



Shared Care User Manual

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How do I Access a Patient from Concerto?

<p>Patient Search</p> <ul style="list-style-type: none"> Search for a patient using their NHI number. 																	
<p>Patient Details</p> <ul style="list-style-type: none"> From the Shared Care Record section click on 'View' 																	
<p>Shared Care Snapshot Summary</p> <ul style="list-style-type: none"> The Care Plan Summary details from the PMS are displayed as a PDF. The Snapshot view presents both the Personalised Care plan and the Advance Care Plan (if one exists) If there is a named Care Coordinator, their associated practice phone number will display If the patients is enrolled in MASS (pharmacy programme) this will display underneath the Care Team 	<table border="1" data-bbox="603 1444 1433 1624"> <thead> <tr> <th>Name</th> <th>Designation Facility Organisation</th> <th>Care Team Role</th> <th>Contact Details</th> </tr> </thead> <tbody> <tr> <td>Ross, Deborah</td> <td>Support Regional Shared Care Shared Care Programme</td> <td>Care Coordinator</td> <td>Telephone Number: 0800268626</td> </tr> <tr> <td>Curlew, Andrea</td> <td>Standard Designation ProCare Shared Care Programme</td> <td>Care Team Member</td> <td></td> </tr> <tr> <td>Eaves, Sam</td> <td>GP MedTech - hA Testing CMDHB</td> <td>Care Team Member</td> <td></td> </tr> </tbody> </table>	Name	Designation Facility Organisation	Care Team Role	Contact Details	Ross, Deborah	Support Regional Shared Care Shared Care Programme	Care Coordinator	Telephone Number: 0800268626	Curlew, Andrea	Standard Designation ProCare Shared Care Programme	Care Team Member		Eaves, Sam	GP MedTech - hA Testing CMDHB	Care Team Member	
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<p>Launching Shared Care</p> <ul style="list-style-type: none"> Select the SHARED CARE Icon from the top right hand Concerto menu. 																	



Security Challenge Screen

- The Shared Care program is launched in Context.
- Select **'Join Care Team'** or **'One-off access'**
- Click **Access Record**

Shared Care Record Access Information

Access to this patient record is subject to the privacy obligations detailed in your National Shared Care Plan Access Deed, or the terms and conditions of your employment with your DHB (whichever is applicable).

Access is logged for care team management and audit purposes. Patients may also be advised that you have accessed their record.

Note: This will be logged into the Audit log and will be part of the standard Privacy Audit

Reason for warning Care team membership access rule violation
 Access type One-off Access only Join the patient's care team

Reason for Access *

[Back](#) [Access Record](#)

Shared Care Program

- The Patient Overview Screen is then displayed in WTCC.

Whānau Tahī ADAMSON, Sally Born: 12-Sep-1954 (69y 2m) Gender: Female NHI: HAX1736 **Kaur, Ruby**

Patient Overview

Prescriptions

Detail	Dosage and Directions	Date Prescribed
Paracetamol (Generic) 100 mg/5 ml oral liquid suspension	Daily	20-Nov-2014

Current Diagnosis

Diagnosis Description	Diagnosis Notes
(G0.) Rheumatic fever (I45.5) Papilledema/OP t-type	I never filled out notes to see how it displayed in the field, so don't worry around or do not get another horizontal scroll bar for instance. This will tell :-)
(M52) Excision Morton's neuroma	
Goal (CA...)	
Depression (F31.3)	

Care Team

Name	Details	Role
Anon, Ruby	Consultant Regional Shared Care Shared Care Programme	Care Team Member
Text_ACP	Standard Designation Regional Shared Care Shared Care Programme	Care Team Member
Ross, Deborah	Support Regional Shared Care Shared Care Programme	Care Team Member
User_AHJ	Support Regional Shared Care Shared Care Programme	Care Team Member

Tasks

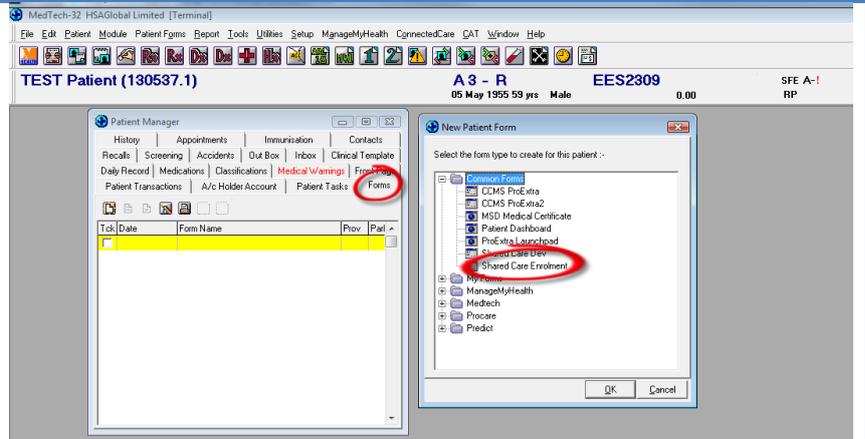
Due Date	Subject	Assigned To	Created By	Status
18-Sep-2014	My Goal	Ross, Deborah, George, Dipe	User_AHJ, Kaur, Ruby	Reassigned, Open



How do I Enrol a Patient from MedTech?

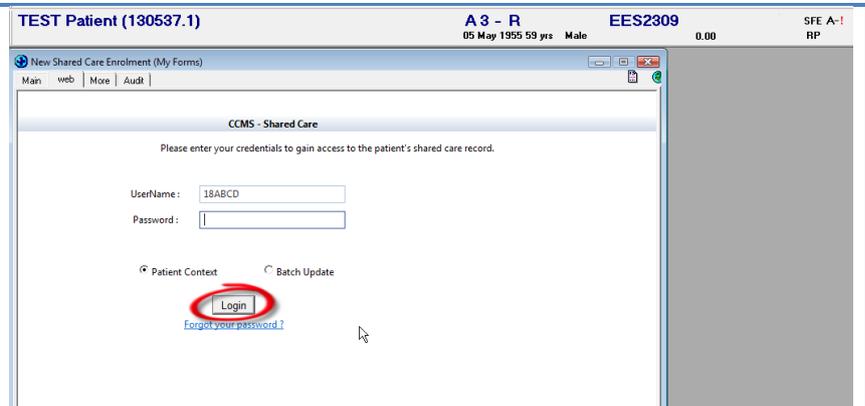
Launching Shared Care program

- In the MedTech program
- Select New Form
- Select **Shared Care**
- Click **OK**



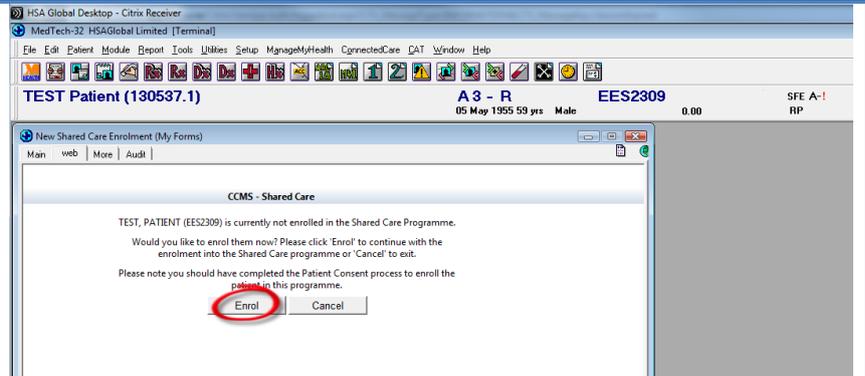
Login to Shared Care

- Enter your Shared Care Password
- Click **Login**



Patient Details Screen

- The Patient details are displayed.
- Click **Enrol** to complete the patient enrolment.





Patient Details Screen

- The Patient details are displayed.
- Click **Submit Enrolment** to complete the patient enrolment.

MedTech-32 HSAGlobal Limited [Terminal]

File Edit Patient Module Report Tools Utilities Setup ManageMyHealth ConnectedCare CAT Window Help

TEST Patient (130537.1) A 3 - R EES2309 05 May 1955 59 yrs Male SFE A-1 RP

New Shared Care Enrolment (My Forms)

Main web More Audit

CCMS - Shared Care

Please review and submit if enrolment details are correct

Data Preview	
Enrol To	Shared Care Management
Patient	TEST, PATIENT
NHI	EES2309

+ Patient Details

Screening:

+ Blood Pressure 9-DEC-2014

Diagnosis:

+ Hay fever - unspec allergen 9-DEC-2014

Medical Warning:

Expand/Collapse All

Comments

Submit Enrolment

Enrolment Confirmation

- The following message will display confirming the enrolment has been completed.

MedTech-32 HSAGlobal Limited [Terminal]

File Edit Patient Module Report Tools Utilities Setup ManageMyHealth ConnectedCare CAT Window Help

TEST Patient (130537.1) A 3 - R EES2309 05 May 1955 59 yrs Male SFE A-1 RP

New Shared Care Enrolment (My Forms)

Main web More Audit

CCMS - Shared Care

The system will take up to 2 minutes to process your request. If you do not wish to wait for the processing to complete you can close this form. The system will still continue to process your request if you exit this form. The outcome of the request will be sent to you via an EDI message.

Loading...



How do I launch a Patient's details in Context from MedTech?

Launching Shared Care program

- In the MedTech program select **Forms**.
- Select **Shared Care**

The screenshot shows the MedTech interface for a patient named TEST Patient (130537.1). The 'New Patient Form' dialog box is open, displaying a list of form types. The 'Forms' menu item is circled in red, and the 'Shared Care Enrollment' option is also circled in red.

Login to Shared Care

- Enter your Shared Care Password
- Click Log In

The screenshot shows the 'New Shared Care Enrollment (My Forms)' screen. The 'Login' button is circled in red.

Shared Care Program Screen

- The Patient Overview Screen will show in context.

The screenshot shows the 'Patient Overview' screen for TEST, PATIENT (Mr). The screen displays various patient details, including prescriptions, current diagnosis, care team, and tasks.



How do I complete a Batch Update from MedTech?

Launching Shared Care program

- In the MedTech program selects **Forms**.
- Enter your Shared Care Password
- Select **Batch Update**
- Click Enter

Note: Batch update needs to be executed at least once a day. This ensures that all the relevant data from MedTech is up-to-date in WTCC.

MedTech-32 HSAGlobal Limited [Terminal]

File Edit Patient Module Report Tools Utilities Setup ManageMyHealth ConnectedCare CAT Window Help

TEST Patient (130537.1) A 3 - R EES2309
05 May 1955 59 yrs Male 0.00 SFE A-1 RP

New Shared Care Enrolment (My Forms)

Main web More Audit

CCMS - Shared Care

Please enter your credentials to gain access to the patient's shared care record.

UserName: 18ABCD
Password:

Patient Context Batch Update

Login

[Forgot your password?](#)

Shared Care Program Screen

- Select **Submit Batch Update**

MedTech-32 HSAGlobal Limited [Terminal]

File Edit Patient Module Report Tools Utilities Setup ManageMyHealth ConnectedCare CAT Window Help

TEST Patient (130537.1) A 3 - R EES2309
05 May 1955 59 yrs Male 0.00 SFE A-1 RP

New Shared Care Enrolment (My Forms)

Main web More Audit

CCMS - Batch Update

Checking 36 of 166 patients for updates

Patient	NHI
AARON, ANDY	TKU8260
ABBOT, WILSON	MKU8373
ABBOTT, CHARLENE	GSM2648
ABERCROMBIE, PETER	HCC3467
ACP, CHECK	TWZ3575
ADAMS, ALAN	SWQ4722
ADAMSON, SALLY	MHF1234
ADMIT, QUICK	UF57268
ADMIT, QUICK NONE	PUH5739
ALLEN, JON	XQV4780
ANTONY, TONY	VZN7849
BEAR, FLUFFY	BTK8269

Loading...

TEST Patient (130537.1) A 3 - R EES2309
05 May 1955 59 yrs Male

New Shared Care Enrolment (My Forms)

Main web More Audit

CCMS - Batch Update

Batch Update Completed Tue Dec 9 10:32
Sent 0 message(s)

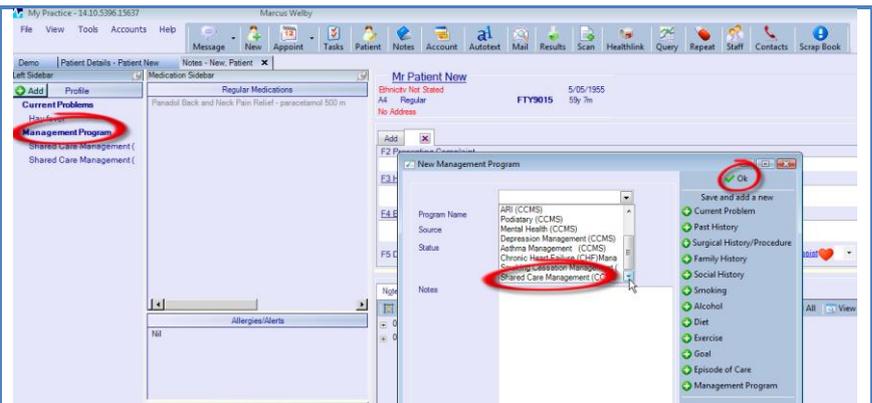
Patient	NHI
AARON, ANDY	TKU8260
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ABBOTT, CHARLENE	GSM2648
ABERCROMBIE, PETER	HCC3467
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ALLEN, JON	XQV4780
ANTONY, TONY	VZN7849
BEAR, FLUFFY	BTK8269



How do I Enrol a Patient from MyPractice?

Patient Details

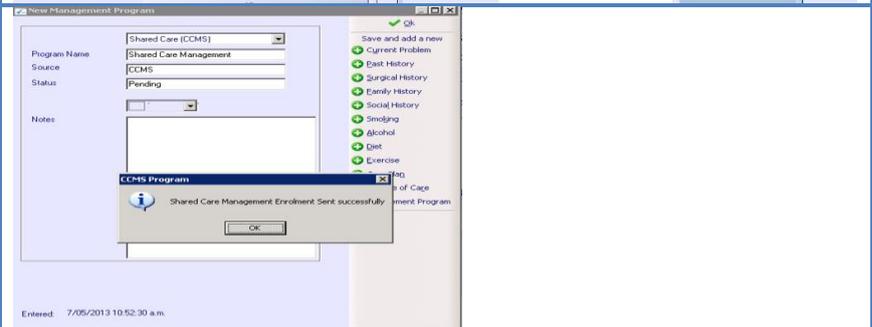
- From the Patient Details screen in the Web Forms section, right mouse click and select 'Management Program' and 'Shared Care Management' from the drop down menu, click 'OK' to save



Patient Notes Screen

- Successful enrolment message is returned

Note: It might take a few minutes for the enrolment to be completed in WTCC





How do I Access a Patient's record from MyPractice?

Patient Details

- From the Patient Notes screen select **Forms**
From the Forms menu select 'CCMS'

Presenting Complaint: 9 mins

History: DOC: Patient details sent to HSA

Diagnosis: DOC: Patient details sent to HSA

Forms / Documents (F9):
Click here to filter
19M Well Child Check
2Y Well Child Check
3M Well Child Check
3Y Well Child Check
4Y Well Child Check
5M Well Child Check
6M Well Child Check
Abuse - Domestic
Acne Irritators
Acne
Acute Asthma

WebForms (F9):
Click here to filter
ResPractice
Browser
CCMS
CRP
COPD
CVD
DEP
DIABETES
OTHER
Predict

Resources (F10):
Click here to filter
Abdominal examination
AIDS Treatment Profiles
Acne Education Slide Show
Alpecia Education Slide Show
American Family Physician
Anxiety and Panic Internet Resource
ARDS
Arthritis Education Slide Show
Asthma allergy and Immunology
Asthma and Respiratory Foundation
Asthma Education Slide Show

- The Patient Summary Screen is then displayed in the Shared Care Program.

Mr Patient New
Ethnicity Not Stated
A4 Regular FTY9015 5/05/1955 59y 7m
No Address

Consultation: 09/12/2014 10:39 a
Author: Marcus Welby
Authorized by: Marcus Welby

Address: http://ccms-nscp-preprod.hsaglobal.net/Encounters/PatientOverview.aspx

Whanau Tahī **NEW, Patient** Born 05-May-1955 (59y 7m) Gender Male NHI FTY9015
No Allergies or Alerts Recorded

Welby, Marcus
Settings Help
User Manual About
Log Out

Overview

Recent Activities

Care Team

Notes

Assessments

Plans

Measurements

Diagnosis

Rx History

Documents

Patient Portal

Consent

Programmes

Tasks

Messages

Patient Overview

Prescriptions

+ Add New

Detail	Dosage and Directions	Date Prescribed
No records to display.		

Current Diagnosis

+ Add New

Diagnosis Description	Diag... Notes
Hay fever (H172)	

Care Team

+ Add New

Name	Details
Welby, Marcus	GP MyPractice - hA Testing CMDHB

Tasks

+ Add New Refresh

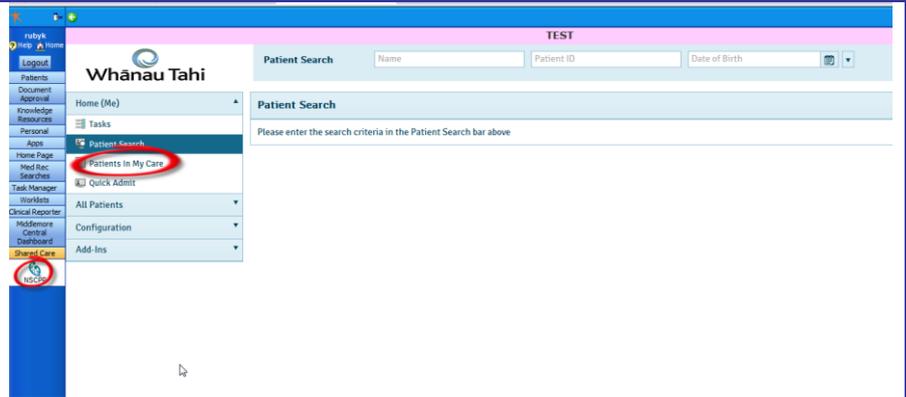
Due Date	Subject	Assigned To	Created By	Status
No records to display.				



How do I View “Patients In My Care” (for Concerto and Web Users)?

Patients In My Care

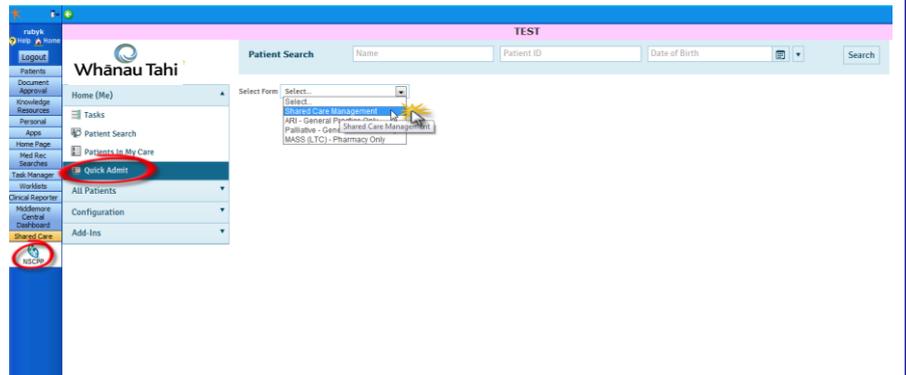
- From the Home screen select **Patients in My Care**
- WTCC will display a list of Patients you are a Care Team Member for the search function may be used to within this field.



How do I enrol a patient if I am not from a GP practice (Quick Admit)

Quick Admit

- A Patient may be enrolled in Shared Care by Secondary Care Providers using the **Quick Admit** function
- Select “**Shared Care Management**” from Select Form.
- Complete the mandatory Patient fields marked with a red asterisk
- Primary Care Providers on the Care Team may then perform an enrolment from the PMS which will populate the full Patient information. Please refer to the section on ‘**How to enrol from MedTech and My Practice**’.





How do I enrol a Patient in to the ARI/Palliative Care Programmes (for GP practice users only)

From the Patient Overview screen select 'Add New' under Programmes heading

The screenshot shows the Whānau Tahī Patient Overview screen for 'TEST, PATIENT (Mr)'. The patient's details include 'Born: 05-May-1955 (59y 7m)', 'Gender: Male', and 'NHI: EES2309'. The 'Programmes' section at the bottom has a red circle around the 'Add New' button.

Select 'ARI – General Practice Only' or 'Palliative – General Practice Only'

The 'Select Programme Form' dialog box contains the following text: 'Please select the appropriate form to continue. Depending on the form the information required to enroll to the programme will vary. Once the form is submitted the patient will be enrolled into the selected programme.' The options are 'ARI - General Practice Only', 'Palliative - General Practice Only', and 'MASS (LTC) - Pharmacy Only'. A red arrow points to the 'ARI - General Practice Only' option. A 'Cancel' button is located at the bottom right.

All the fields are Auto filled

Click on 'Save' to enrol the patient in the ARI Programme

The screenshot shows the 'ARI - At Risk Individuals' form. The title is 'ARI - At Risk Individuals' and the subtitle is 'Quick Admit - Enrolments into this programme must be completed by a GP or Practice Nurse only'. The form fields are: 'First Name: PATIENT', 'Middle Name: [empty]', 'Surname: TEST', 'Date of Birth: 05-May-1955', and 'NHI Number: EES2309'. The 'Save' button is circled in red.



How do I Disenroll a patient from an ARI/Palliative Care Programme?

<p>From the Patient Overview screen select 'Programmes'</p>	
<p>Click on the row that shows the Programme from which to disenroll the patient. Select 'Disenroll' from the drop down menu</p>	
<p>Select ROUTINE and then choose the 'Reason' for disenrollment and click on Save</p>	

How do I add to the Care Team?

<p>From the Care Plan page, select ADD and type the name of the person in the Member box. Choose from the list. Choose the Role. Click Save</p>	<table border="1" data-bbox="1114 1653 1449 1877"> <thead> <tr> <th>Name</th> <th>Organisation</th> <th>Facility</th> <th>Designation</th> </tr> </thead> <tbody> <tr> <td>Tibby, Sarah</td> <td>Shared Care Programme</td> <td>Regional Shared Care</td> <td>Support</td> </tr> <tr> <td>Eaves, Sam</td> <td>CMDHB</td> <td>MedTech - hA Testing</td> <td>GP (Care Team Member)</td> </tr> <tr> <td>Eaves, Sam</td> <td>CMDHB</td> <td>Mangere Health Centre</td> <td>GP (Care Team Member)</td> </tr> <tr> <td>Kaur, Ruby</td> <td>Shared Care Programme</td> <td>Regional Shared Care</td> <td>Support (Care Team Member)</td> </tr> </tbody> </table>	Name	Organisation	Facility	Designation	Tibby, Sarah	Shared Care Programme	Regional Shared Care	Support	Eaves, Sam	CMDHB	MedTech - hA Testing	GP (Care Team Member)	Eaves, Sam	CMDHB	Mangere Health Centre	GP (Care Team Member)	Kaur, Ruby	Shared Care Programme	Regional Shared Care	Support (Care Team Member)
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Eaves, Sam	CMDHB	Mangere Health Centre	GP (Care Team Member)																		
Kaur, Ruby	Shared Care Programme	Regional Shared Care	Support (Care Team Member)																		



Edit a Care Team Member:

You can remove members or change roles.

Highlight the member by clicking on the name.

Choose to Remove to take off the team, or Edit to change the Role.

Click Save

Care Team

Current Past **Remove** Edit Add

Summary

- Ross, Deborah** - Care Coordinator started on 20-May-2015
Clinical Pharmacist | Regional Shared Care | Shared Care Programme
- Tibby, Sarah** - Care Team Member started on 20-May-2015
Support | Regional Shared Care | Shared Care Programme
- Eaves, Sam** - Care Team Member started on 20-May-2015
GP | Mangere Health Centre | CMDHB

Member name Tibby, Sarah
Role Care Team Member
Start date 20-May-2015
End date -
Notes -

Inactive

Created by : Ruby Kaur [20-May-2015 09:46]

How do I Create a Care Plan?

From the Patient Overview page select the 'Plans' tab

Select the Create button

Choose Personalised Care Plan

Whānau Tahī **DOOR, Corri (Mr)** Born Gender Male NHI NEY7477
08-May-1973 (42y 0m)
No Allergies or Alerts Recorded More Details

Home (Me) Patient Plans

All Patients This Patient

Overview Recent Activities Care Team Notes Assessments **Plans** Measurements Diagnosis

Name Plan Type Created By

No records to display.

Create Edit My Medicines Adherence Plan Personalised Care Plan

The Personalised Care Plan opens with 3 core components at the top, 'About Me', 'What Matters to Me' and 'My Goal'.

The program also opens with ONE Heading named : **Heading: Things I Will Do**

Whānau Tahī **DOOR, Corri (Mr)** Born Gender Male NHI NEY7477
08-May-1973 (42y 0m)
No Allergies or Alerts Recorded More Details

Home (Me) History Print Save

All Patients This Patient

Overview Recent Activities Care Team Notes Assessments **Plans** Measurements Diagnosis Rx History Documents Patient Portal Consent Programmes Tasks Messages Configuration

Personalised Care Plan
Last modified by: on 20-May-2015

About Me

What Matters to Me

My Goal

+ New heading Show Active Only All All headings

Things I Will Do
There are no pending actions + New action

+ New heading History Print Save



To add a new heading from the template select '+New Heading'

Choose your new heading from the list by checking the box (can add as many as you prefer) and click **Add**

To Add and Action, select the '+New Action' text and type into the text box.

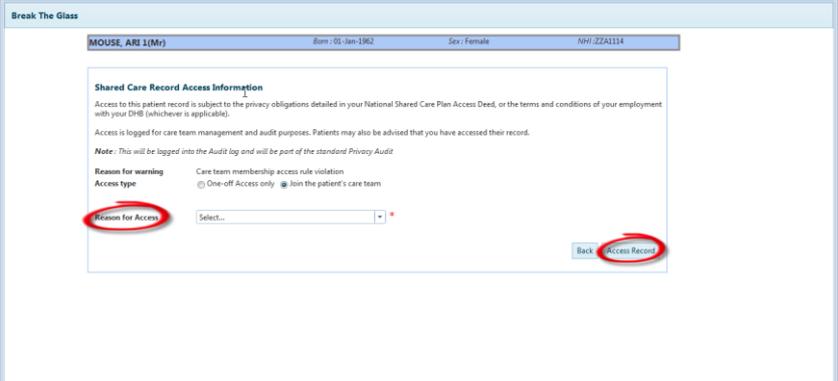
You can add a Due Date (Optional) by clicking on the Calendar icon 

Any Action can be cancelled by selecting  **Cancel**

Click the Save button to save all changes. The Save button will stay **ORANGE** until items are saved.



How do I access a Patient's record in Shared Care? (For Pharmacists and other Web Users)

<p>WTCC Login</p> <ul style="list-style-type: none"> Type the following URL in your Internet Explorer browser http://nscp-ccms.connected.health.nz/ Enter your username, password and click 'Login' 	 <p>Whānau Tahī NAVIGATING WAYS TO ASPIRATIONAL OUTCOMES</p> <p>Username <input type="text"/></p> <p>Password <input type="password"/></p> <p>Login</p> <p>Forgot your password?</p>																																																																		
<p>Patient Search</p> <ul style="list-style-type: none"> Type in the Patient Name, Patient NHI, or DOB of the patient Select Search <p><i>Note: If searching by patient name, a minimum of 2 letters is required</i></p>	 <p>Home (EN) Patient Search</p> <p>Search</p> <p>Search also name(s)</p>																																																																		
<ul style="list-style-type: none"> Double Click required patient name to return patient in context <p><i>Note: If you are not a member of the patient's care team a security page will be returned and you will be prompted for a reason to access the patient record</i></p>	 <p>Whānau Tahī Patient Search</p> <table border="1"> <thead> <tr> <th>Patient ID</th> <th>Given Name</th> <th>Family Name</th> <th>Date of Birth</th> <th>Alerts</th> <th></th> </tr> </thead> <tbody> <tr> <td>ZZA5782</td> <td>ANNE</td> <td>MOUSE</td> <td>05-Jan-1950</td> <td></td> <td>Inactivate</td> </tr> <tr> <td>ZZA5051</td> <td>ARI</td> <td>MOUSE</td> <td>01-Jan-1970</td> <td></td> <td>Inactivate</td> </tr> <tr> <td>ZZA1514</td> <td>ARI 1</td> <td>MOUSE</td> <td>01-Jan-1982</td> <td></td> <td>Inactivate</td> </tr> <tr> <td>ZZA1522</td> <td>ARI 2</td> <td>MOUSE</td> <td>01-Jan-1985</td> <td></td> <td>Inactivate</td> </tr> <tr> <td>ZZA2005</td> <td>ARI20</td> <td>MOUSE</td> <td>02-Feb-1982</td> <td></td> <td>Inactivate</td> </tr> <tr> <td>ZZA2006</td> <td>ARI22</td> <td>MOUSE</td> <td>01-Jan-1975</td> <td></td> <td>Inactivate</td> </tr> <tr> <td>ZZA2013</td> <td>ARI25</td> <td>MOUSE</td> <td>02-May-1975</td> <td></td> <td>Inactivate</td> </tr> <tr> <td>ZZA1130</td> <td>ARI3</td> <td>MOUSE</td> <td>01-Jan-1987</td> <td></td> <td>Inactivate</td> </tr> <tr> <td>ZZA2080</td> <td>ARI30</td> <td>MOUSE</td> <td>01-Jan-1984</td> <td></td> <td>Inactivate</td> </tr> <tr> <td>ZZA1537</td> <td>ARI4</td> <td>MOUSE</td> <td>05-May-1985</td> <td></td> <td>Inactivate</td> </tr> </tbody> </table> <p>Showing 1-10 from 77 patients</p>	Patient ID	Given Name	Family Name	Date of Birth	Alerts		ZZA5782	ANNE	MOUSE	05-Jan-1950		Inactivate	ZZA5051	ARI	MOUSE	01-Jan-1970		Inactivate	ZZA1514	ARI 1	MOUSE	01-Jan-1982		Inactivate	ZZA1522	ARI 2	MOUSE	01-Jan-1985		Inactivate	ZZA2005	ARI20	MOUSE	02-Feb-1982		Inactivate	ZZA2006	ARI22	MOUSE	01-Jan-1975		Inactivate	ZZA2013	ARI25	MOUSE	02-May-1975		Inactivate	ZZA1130	ARI3	MOUSE	01-Jan-1987		Inactivate	ZZA2080	ARI30	MOUSE	01-Jan-1984		Inactivate	ZZA1537	ARI4	MOUSE	05-May-1985		Inactivate
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ZZA2080	ARI30	MOUSE	01-Jan-1984		Inactivate																																																														
ZZA1537	ARI4	MOUSE	05-May-1985		Inactivate																																																														
<p>Join Care Team</p> <ul style="list-style-type: none"> Select Join the Care Team Select Role Select Reason for Access Select Access Record <p>One Off record access</p> <ul style="list-style-type: none"> Select Access one off Select Reason for Access Select Access Record 	 <p>Break The Glass</p> <p>MOUSE, ARI 1(Mr) Born: 01-Jan-1982 Sex: Female NHI: ZZA1114</p> <p>Shared Care Record Access Information</p> <p>Access to this patient record is subject to the privacy obligations detailed in your National Shared Care Plan Access Deed, or the terms and conditions of your employment with your OIB (whichever is applicable).</p> <p>Access is logged for care team management and audit purposes. Patients may also be advised that you have accessed their record.</p> <p><i>Note: This will be logged into the Audit log and will be part of the standard Privacy Audit</i></p> <p>Reason for warning: Care team membership access rule violation</p> <p>Access type: <input type="radio"/> One-off Access only <input checked="" type="radio"/> Join the patient's care team</p> <p>Reason for Access: <input type="text" value="Select..."/></p> <p>Back Access Record</p>																																																																		
<p>Patient Overview page will be displayed with Active Medications, Care Team Members, Current Diagnoses and Tasks</p>																																																																			



How do I update a Patient's record in Shared Care?

Recent Activities

A view of all recent activity for the patient is available from the Recent Activity tab

- **Select** Recent Activities tab
- A list of all recent activity will be displayed by Date and User
- **Select** expand arrow to view detail of each encounter
- **Highlight** required note to view detail

Recent Activities

The 'Recent Activities' tab allows the user to document clinical interactions with the patient on a daily basis



Recent Activities – New Note

- Select **New Note**
- Select **Note Type**
- Complete **Details** fields and **Save**

Note: Note types with this icon  will be sent as a message to PMS systems

Recent Activities – New Measurement

- Select **New Measurement**
- Tick **Measurement(s)** required
- Select **Go**

- Complete measurement data
- Select **Save All**

Recent Activities – New Diagnosis

- Select **New Diagnosis**
- Document diagnosis by typing Diagnosis name in **Diagnosis** text box or selecting diagnosis from list
- Complete required fields and **Save**



How Do I Add an Assessment in Shared Care?

<ul style="list-style-type: none"> Select Assessments from the main menu 																						
<ul style="list-style-type: none"> Select New Assessment 																						
<ul style="list-style-type: none"> Select your Battery and Assessment form from the dropdown menus Follow the instructions to complete the form 																						
<ul style="list-style-type: none"> Click Save <p>'Park' saves a partially completed Assessment and you can return to it later</p>																						
<ul style="list-style-type: none"> Compare Assessment scores by selecting 'Progress'. This displays the assessments side by side to show results 	<table border="1"> <thead> <tr> <th></th> <th>29-Jan-2015 13:22:07</th> <th>29-Jan-2015 13:21:18</th> </tr> </thead> <tbody> <tr> <td>Battery</td> <td>Partners in Health</td> <td>Partners in Health</td> </tr> <tr> <td>Test</td> <td>Partners in Health Scale</td> <td>Partners in Health Scale</td> </tr> <tr> <td>1. Overall, what I know about my health condition/s is:</td> <td>2</td> <td>3</td> </tr> <tr> <td>2. Overall, what I know about my medication/s & treatment/s for my health condition/s is:</td> <td>5</td> <td>4 Something</td> </tr> <tr> <td>3. I take medications or carry out the treatments asked by my healthcare team</td> <td>3</td> <td>3</td> </tr> <tr> <td>4. I share in decisions made about my health condition/s with my healthcare team</td> <td>5</td> <td>4 Sometimes</td> </tr> </tbody> </table>		29-Jan-2015 13:22:07	29-Jan-2015 13:21:18	Battery	Partners in Health	Partners in Health	Test	Partners in Health Scale	Partners in Health Scale	1. Overall, what I know about my health condition/s is:	2	3	2. Overall, what I know about my medication/s & treatment/s for my health condition/s is:	5	4 Something	3. I take medications or carry out the treatments asked by my healthcare team	3	3	4. I share in decisions made about my health condition/s with my healthcare team	5	4 Sometimes
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How do I Create a Task in Shared Care?

Overview Screen

- A Task summary is able to be viewed from the Patient Overview Screen.

Whānau Tahī | ADAMSON, Sally | Born: 12-Sep-1954 (69y 2m) | Gender: Female | NHI: HAX136 | Known Allergies or Alerts

Tasks

Due Date	Subject	Assigned To	Created By	Status
18-Sep-2014	My Goal	Ross, Deborah	User, ABB	Reassigned
18-Sep-2014	Due date	George, Opa	Kear, Ruby	Open

Create a Task

- To create a task click 'Add New'

Whānau Tahī | ADAMSON, Sally | Born: 12-Sep-1954 (69y 2m) | Gender: Female | NHI: HAX136 | Known Allergies or Alerts

Tasks

Due Date	Subject	Assigned To	Created By	Status
18-Sep-2014	My Goal	Ross, Deborah	User, ABB	Reassigned
18-Sep-2014	Due date	George, Opa	Kear, Ruby	Open



Task Detail

- Enter the Task Detail and click 'Insert'
- By selecting the 'Publish Comment/Note to patient's Clinical Notes section' anything entered in the Comment Note field will be published to the Notes section.

Born 12-Sep-1954 (60y 2m) Gender Female

Task Detail Recurrence

Subject *

Created by Kaur, Ruby

Assigned To Select a Care Team member or start typing to search... *

Patient Adamson, Sally (HAX1736) *

Due Date

Task Type Select...

Comment/Note *

Characters remaining: 6000

Publish Comment/Note to patient's Clinical Notes section

Note Type Select... *

Select... Note message unless the

Note - Copy sent to GP

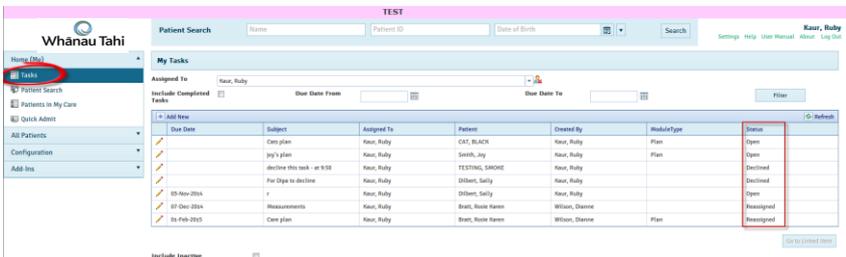
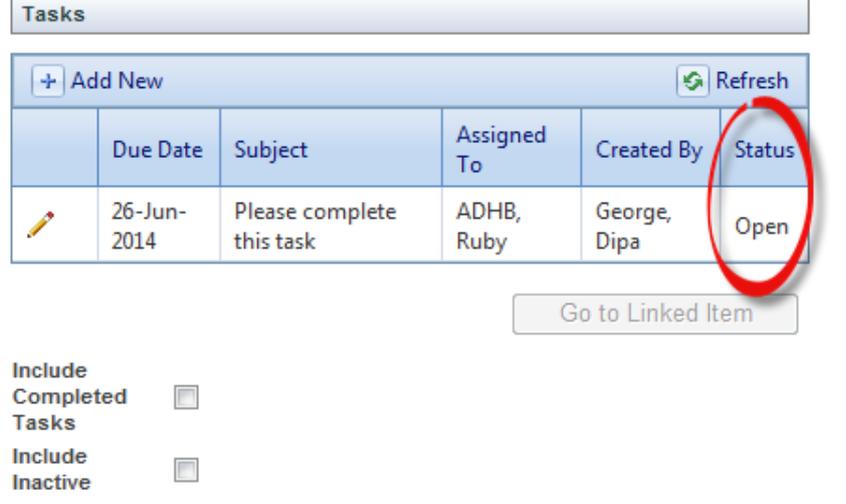
Phone Call

Note to Care Coordinator

Insert Cancel



What do I do when a task is assigned to me (and I am notified)?

<p>My Tasks Screen (for Web users only)</p> <ul style="list-style-type: none"> When you are notified of a new task, you can view all of your tasks and their status from the My Tasks summary Screen. Click on the  icon to open and edit tasks. 	
<p>For PMS and Concerto users</p> <ul style="list-style-type: none"> You will see the relevant task with Status 'Open' and Assigned To as your name. Click on the  icon to open and edit tasks. 	
<p>Task Statuses</p> <ul style="list-style-type: none"> When the  icon is selected the following screen will display with the Task having one of the displayed statuses. You can change the status of the task depending on what stage the task in, see the descriptions for general guidance on the use of each status. Simply click on the appropriate Status radio button and update the task as required. 	Empty space for content



Patient ID _____ Date of Birth _____

Task Detail Recurrence Change History

Subject *

Created by Kaur, Ruby

Assigned To Kaur, Ruby

Patient CAT, BLACK

Due Date

Task Type ▼

Task Details

Comment/Note

Characters remaining: 6000

Status Open Accepted Declined Reassigned Completed

Publish Comment/Note to patient's Clinical Notes section

Inactive

- **Open**
 - Used for submitting initial tasks, no further responses have been made and the task is as yet un-actioned.
- **Accepted**
 - Used to acknowledge receipt of a task i.e. Yes, I accept the task you sent me and will ensure it is completed in due course.
- **Declined**
 - Used to decline a task that has been submitted in error or is no longer required etc.
- **Reassigned**
 - Used to reassign a task to a more appropriate person.
- **Completed**
 - Used to close tasks i.e. the task has been completed and can now be closed.



Task Notes

- To add a Comment/Note to a task, type your note into the Comment /Note section.
- To publish the Comment/Note to the patients Clinical Notes section, check the **'Publish Comment/Note to patient's Clinical Notes section'** box.
- Type your note into the Comment/Note section.
- You are also able to select a **'Note Type'** with the available options;
 - Note
 - Note – Copy sent to GP
 - Phone Call.
- Select **Update** to save the changes.

How do I Create and View an ACP

From the Patient Overview screen Click 'Create' on **Advance Care Plan** from the **Workflow** menu.



<p>Opens a NEW window with the following message:</p> <p>Select “click here” to begin the ACP</p>	<p>Welcome to Whānau Tahi Advance Care Plan, click here to create a new one</p>
<p>Fill in all the relevant fields and other information. ‘Save’ the ACP</p>	
<p>Types of fields</p> <p>Free text field Wherever the form says “Please type here” click and type your free text answers</p>	
<p>Check Boxes</p> <p>Click in the boxes to select (tick)</p> <p>If you select a box that requires more detail, a free text box will open for you to type into.</p> <p>You can select one, many or all check boxes</p>	
<p>Radio buttons</p> <p>You can only select ONE radio button</p> <p>Choose reset selection to make both/all radio buttons empty again</p>	



Likert Scale (Or sliding scale)

Indicates how strongly you relate to the options

Click the radio button to change your option or choose reset selection to make all radio buttons empty again

Mark along the scale what you would want:

I like to know...

only the basics | | all the details about my condition and my treatment [RESET SELECTION](#)

Add a Table Row

Click the Plus icon to add a new row in a table

Click the Minus Icon to remove the last added row

My will and other important things can be found:

Document/Item	Where it is	Notes
Please type here...	Please type here...	Please type here...

[+](#) [-](#)

You can view the history of changes made to an Advance Care Plan, by clicking on the 'History' tab while viewing or editing the Plan.

The history shows who made changes, form where and what time and date changes were made

Whānau Tahi Advance Care Plan [Home](#) [History](#) [About](#) [Ross, Deborah](#) [Logout](#)

16 Oct 2017 11:27:12 - Deborah Ross
Facility: Mangere Health Centre
[view](#)

Click on the View button to see exactly what the New entry is and what the old entry was

Return to the main SharedCare record by selecting Logout

Whānau Tahi Advance Care Plan [Home](#) [History](#) [About](#) [Ross, Deborah](#) [Logout](#)

After an Advance Care Plan is saved, REFRESH the screen by either clicking on any other menu item, or click the F5 button on your keyboard

You can View or Edit the Plan by clicking on the relevant button in the Workflow window

Home (Me) ADMIT, Quick (Mrs) Born 05-Jun-1955 (59y) Sex Female /NHI MAM12S

All Patients Address Phone and email Allergies or alerts not recorded

This Patient

Overview

Recent Activities
Care Team
Notes
Assessments
Plans
Measurements
Diagnosis
Documents
Patient Portal
Consent
Programmes
Tasks
Messages
Configuration
Add-Ins

Name	Details	Role
Eaves, Sam	GP MedTech - InA Testing CMDHB	Care Team Member

Current Diagnosis

Diagnosis Description	Diagnosis Notes
No records to display.	

Workflow

Workflow	Status	View Edit
Advance Care Plan	Finalised 19-Jun-2014	View Edit

Tasks

Due Date	Subject	Assigned To	Created By	Status
13-Jun-2014	my lifestyle	George, Dipa	Kaur, Ruby	Open

Programmes

Programme	Programme Status
Shared Care Management	Enrolled 12-May-2014

Include Completed Tasks
Include Inactive



What if there was an Old ACP?

If there was a previous ACP, it will show in the Workflow window, and will stay there until a NEW ACP is created

Workflow		
Workflow	Status	
Advance Care Plan (old version)	Updated 26-Jun-2017	View
Advance Care Plan	-	Create

After refreshing the screen (F5) the OLD ACP will move into the Documents module and will remain there

Click the View button to open the Old ACP

Type	Status	Name	Description	Category	Added on	Added by
pdf	Final	Advance Care Plan - original id - 4cee7ff6-b621-4070-8eb6-74c8af0f4837	Snapshot from 11-Oct-2017	Assessment	11-Oct-2017	

How Do I Give Patients' Access to their Portal, Measurements and Resources?

Patient Portal, Measurements, Resources

- Check the box and enter patients personal email address
- Select measurements you wish the patient to be able to view and add from within the portal
- Select the Resources from the library you wish to make available to your patient via the portal

How Do I Opt-in for Messaging with Patients?

Patient Messaging

- Enable patient messaging via settings on the top right of your menu bar
- Select My Message Access Settings
- Select patient or multiple patients with portal access that you agree to message with and save



- Messaging enabled
-
- Similarly messaging for patients can be removed by highlighting patient and selecting opposite arrow