

SECTION FIVE: PRACTICE MANAGER USER GUIDES



Out of Office Options

! There are a number of options to manage patients email contacts and repeat prescriptions when staff are away

Option 1 Turn on the out of office reply

This is an individual provider setting

Patients will see the wording “out of office” when selecting the staff member they are emailing. They will also receive the out of office reply that has been setup by the staff member.

! The Patients secure email will still be sent to the Medtech32 and ManageMyHealth Patient Portal inbox

! Refer to the Message settings guide for instructions to activate out of office replies

Option 2 - Automatically forward to another staff member

1. In Medtech32 navigate to Setup/Staff Members
2. Select the staff member
3. Select the ManageMyHealth Tab
4. Select the start and finish date and the forward to Provider
5. Click: Save

! Any messages sent will automatically appear in the Forwarded To Providers inbox. The patient will not be aware when sending the email that the Provider they selected is away unless the out of office reply is turned on

! Only new messages received after the start date will be forwarded

! Messages from patients will still display in the original Providers Patient Portal inbox on ManageMyHealth




ManageMyHealth™

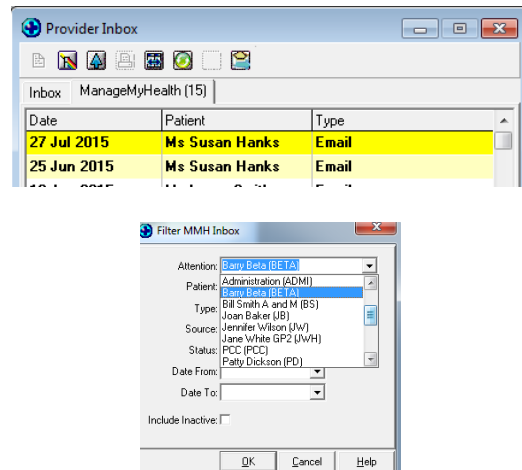
Patient has sent Secure Email

Forwarded To:	Dr B Beta (BETA)	Reason:	This message has been auto forwarded to you by SFE
From:	Ms Susan Hanks	NHI:	AAA9999
Date Sent:	27 Jul 2015 09:27 am		
To:	Dr Sam Entwistle		

Option 3 – Filter the Provider Inbox to view and respond to messages for another provider

1. Open the Provider Inbox
2. Click the filter icon 
3. Select the Provider under the Attention to field
4. Click Ok

(The Version 21 Build 4737 release has update the Provider inbox filter so that any selections are reflected in both tabs)

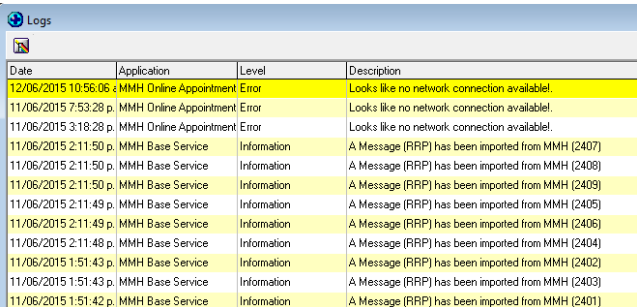


Checking the Log File

The log file in Medtech32 displays the messages sent to and from the Patient Portal (and other services). This should be checked on a regular basis and is the first place to go to check if The Patient Portal is not working.

View the log file for the practice

1. Select Patient/Close Active Patient
 2. Navigate to Help/Logs
 3. The log file will display for the entire practice.
 4. Check the date and time is recent and there are no errors.
 5. If the time is not recent or there are errors, restart your Medtech Service on the Server (Not the Server or Medtech32)
 6. If there is no change contact Medtech Support
- ! You may need to contact your IT Support person to do this*

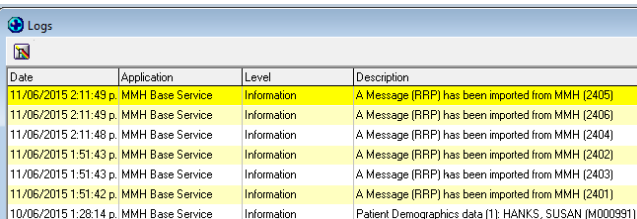


Date	Application	Level	Description
12/06/2015 10:56:06	MMH Online Appointment	Error	Looks like no network connection available!
11/06/2015 7:53:28 p.	MMH Online Appointment	Error	Looks like no network connection available!
11/06/2015 3:18:28 p.	MMH Online Appointment	Error	Looks like no network connection available!
11/06/2015 2:11:50 p.	MMH Base Service	Information	A Message (RRP) has been imported from MMH (2407)
11/06/2015 2:11:50 p.	MMH Base Service	Information	A Message (RRP) has been imported from MMH (2408)
11/06/2015 2:11:50 p.	MMH Base Service	Information	A Message (RRP) has been imported from MMH (2409)
11/06/2015 2:11:49 p.	MMH Base Service	Information	A Message (RRP) has been imported from MMH (2405)
11/06/2015 2:11:49 p.	MMH Base Service	Information	A Message (RRP) has been imported from MMH (2406)
11/06/2015 2:11:48 p.	MMH Base Service	Information	A Message (RRP) has been imported from MMH (2404)
11/06/2015 1:51:43 p.	MMH Base Service	Information	A Message (RRP) has been imported from MMH (2402)
11/06/2015 1:51:43 p.	MMH Base Service	Information	A Message (RRP) has been imported from MMH (2403)
11/06/2015 1:51:42 p.	MMH Base Service	Information	A Message (RRP) has been imported from MMH (2401)

View the log file for an individual patient


1. With the correct patient on the palette navigate to Help/Logs
2. Check the date and time is recent and there are no errors.

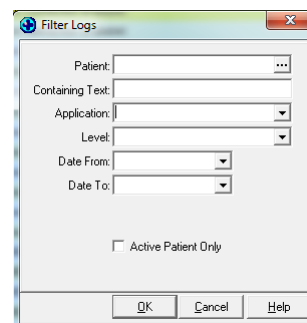
Refer to the instructions above if any issues



Date	Application	Level	Description
11/06/2015 2:11:49 p.	MMH Base Service	Information	A Message (RRP) has been imported from MMH (2405)
11/06/2015 2:11:49 p.	MMH Base Service	Information	A Message (RRP) has been imported from MMH (2406)
11/06/2015 2:11:48 p.	MMH Base Service	Information	A Message (RRP) has been imported from MMH (2404)
11/06/2015 1:51:43 p.	MMH Base Service	Information	A Message (RRP) has been imported from MMH (2402)
11/06/2015 1:51:43 p.	MMH Base Service	Information	A Message (RRP) has been imported from MMH (2403)
11/06/2015 1:51:42 p.	MMH Base Service	Information	A Message (RRP) has been imported from MMH (2401)
10/06/2015 1:28:14 p.	MMH Base Service	Information	Patient Demographics data (1): HANKS, SUSAN (M000991)

Filter the Log file

1. Click the filter icon 
2. Select Application to filter for different products – i.e. MMH or SMS etc.
3. Select level to filter for different status



Filter Logs

Patient:

Containing Text:

Application:

Level:

Date From:

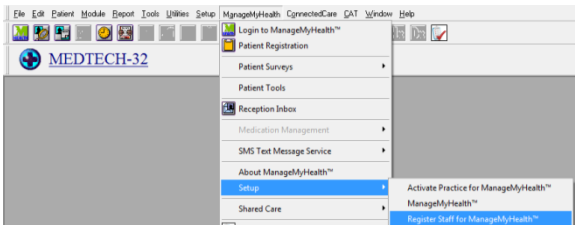
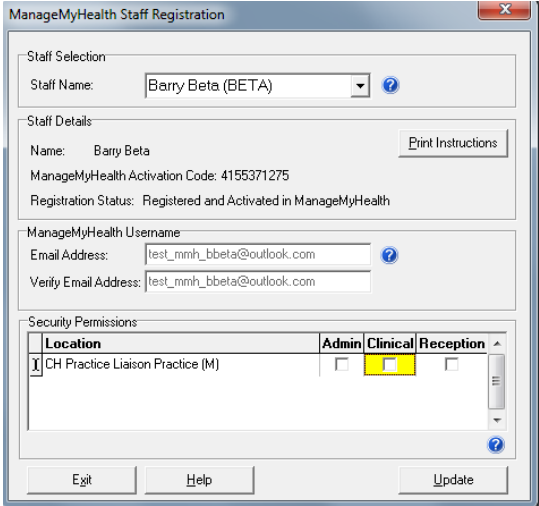
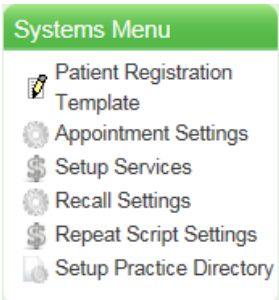
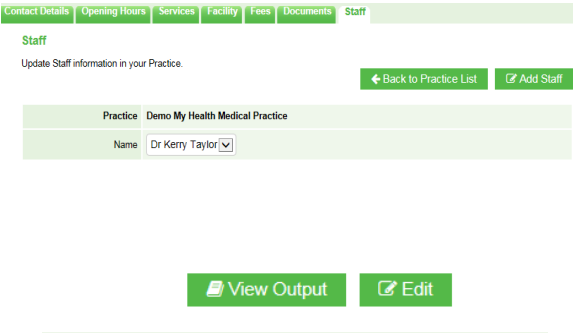
Date To:

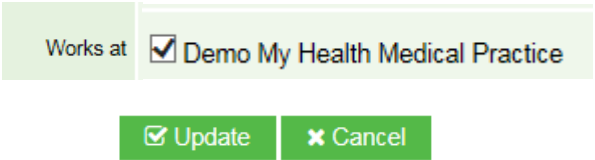
☐ Active Patient Only

OK Cancel Help

Removing Access When Staff leave the Practice

When a staff member or patient leaves the practice, you should remove their access from The Patient Portal. To do this you must remove their Patient Portal permissions.

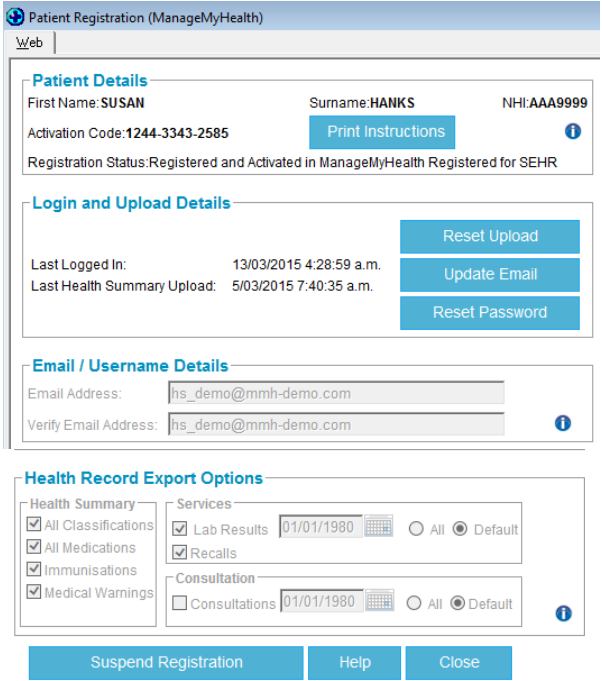

<p>Staff</p> <p>Step 1</p> <p>In Medtech</p> <p>Naviagte to ManageMyHealth/Setup/Register Staff for ManageMyHealth</p> <p>The <i>Staff Registration</i> Screen will be displayed.</p>	
<p>Step 2</p> <ol style="list-style-type: none"> 1. Select the staff member you wish to de-register from the <i>Staff Name</i> drop down list. 2. Ensure all <i>security permissions</i> are <u>not</u> ticked for this staff member. 3. Select the <i>Update</i> button. <p><i>! You can now make this staff member inactive in Medtech32</i></p>	
<p>Step 3</p> <p><i>! If this staff member is setup on the Patient Portal home page you will need also need to remove their name from this display</i></p> <ol style="list-style-type: none"> 1. Log in to the Patient Portal 2. Under the Systems Menu Select Setup Practice Directory 	
<ol style="list-style-type: none"> 3. Select the staff tab 4. Select the required staff member from the drop down selection 5. Scroll down and select the edit button 	

<p>6. Remove the tick from “works at”</p> <p>7. Click Update</p> <p><i>! NB, this staff members name will no longer be displayed to the patient on the home page, however you are not able to remove them from this list</i></p>	 <p>The screenshot shows a web interface for managing staff. A dropdown menu labeled 'Works at' is open, showing a single option: 'Demo My Health Medical Practice' with a checkmark icon to its left. Below the dropdown, there are two green buttons: 'Update' (with a checkmark icon) and 'Cancel' (with an 'x' icon).</p>
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Changing Patients Health Summary Status

If in the future your practice wishes to change patient the health summary default settings for patients already registered in the patient portal i.e. patients will now have access to their consult notes, a manual process for each patient must be followed

! You may wish to send your patients a group email message to advise them of the changes

<p>Step 1 In Medtech32</p> <ol style="list-style-type: none"> 1. Ensure the correct patient is in context on the pallette 2. Navigate to ManageMyHealth/ Patient Registration 	
<p>Step 2</p> <ol style="list-style-type: none"> 1. Click Suspend Registration 2. Click Yes on the Confirm Suspension 3. Click OK on the next message 4. Click Close on the Patient Registration Screen 	

Step 3

1. Reopen the Patients registration screen
2. Update the details as required
3. Click Re-Register
4. Click Ok

! The patient will get a confirmation email from the Patient Portal informing them their account has been reset. There is no action required by them.

Health Record Export Options

Health Summary <ul style="list-style-type: none"><input checked="" type="checkbox"/> All Classifications<input checked="" type="checkbox"/> All Medications<input checked="" type="checkbox"/> Immunisations<input checked="" type="checkbox"/> Medical Warnings	Services <ul style="list-style-type: none"><input checked="" type="checkbox"/> Lab Results 01/01/2015 <input type="radio"/> All <input checked="" type="radio"/> Default<input checked="" type="checkbox"/> Recalls
Consultation <ul style="list-style-type: none"><input checked="" type="checkbox"/> Consultations 01/07/2015 <input type="radio"/> All <input checked="" type="radio"/> Default	

☐ Screening [Screening setup](#)

[Re Register](#) [Help](#) [Close](#)

ManageMyHealth Patient Registration

1100: SUSAN HANKS re-registered successfully

[OK](#)

Patient Registration Numbers Query Builder

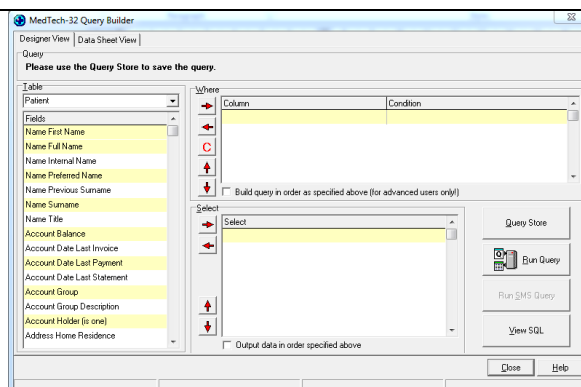
This guide provides you with information on how to import and run the Patient Registration Numbers query builder. This query builder can be modified to include demographic information which is not available in the Usage Reports in the Patient Portal

Step 1

Save the query builder file from the email (do not attempt to open the file), right click on the file and save the file to a folder or desktop

Step 2

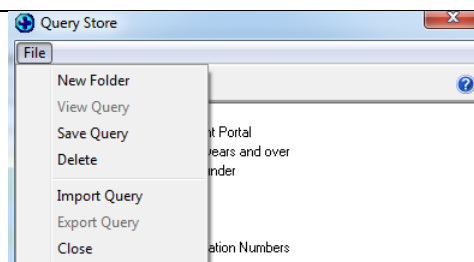
In Mt32, go to **Tools/Query Builder**



Step 2

Click on **Query Store**

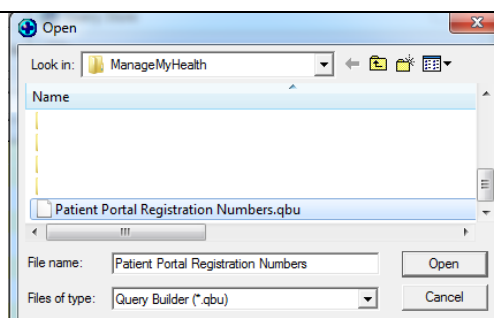
Select **File** then **Import Query**



Step 3

Browse for the query builder file you have saved above

Click on **Open** (the Query builder will now be saved and display in the Query Builder)

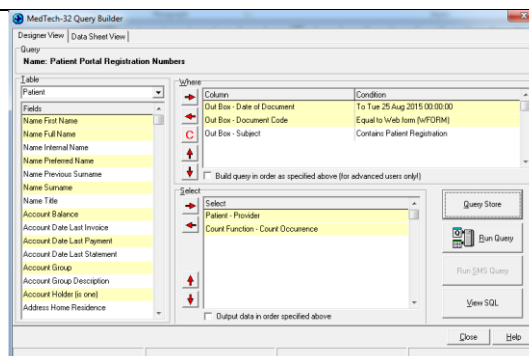


Step 4

Modify the date of document condition

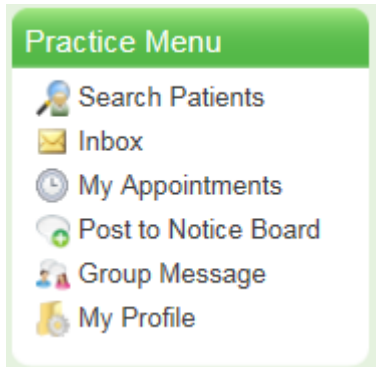
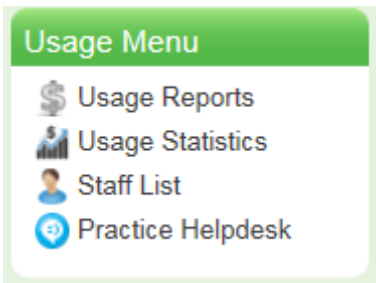
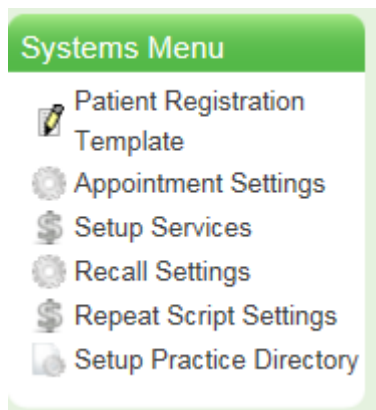
Click on **Run Query**

This query builder can be altered to provide you with additional information e.g Ethnicity Age. These fields will be added to the select section of the query builder. Remember to have the Count function at the end of your selection



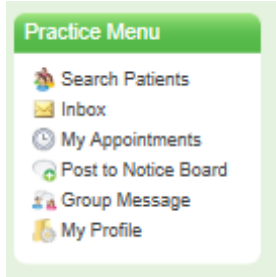
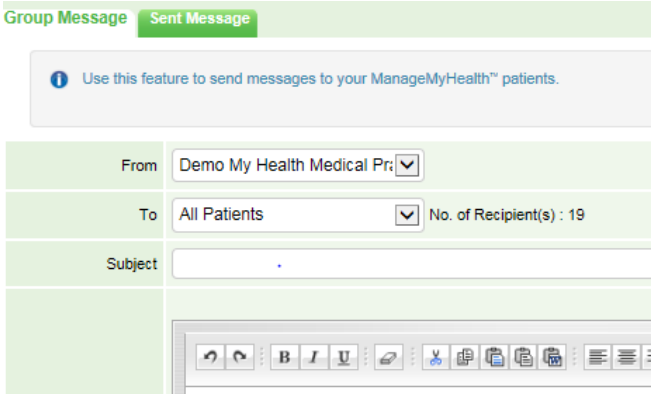
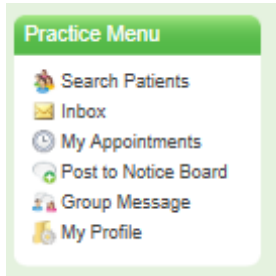
Patient Portal Website Quick Guide

This guide provides you with a quick reference on where to go in the Patient Portal to make changes

<p>Practice Menu</p> <ul style="list-style-type: none"> • Setup your Profile • Search for patients • View All appointments made by patients • View Email messages • Send a group email to patients • Post update messages to patients 	
<p>Usage Menu</p> <ul style="list-style-type: none"> • Reports on numbers of different types of e-services used by patients • Reports on numbers of emails, patients activated etc. • View the list of staff registered 	
<p>Systems Menu</p> <ul style="list-style-type: none"> • Setup e-services/terms and conditions • Edit practice home page, practice hours, patient fees • Edit Patient Terms and Conditions • Edit Appointment terms and conditions • Turn on/off recall reminder • Repeat Prescription terms and conditions – also available in Setup Services 	

Group Messages & Notice Board Messages

You are able to contact your patients more easily with The Patient Portal by sending group messages or adding new notice board posts, which will be available to all of your patients registered on the Patient Portal

<p>Group Messages</p> <p>Step 1</p> <p>Sign into The Patient Portal</p> <p>Navigate to Practice Menu</p> <p>Click Group message</p> <p><i>! This will take you to compose a new group message</i></p>	
<p>Step 2</p> <p>Enter the message details</p> <ol style="list-style-type: none"> 1. Select which Recipient Group under To 2. Enter Subject 3. Enter Message 4. Press Send Message <p><i>! Your message will be sent to the patients' Group Messages Inbox, which shows on the patients' homepage on the Patient Portal. They will also receive an email to their email address to say they have a new inbox message on The Patient Portal.</i></p> <p><i>! Patients cannot reply to this message</i></p>	
<p>Notice Board</p> <p>Step 1</p> <p>Sign into the Patient Portal</p> <p>Navigate to Practice Menu</p> <p>Click Post to Notice Board</p> <p><i>! This will take you to show all of your current Notice board messages</i></p>	

Step 3

Click New Post

! This will take you to compose a new Notice board message

Post to Notice Board

Click on 'New Post' Link to create a new post. Select Content Type Content Header , Start date and End date and click on Save to Add or Modify Content for new post. [Read more](#)

Health Centre: CH Practice Liaison Practice [New Post](#)

Drag a column header here to group by that column.

Content Type	Content Header	End Date	Active	Delete
News	Patient Portal Available!	30 May 2014	Yes	

Records per page: 10 Records: 1 - 1 of 1 - Pages: 1 < 1 > 11 Go to page »

Step 4

1. Define what type of notice it is under Content Type and Content Header
2. Select the date range you would like the notice to be available for
3. Enter the message in message body

! You will need to add your own categories to use under Content Type and Content Header

! Use any of the formatting tools to enhance your message

Use this form to add or edit Content for displaying information to your practice members.

Content Type: Select Type Start Date: 30/07/2014

Content Header: Select Header End Date: 29/08/2014

Font: default

Size: default Header: No Header

Step 5

Click Save

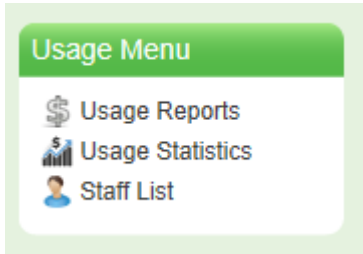
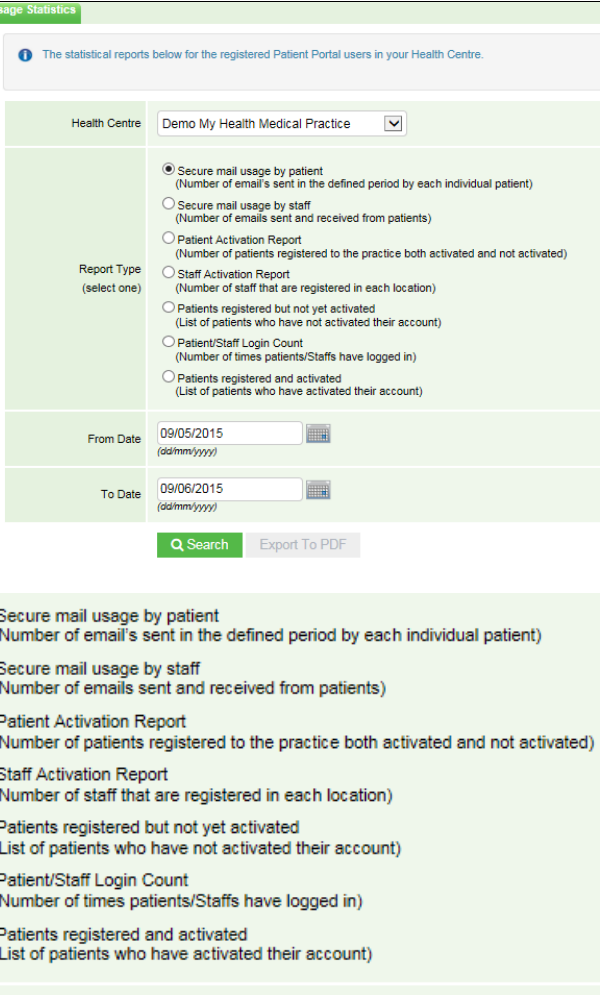

! Your new notice will be saved to your practice profile and will be available to your patients under the 'My Health' menu

[Save](#) [Cancel](#)

Usage Reports and Statistics

The usage report and usage statistics are useful tools to find out how your staff and your patients are using The Patient Portal

Usage Statistics

<p>Step 1 Sign into The Patient Portal</p> <p>Navigate to the Usage Menu</p> <p>Click on Usage Statistics</p> <p><i>! This will show a list of all the Patient Portal standard Usage Reports.</i></p>	
<p>Step 2</p> <ol style="list-style-type: none"> 1. Ensure the correct Health Centre is selected 2. Select which report you would like to run 3. Select a date range of the information you would like. 	
<p>Step 3</p> <p>Click Search</p> <p style="text-align: center;">or</p> <p>Click Export to PDF, if you would like to save the report as a PDF document.</p>	

Usage Report

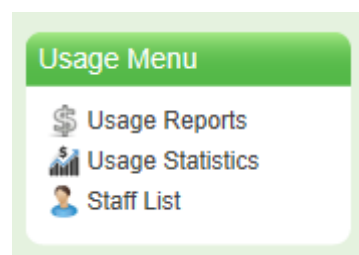
Step 1

Sign into The Patient Portal

Navigate to the Usage Menu

Click on Usage Report

! This report allows you to filter what information you would like to know about your Patient Portal usage. It can also be used to match against invoices generated for services in Medtech32



Step 2

Use the filters to define what information you would like to find out.

! Fill in as much or as little as you would like to in the filters.

Usage Reports

The Reports below show the usage of services in your Health Centre. Use the filters to drilldown to the level of detail you required the result can be exported to excel for further analysis.

Health Centre	CH Practice Liaison Practice	Location	All Locations
Service Provider	Any	Service Type	<input checked="" type="radio"/> Active <input type="radio"/> Inactive
From Date		To Date	
Request Number		Status	Open
Patient First Name		Patient Last Name	
NHI Number		<input type="button" value="Search"/> <input type="button" value="Clear Filter"/>	

Step 3

Click Search

or

Click Export to PDF, if you would like to save the report as a PDF document.



Increasing Patient Numbers

This guide provides you with suggestions on how you can increase the number of patients registered to the Patient Portal

Option 1 - Contact the patients registered but not yet activated

1. **Log into the Patient Portal**
2. **Under the Practice menu Select: Group Message**
3. **In the To field – select Patients Registered but not yet activated**
4. **Enter a subject**
5. **Type your message**
6. **Click Send Message**

Practice Menu

- Search Patients
- Inbox
- My Appointments
- Post to Notice Board
- Group Message
- My Profile

Use this feature to send messages to your ManageMyHealth™ patients.

From: Demo My Health Medical Pri

To: Patients registered but not yet activated No. of Recipient(s) : 19

Subject: Registration for the Patient Portal

Message:

Dear Patient

We note from our records that you have yet to activate your account for the Patient Portal. The Patient Portal has a number of benefits to you which include access to your health information and your lab results (once your doctor has seen them) as well as the ability to communicate via secure message. To complete your activation please follow the instructions you received at our Practice. Remember to go to your email to verify the process. If you experience any issues, please contact the practice. We would be grateful if you are able to complete this process as soon as possible.

Regards
Diana
Practice Administrator

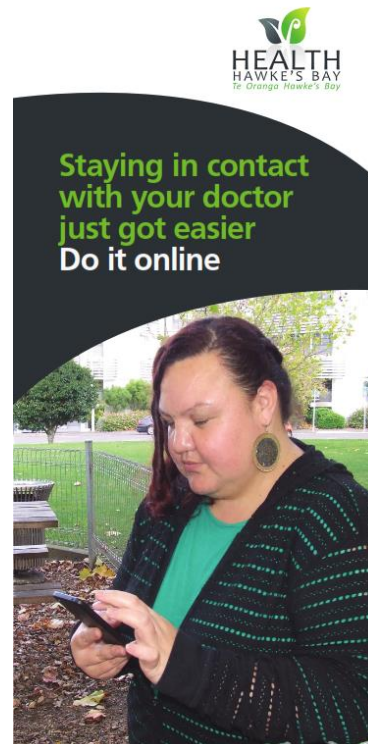
Send Message

Option 2 - Make the Patient Portal available to all of your patients

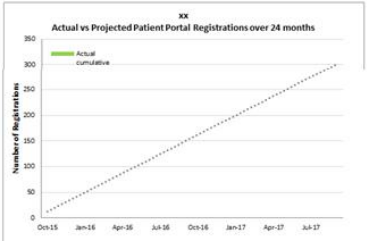
1. **Ensure the Patient Portal Brochures and posters are displayed in your waiting room and consultation rooms**
2. **Confirm who is registering patients and where this will be done. Some GP's are registering patients in their consult time**

NB: Asking patients to come back to register may be a missed opportunity

! Ensure all of your practice staff are familiar with the patient portal and are able to answer any questions patients may have









<p>Option 3 – Market the Patient Portal to Patients</p> <ol style="list-style-type: none"> 1. Add information to your Practice website 2. Add information to your Practice newsletter 3. Send Patients a text message with information on the Patient Portal and inviting them to come in and register 4. Add a Patient Portal brochure to any mail outs i.e statements/invoices 5. Offer to patients when they phone the practice for a repeat prescription 6. Hand out to all patients at reception 7. Offer to all new patients who are of eligible age, attach the brochure to enrolment forms 	
<p>Option 4 - Target to specific groups of patients</p> <ol style="list-style-type: none"> 1. Advise patient who are sending your emails that you will no longer be communicating with patients through general email 2. Send brochure via mail or email (available on the Pinnacle website) <p>Query Builder</p> <ol style="list-style-type: none"> 3. Target Patients with specific conditions i.e. diabetics 	

<p>4. Setup an outbox document with information on the patient portal</p> <p>5. Build and run a query builder to find these patients</p> <p>6. Merge this query to the outbox document you have created</p>																																																																																																																																																							
<p>Option 5 - Set targets for staff.</p> <p>Use the Patient Portal Registration Querybuilder and Registration tracking graph to assist you with this</p> <p>1. Create a challenge for staff to talk to X number of patients per day or per week about registering</p> <p>or</p> <p>2. Challenge staff to register X number of patients per day or per week.</p> <p>NB: Consider a competition and creating a visual display in your staff room of the results</p>	<p>Practice Name _____ Patient Portal Registrations over 24 months</p> <p><small>This template is designed to assist your practice with tracking patient portal registrations. Enter practice information into the shaded cells and the corresponding graph data will be generated. Please note that cells containing calculations are locked and can not be adjusted. Run the Usage Statistics Report in the Patient Portal or the Registration Query builder to enter actual numbers of registrations achieved in the Actual cumulative column.</small></p> <p><small>= cells that can be edited</small></p> <table border="1"> <thead> <tr> <th></th><th>Target</th><th>per Month</th><th>per Week</th><th>per GP</th><th>Actual cumulative</th></tr> </thead> <tbody> <tr><td>Oct-15</td><td></td><td>12.5</td><td>3.1</td><td>0.6</td><td>0</td></tr> <tr><td>Nov-15</td><td></td><td>25.0</td><td>3.1</td><td>0.6</td><td>0</td></tr> <tr><td>Dec-15</td><td></td><td>37.5</td><td>3.1</td><td>0.6</td><td>0</td></tr> <tr><td>Jan-16</td><td></td><td>50.0</td><td>3.1</td><td>0.6</td><td>0</td></tr> <tr><td>Feb-16</td><td></td><td>62.5</td><td>3.1</td><td>0.6</td><td>0</td></tr> <tr><td>Mar-16</td><td></td><td>75.0</td><td>3.1</td><td>0.6</td><td>0</td></tr> <tr><td>Apr-16</td><td></td><td>87.5</td><td>3.1</td><td>0.6</td><td>0</td></tr> <tr><td>May-16</td><td></td><td>100.0</td><td>3.1</td><td>0.6</td><td>0</td></tr> <tr><td>Jun-16</td><td></td><td>112.5</td><td>3.1</td><td>0.6</td><td>0</td></tr> <tr><td>Jul-16</td><td></td><td>125.0</td><td>3.1</td><td>0.6</td><td>0</td></tr> <tr><td>Aug-16</td><td></td><td>137.5</td><td>3.1</td><td>0.6</td><td>0</td></tr> <tr><td>Sep-16</td><td></td><td>150.0</td><td>3.1</td><td>0.6</td><td>0</td></tr> <tr><td>Oct-16</td><td></td><td>162.5</td><td>3.1</td><td>0.6</td><td>0</td></tr> <tr><td>Nov-16</td><td></td><td>175.0</td><td>3.1</td><td>0.6</td><td>0</td></tr> <tr><td>Dec-16</td><td></td><td>187.5</td><td>3.1</td><td>0.6</td><td>0</td></tr> <tr><td>Jan-17</td><td></td><td>200.0</td><td>3.1</td><td>0.6</td><td>0</td></tr> <tr><td>Feb-17</td><td></td><td>212.5</td><td>3.1</td><td>0.6</td><td>0</td></tr> <tr><td>Mar-17</td><td></td><td>225.0</td><td>3.1</td><td>0.6</td><td>0</td></tr> <tr><td>Apr-17</td><td></td><td>237.5</td><td>3.1</td><td>0.6</td><td>0</td></tr> <tr><td>May-17</td><td></td><td>250.0</td><td>3.1</td><td>0.6</td><td>0</td></tr> <tr><td>Jun-17</td><td></td><td>262.5</td><td>3.1</td><td>0.6</td><td>0</td></tr> <tr><td>Jul-17</td><td></td><td>275.0</td><td>3.1</td><td>0.6</td><td>0</td></tr> <tr><td>Aug-17</td><td></td><td>287.5</td><td>3.1</td><td>0.6</td><td>0</td></tr> <tr><td>Sep-17</td><td></td><td>300.0</td><td>3.1</td><td>0.6</td><td>0</td></tr> </tbody> </table> <p>Population: 1000 <small>Enter either your total practice population or those aged 16</small> % Registrations to achieve: 30% <small>Enter the % of registrations for your practice between 20-40</small></p> <p>Target: 300 Month Implemented: Oct-15 <small>Enter the month of implementation as eg 01/09/2015</small> Month End: Oct-17 Total Months: 24 Number of GPs: 5 <small>Enter the number of GPs in your practice</small></p>  <p>The graph shows 'Actual' registrations as a green line and 'Projected cumulative' as a dotted line. The x-axis represents months from Oct-15 to Jul-17, and the y-axis represents the 'Number of Registrations' from 0 to 350. The projected line is a straight line from (Oct-15, 0) to (Jul-17, 300). The actual line follows this projection closely.</p>		Target	per Month	per Week	per GP	Actual cumulative	Oct-15		12.5	3.1	0.6	0	Nov-15		25.0	3.1	0.6	0	Dec-15		37.5	3.1	0.6	0	Jan-16		50.0	3.1	0.6	0	Feb-16		62.5	3.1	0.6	0	Mar-16		75.0	3.1	0.6	0	Apr-16		87.5	3.1	0.6	0	May-16		100.0	3.1	0.6	0	Jun-16		112.5	3.1	0.6	0	Jul-16		125.0	3.1	0.6	0	Aug-16		137.5	3.1	0.6	0	Sep-16		150.0	3.1	0.6	0	Oct-16		162.5	3.1	0.6	0	Nov-16		175.0	3.1	0.6	0	Dec-16		187.5	3.1	0.6	0	Jan-17		200.0	3.1	0.6	0	Feb-17		212.5	3.1	0.6	0	Mar-17		225.0	3.1	0.6	0	Apr-17		237.5	3.1	0.6	0	May-17		250.0	3.1	0.6	0	Jun-17		262.5	3.1	0.6	0	Jul-17		275.0	3.1	0.6	0	Aug-17		287.5	3.1	0.6	0	Sep-17		300.0	3.1	0.6	0
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Icon Guide

This Guide lists the different Patient Portal Icons that are available in Medtech32 and their use

<p>Green Patient Portal Icon</p> <p>Patient is Registered for the Patient Portal (or no patient is on the palette)</p> <p>The Patient may also be registered for one or more of Medic Alert, Beating the Blues</p>	
<p>Orange Patient Portal Icon</p> <p>Patient Is not Registered for the Patient Portal</p> <p>Click to register the patient</p>	
<p>Compose secure message Icon</p> <p>Click on the icon to send the patient a secure message</p>	
<p>Compose Email Icon not enabled</p> <p>The patient on the palette is not registered for the Patient Portal</p>	
<p>Patient Portal Registration Icon</p> <p>Click to Register the Patient</p>	
<p>Reception inbox Icon</p> <p>View and action administration emails, change of address/phone numbers and appointment notifications from patients</p>	

Logging In to the Patient Portal

Step 1 to using the Patient Portal is knowing how to login. There are two ways to login to The Patient Portal, these are outlined below.

! You must be registered with The Patient Portal and have activated your account to login.

Option 1

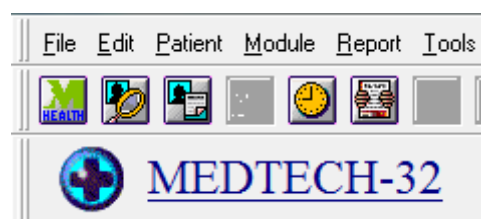
Within Medtech

Once you have activated your account, the easiest way to access The Patient Portal is via Medtech.

1. Click on the MMH icon on your toolbar in Medtech

! If a patient is on the palette and the MMH icon is Green, this patient is registered for the Patient Portal

! Medtech and the Patient Portal have a single sign-in approach, so by clicking this icon in Medtech, you will be automatically signed into your Patient Portal account and will not need to enter your password



Option 2

From a browser

If you do not have access to Medtech, you can login to The Patient Portal from any web browser.

1. Open an internet browser to www.managemyhealth.co.nz
2. Click on Secure Login
3. Enter your Username/Email address and password
4. Click Login

! This will log you into your Patient Portal account

