# Shared Care User Manual

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# How do I Access a Patient from Concerto?

## Patient Search
- Search for a patient using their NHI number.

## Patient Details
- From the Shared Care Record section click on 'View'

## Shared Care Snapshot Summary
- 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 patient is enrolled in MASS (pharmacy programme) this will display underneath the Care Team

## Launching Shared Care
- Select the SHAREDCARE Icon from the top right hand Concerto menu.

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**Patient Search**

<table>
<thead>
<tr>
<th>Search Criteria</th>
<th>NHI</th>
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**Patient Details**

<table>
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<tr>
<th>Patient Details</th>
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**Shared Care Snapshot Summary**

<table>
<thead>
<tr>
<th>Care Plan</th>
<th>Personalised Care Plan</th>
<th>Advance Care Plan</th>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Care Team</th>
<th>Designation</th>
<th>Facility</th>
<th>Organisation</th>
<th>Care Team Role</th>
<th>Contact Details</th>
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<tr>
<td>Ross, Deborah</td>
<td>Support Regional Shared Care</td>
<td>Care Coordinator</td>
<td>Telephone: 0800268626</td>
<td></td>
<td></td>
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<tr>
<td>Curell, Andrea</td>
<td>Standard Designation ProCare</td>
<td>Care Team Member</td>
<td></td>
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<tr>
<td>Eaves, Simon</td>
<td>GP Med Tech - JRA Testing</td>
<td>Care Team Member</td>
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<table>
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<tr>
<th>MASS Pharmacy</th>
<th>Name</th>
<th>Contact Information</th>
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<td>Regional Shared Care</td>
<td>Telephone: 0800268626</td>
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**Diagnoses**

<table>
<thead>
<tr>
<th>Category</th>
<th>Look For</th>
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**Security Challenge Screen**
- The Shared Care program is launched in Context.
- Select ‘Join Care Team’ or ‘One-off access’
- Click Access Record

**Shared Care Program**
- The Patient Overview Screen is then displayed in WTCC.
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.

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

Login to Shared Care
- Enter your Shared Care Password
- Click Log In

Shared Care Program Screen
- The Patient Overview Screen will show in context.
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.

Shared Care Program Screen
- Select Submit Batch Update
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’

- The Patient Summary Screen is then displayed in the Shared Care Program.
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 filter within this field.

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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

Select ‘ARI – General Practice Only’ or ‘Palliative – General Practice Only’

All the fields are Auto filled

Click on ‘Save’ to enrol the patient in the ARI Programme
How do I Disenroll a patient from an ARI/Palliative Care Programme?

From the Patient Overview screen select ‘Programmes’

Click on the row that shows the Programme from which to disenroll the patient.

Select ‘Disenroll ’ from the drop down menu.

Select ROUTINE and then choose the ‘Reason’ for disenrollment and click on Save.

How do I add to the Care Team?

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.
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

How do I Create a Care Plan?

From the Patient Overview page select the ‘Plans’ tab
Select the Create button
Choose 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**
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)

### WTCC Login
- Type the following URL in your Internet Explorer browser
  - HTTP://nscp-ccms.connected.health.nz/
- Enter your username, password and click ‘Login’

### Patient Search
- Type in the Patient Name, Patient NHI, or DOB of the patient
- Select Search

**Note:** If searching by patient name, a minimum of 2 letters is required

- Double Click required patient name to return patient in context

**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

### Join Care Team
- Select Join the Care Team
- Select Role
- Select Reason for Access
- Select Access Record

### One Off record access
- Select Access one off
- Select Reason for Access
- Select Access Record

### Patient Overview page will be displayed with Active Medications, Care Team Members, Current Diagnoses and Tasks
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?

1. **Select Assessments from the main menu**
2. **Select New Assessment**
3. **Select your Battery and Assessment form from the dropdown menus**
4. **Follow the instructions to complete the form**
5. **Click Save**
   - ‘Park’ saves a partially completed Assessment and you can return to it later
6. **Compare Assessment scores by selecting ‘Progress’**.
   - This displays the assessments side by side to show results
How do I Create a Task in Shared Care?

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

Create a Task
- To create a task click ‘Add New’
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.
What do I do when a task is assigned to me (and I am notified)?

### My Tasks Screen (for Web users only)
- 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 **edit** icon to open and edit tasks.

### For PMS and Concerto users
- You will see the relevant task with Status ‘Open’ and Assigned To as your name.
- Click on the **edit** icon to open and edit tasks.

### Task Statuses
- When the **edit** 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 is 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.
- **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.

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**How do I Create and View an ACP**

From the Patient Overview screen Click ‘Create’ on Advance Care Plan from the Workflow menu.
Opens a NEW window with the following message:
Select “click here” to begin the ACP

Fill in all the relevant fields and other information. ‘Save’ the ACP

Types of fields

Free text field
Wherever the form says “Please type here” click and type your free text answers

Check Boxes
Click in the boxes to select (tick)
If you select a box that requires more detail, a free text box will open for you to type into.
You can select one, many or all check boxes

Radio buttons
You can only select ONE radio button
Choose reset selection to make both/all radio buttons empty again
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

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

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
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

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
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.

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.

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
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<tbody>
<tr>
<td></td>
<td>• Messaging enabled</td>
</tr>
<tr>
<td></td>
<td>• Similarly messaging for patients can be removed by highlighting patient and selecting opposite arrow</td>
</tr>
</tbody>
</table>

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