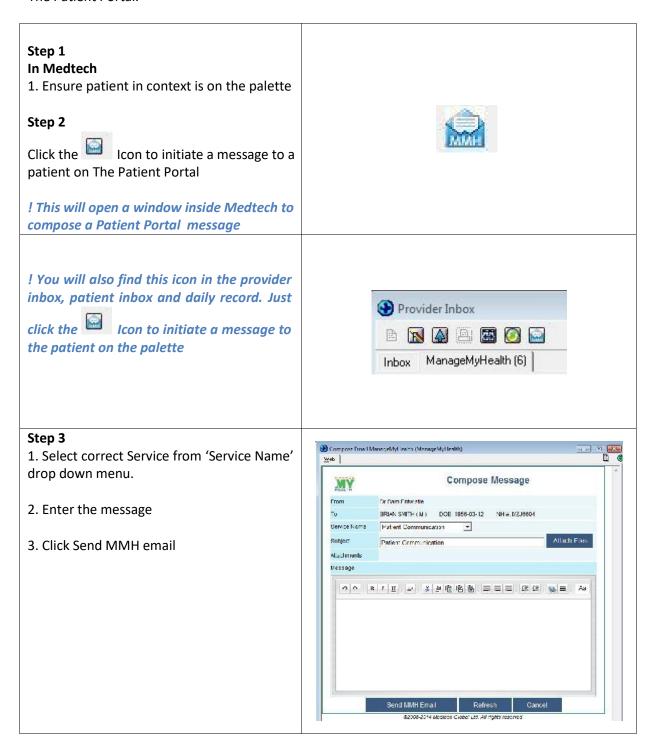
This guide provides you with key clinical guidelines and tips for your use of the Patient Portal.

| Patient Portal Icon Guide   |  |
|---|--|
|   | Patient is registered and activated for the Patient and may also be registered for one or more of Medic Alert, Beating the Blues  Patient is registered but not yet activated  Patient is not registered  Send the Patient an email  |
| Secure Messaging Tips   | Ask your patient to send you a secure message in x number of days following a medication change or to let you know how they are getting on following a recent consult.   |
|   | Health Goals - BP monitoring – patients can send you details of their BP results using the attachment in the secure message.   |
|   | Rather than send abnormal results to the nurse to follow up with the patient, send the patient a secure message such as 'your results are back, please make an appointment to see me'. You are also able to transpose a result into an email and add your instructions.  |
|   | If your response to a patients email is more than 3-4 sentences, or their request is too complex ask the patient to make an appointment to see you face to face.   |
| Don't file a significant result until you have contacted the patient  | If you have a result that is very significant, then do not file it or add a classification until you have contacted the patient. As an alternative tick the 'Do not upload to MMH' button. Once you file the result it will be viewable by the patient. If you do file it by accident, you can tick the 'do not upload to MMH' OR the 'confidential' tick box and then 'file' again. This will remove it from the patients view. |
| Don't file a significant result or letter from an external provider until you are aware the patient has been informed | If you have a result or letter from an external provider and you are not sure if the patient has been informed of the outcome, then do not file it or add a classification until you are aware the patient has been informed. Refer to the options above to manage the result  |

| Comment on abnormal lab results                             | Patients go online to find their results. They do not send emails asking about red "A" abnormal results as long as the GP has made a comment in the result. For example, an e-GFR may be mildly abnormal, but write "kidneys fine' in the result and patient will get the message.   |
|---|--|
| Have clear expectations about anticoagulation               | If you use Patient Portal for advising INRs and warfarin doses make sure you have agreement that this is what you will do. A standard phrase can be useful. E.g., 'INR 2.4: On4mg, continue 4 mg, test 1 month.  |
| Patient Portal Status on Inbox Records                      | The Patient Portal green icon is displayed next to the comment field on each inbox record,   |
| Follow- up on emails/test results                           | It remains the practice/clinician responsibility to follow up on any communications that you have sent to patients that require a response. Add a task (lightbulb) as a reminder to check for responses from patients. You are also able to view unread messages by going to your sent items in your inbox in the patient portal. If the envelope is closed, the patient has not yet opened the secure message   |
| Make regular prn meds long term                             | Repeat prescriptions are a very useful part of the platform, saving nurse or receptionist time taking a message. Patients can only order medications ticked 'long-term' It is worthwhile keeping regular prn medications as long-term so patients can order them.  |
| Consult note viewing  | Research has shown that patients having access to their consult notes is appreciated by patients and in many instances enable them to have better understanding of their health and adherence to medications. This can apply form the Go Live date or when a patient registers thereafter.   |
| Patients may spot errors in the record                      | Patients may well send you information asking to update allergies or medications if they think there is an error or omission. This is a useful quality control measure.  |
| Impact on daily workflow is not onerous for most clinicians | So far, experience suggests that online services can be managed within the normal daily workflow, where you manage requests at the same time you would any other incoming mail. Unless you are providing a large e-consult or triage service then it would not seem necessary to have separate time. On the whole this should be a time saver by reducing the need for calls to the patient. A secure email is faster and less at risk of 'capture' by the patient for other issues. |

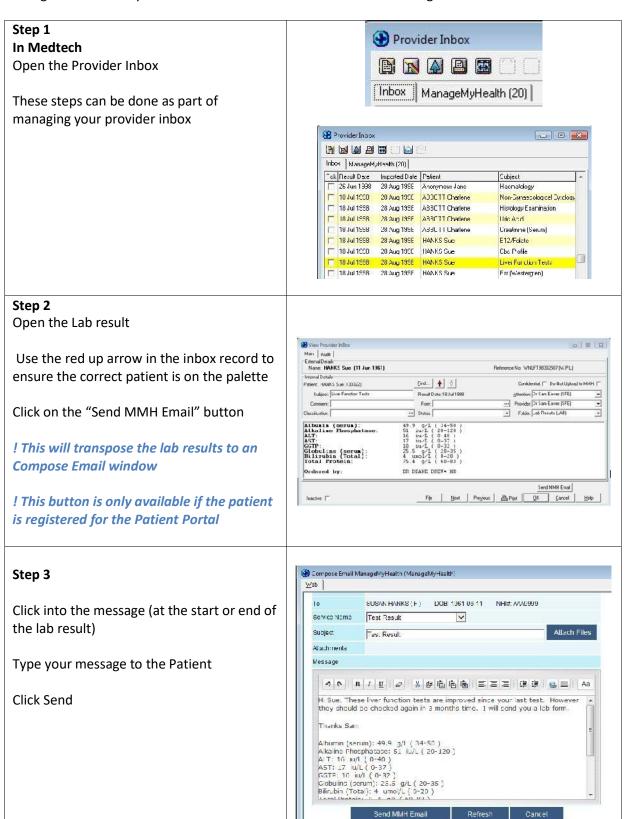
### Initiate sending a secure message to a patient

This guide will show you the different ways you can initiate a secure patient message to a patient on The Patient Portal.



### Sending a lab result with a secure message

This guide will show you how to send a lab result with a secure message from the Provider Inbox.



### Receiving and Replying to Secure Messages

This guide shows you how to check your Patient Portal messages and reply to patients using secure messaging.

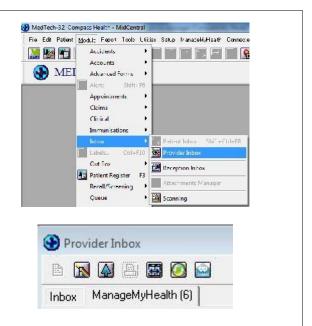
All Patient Portal messages are saved in the patient's daily record and patient's inbox (MMH tab)

#### Step 1

- 1. In Medtech: Navigate to your provider Inbox
- 2. Click on the ManageMyHealth tab

! You will receive a notification message in your provider inbox in Medtech when you have been sent an e-service message from The Patient Portal. You will find the message in the ManageMyHealth™ tab in the Provider Inbox.

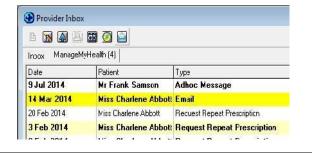
! The number next to this inbox name is the number of new (unread) messages you have in this inbox



#### Step 2

Open the Message

! The patient message will only be sent to the provider listed as the recipient in the service setup.



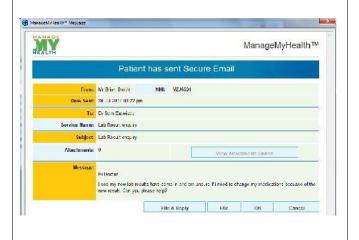
#### Step 3

The full message will appear and give you the option to:

- a. **File & Reply** *File the message in the* patients' inbox and reply to the message from the Patient Portal
- b. File File the message in the patients' inbox
- c. **OK** Do not file the message but will be marked as read
- d. Cancel

#### Select the appropriate action

! You must be registered and activated for the Patient Portal to respond to Messages

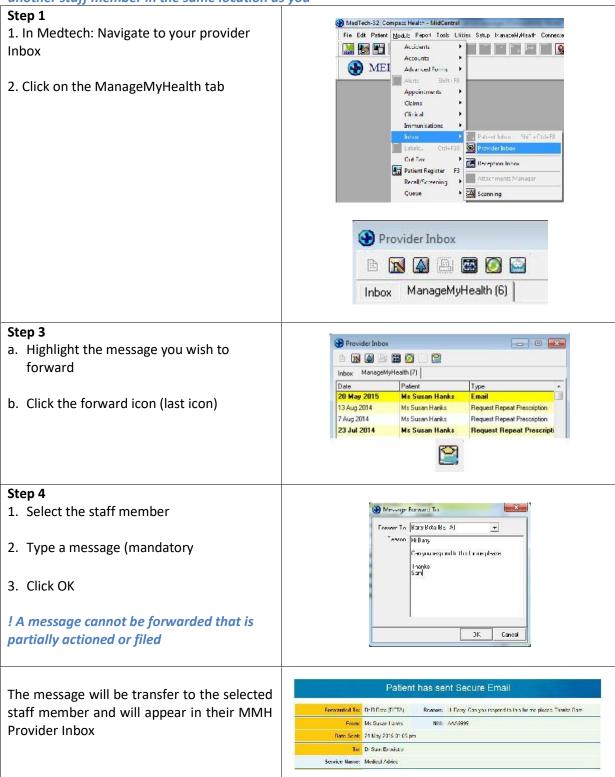


#### Step 4 Reply Indox Sent Trash Braits(1) Settings ! If you select 'File & Reply', you will be ↑ Back to Inbox ← Back to Message ✓ Send Message ☑ Save as Draff taken to the Patient Portal to respond to BRIAN, SMITH M 58 Vrs DOB:12 Mar 1956 NHI#: MZJ6804 the message TO HHIANSMITH 0 Enter your e-mail response into the message Service Type Lab Result enquiry body Subject Re Lab Result enquiry Attachmenta Step 5 1. Select a request status. 2. Click Send Message ! This status will only display if there is a fee for this service. The item will not be billed automatically; you will need to complete this within Medtech if a cost is involved.

### Forwarding Secure Messages

This guide will show you how to forward The Patient Portal secure messages to another staff member. This can be done for both emails and repeat prescriptions.

! If your practice has multiple locations in Medtech32, you are only able to forward a message to another staff member in the same location as you

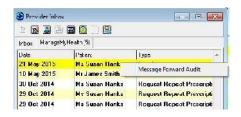


Audit information is available for each forwarded message

#### Step 1

- 1. Right mouse click on the forwarded message
- 2. Select Message Forward Audit

! The audit information will be displayed



### Receiving Repeat Prescription Messages

This guide shows you how to check your Patient Portal repeat prescription messages and accept or decline these messages using secure messaging.

#### Step 1 1. In Medtech: Navigate to the provider Inbox MedTech-32 Compass Health - MidCentral File Edit Patient Modula Feport Tools Utities Satup transceMyHaarth Connecte 2. Click on the ManageMyHealth tab M 💯 🛅 🛚 Accidents • Accounts MEI Advanced Forms ! Make sure you are in the provider inbox Appointments Claims of the provider who has been setup to Clinical receive these repeat prescription Immunisations messages else you will need to filter the Cut Box inbox Reception Inhox Patient Register F3 Attachments Managal Recall/Screening Scanning Provider Inbox ! The number next to this inbox name is the number of new messages you have in this inbox ManageMyHealth (6) Inbox Step 2 1. Double Click to open the Message Provider Inbox Inbox ManageMyHealth (26) ! Click the blue up arrow to put this Date Patient patient on the palette and view their 11 Jun 2015 Mr Gary Daintiff Request Repeat Prescripti clinical notes 11 Jun 2015 Mr Gary Daintiff Request Repeat Prescripti 11 Jun 2015 Ms Susan Hanks Request Repeat Prescripti



- 1. Click Approve All
- 2. Click to add a note to the patient against an individual medication if required
- 3. Click File
- 4. The patient will receive a notification message

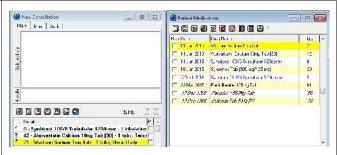
! The message also displays other information i.e. date of last consultation, date last prescribed, any note from the patient. Comments from the patient will



in the Attn. column

The medications will be repeated and appear in the new consultation screen ready for printing or changing the provider details as required





#### **To Reject All Medications**

- 1. Click Reject All
- 2. Enter a note to Patient (mandatory field for rejections)
- 3. Click File

! The patient will receive a notification message in their email with further information displayed in the activities section of the their home page on the Patient Portal



#### To Approve or reject individual medications

- 1. Click the radio button to approve or reject individual medications
- 2. Enter a note to patient under the rejected medications (mandatory)
- 3. Click File
- 4. The approved medication will be prescribed

The patient will receive a notification message advising of the number of medications that have been approved, rejected, or still to be actioned.

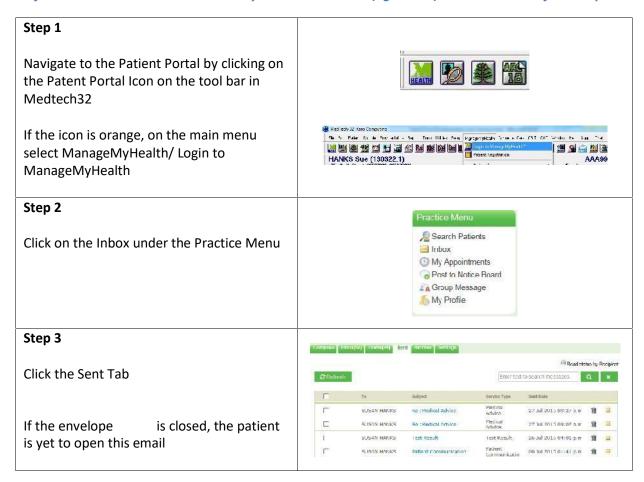


### Message Read / Receipt Status

You are able to view if the patient has opened a secure message that you have sent. This applies to both patients and practice staff

! This feature only applies to secure messages. It does not apply to comments in filed lab results

! It remains the practice's responsibility to ensure that patients have received important information. It is recommended that you also add a task (light bulb) as a reminder to follow-up

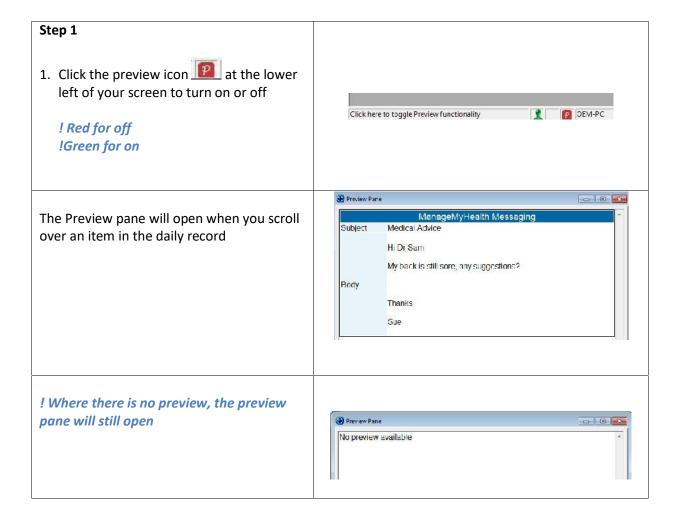


#### Preview Pane

This guide will demonstrate how to setup and use the preview pane to view the body of messages without opening the item

The preview pane is available for The Patient Portal Messages and SMS messages

The preview pane can be switched on or off and will remember the screen position and size



### Witholding Particular Items from the Patient Portal

It is possible to withold specific items from a patient record so that they are not included in the patient's Health Summary on the The Patient Portal. Items that can be withheld are:

- 1. Consultation Notes
- 2. Classifications
- 3. Medications
- 4. Inbox Items
- 5. Recalls and Vaccines

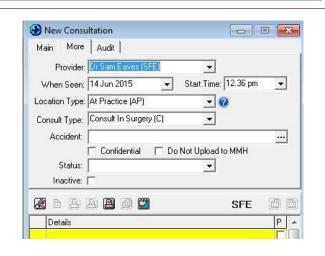
Items can be withheld at any time; either when it is first entered, or after it has been entered. For items that are withheld at a time after they are first entered, the item entry will be removed from the patient's Health Summary on the Patient Portal at the next data synchronisation (approximately every 15minutes but is configurable at each practice)

! Records marked as confidential will be withheld automatically from the Patient Portal.

#### Witholding a Consultation note

- 1. Open the Patients consultation note
- 2. Select the More Tab
- 3 . Select the 'Do Not Upload To MMH' check box.

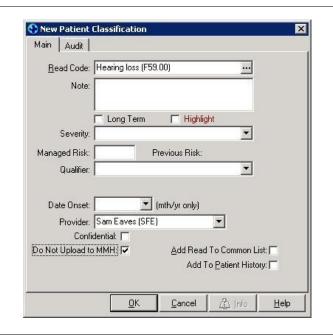
! This consultation note will now be withheld from the Patient Portal.



#### Witholding Classifications

- 1. Open either the New Patient Classification (NPC) or View Patient Classification (VPC) dialog for the classification to be witheld from The Patient Portal
- 2. Select the 'Do Not Upload To MMH' check box.
- 3. Complete the remainder of the NPC or VPC dialog as needed.
- 4. Select OK.

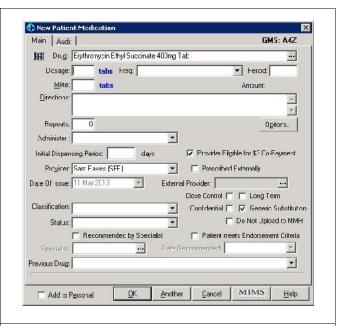
! The classification will now be withheld from the Patient Portal.



#### **Witholding Medications**

- Open the New Patient Medicine (NPM) or View Patient Medicine (VPM) dialog for the medication to be witheld from The Patient Portal.
- Select the 'Do Not Upload to MMH' checkbox.
- 3. Complete the remainder of the NPC or VPC dialog as needed.
- 4. Select OK.

! The medicine will now be withheld from the Patient Portal. .

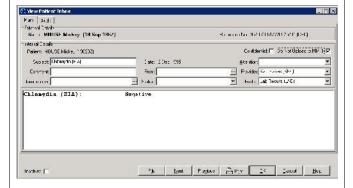


#### Witholding Inbox Items

- Open the New Patient Inbox (NPI) or View Patient Inbox (VPI) dialog for the inbox item to be witheld from The Patient Portal.
- Select the 'Do Not Upload to MMH' checkbox.
- 3. Complete the remainder of the NPI or VPI dialog as needed.
- 4. Select OK.

! The inbox item will be withheld from the Patient Portal

! Only items filed in the LAB and RSD Inbox folders are included in the Patient Portal at this time.



# Witholding Recalls/Screening and Vaccine Terms for individual patients

- 1. Open the Screen
- 2. Select the 'Do Not Upload to MMH' checkbox.
- 3. Complete the remainder of the NPI or VPI dialog as needed.
- 4. Select OK

#### Provider Guide

### Provider Guide

### FAG

#### Q: How do I Login to MMH?

MedTech and ManageMyHealth™ support a common single sign on, meaning if you are logged into MedTech, you are automatically logged into ManageMyHealth™.

#### O: How do I know the patient on the palette is using MMH?

When you have a patient in context, you can see if a patient has a MMH record by the colour of the MMH icon on your toolbar.

When the button is green, the patient has a ManageMyHealth™ record



#### Q: How do I set up automatic or out of office replies for my MMH Messages?

You can set automatic replies from providers who do not wish to use E-messaging via MMH, or if you're going on leave. To do this, the provider must;

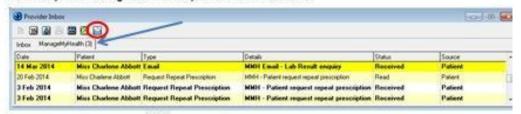
- 1. Click the MMH Icon on the toolbar
- 2. Go to: Inbox/settings
- 3. This will; bring up signature, out of office and autoreply.
- 4. Enter your auto or out of office message reply.

#### Q: How do I withhold individual items from being uploaded onto the MMH?

To withhold a singular classification, medication or inbox item from being uploaded to MMH, tick Do Not Upload to MMH: ♥

### Checking MMH Messages on Medtech

Make sure you check your MMH Inbox regularly for any secure MMH messages coming in from patients. You will find the messages in the ManageMyHealth tab in the *Provider Inbox* and can see how many new messages there are by the number in brackets.



Note: You can also click the Icon to initiate a message to a patient on MMH

# Recall Contact List - Patient Portal Recall Reminders

You are able to send Patients on the Patient Portal recall reminders via the Recall Contact List ! The Out box document recall templates must first be setup and linked to screening or vaccine terms before this feature can be used

### Step 1 In Medtech32: <u>Mudula</u> lepor: ools Jake: Lelup Manage⊻ni salih Loru Navigate to Advanced Forms Mals Module/Recalls/Screening/Recall Contact List Clinical 🖺 labels... Ctrl (Pl0 Out Box Patient Register Ho Patient Recalls 无 Medical Calculator Step 2 Filter the recall contact with required settings Step 3 To generate recall reminders to The Patient **Portal** 1. Click the MMH Icon 2. You will receive notification of how many Recall Contact recall emails have been sent to Portal Due Name 12.lun 2015 SMITH Kerru '3145) Day Sends recall reminder to all MMH patients Ou ! A recall reminder to the Patient Portal will be generated for patients where Patients registered for The Patient Warning Where a template exists 3 of 6 Recall MMH-Fmail(s) will not be generated as then patients are not registered to MMH. No contact has been made OK ! Continue to send recall reminders to Patients not on the Patient Portal via your usual system

| After generating the recall reminders via The Patient Portal , the recall contact list will be updated with the following information  Last Contacted – MMH Email Contacted Date  | Last Contacted  |
|---|---|
| The patients daily record and outbox will display that the recall has been sent   | SFE  Recall Letter - Cervical Smear MMH  Tok Date Document Subject Folder Prov  14 Jun 2015 CXMMH Cervical Smear MMH D0 SFE |
| <ul> <li>Patients will receive the following</li> <li>A notification alert in their email account</li> <li>A recall reminder email in their The Patient Portal with a link to create an appointment for the recall</li> </ul>   |   |
| After the Patient views the email, update messages will be sent back to the Provider inbox in Medtech32 as follows  Jef an appointment is booked an Appointment booked message will be received  Jef the message is read but no appointment is booked a Read message will be received  Jef the recall contact list reminder response column will be updated with Appointment booked or Read | ● March Control  10 単 20 単 10 日 1   |

### Patient Portal Screening Secure Messages

If your practice has activated screening terms on the Patient Portal, Patients are able to update their screening measurements and send this information back to Medtech32 as a secure message into the ManageMyHealth Provider Inbox in Medtech32 for review and filing.

! Screening download settings should only be set to manual download

### Step 1 L E 83 R Provider Inbox Open the Provider inbox 2. Click: ManageMyHealth tab Double click: on the screening message you wish to review and action Step 2 Monage MyHealth\* Message Tick the screening term/s you wish to HEALTH download ManageMyHealt Click: Download Screenings, to update the patients record in Mt32 From: SUSAN HANKS Received: 30 Sep 2015 02.05 pm Click: File to file the message and Date Measured 30 Sep 2015 2.05 FM close the window ! If you don't wish to download the patients screening measurement to their record, Click: File Secure screening messages will display in the 30 Sep 2015 (Wednesday) SFE patients daily record and the Jan MMH - Health Indicator ManageMyHealth Tab of the Patients Inbox MMH - Health Indicator MMH - Health Indicator Any screening measurements that have been downloaded will display in Patient Screening/ManageMyHealth Tab