



**CareConnect**  
**Chrion Phase 2 Initial Deliverables**  
**Functional Specification**  
**Release 2.1.2**

**Version 3.4**

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# 1 Introduction

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This document provides details of the new functionality released in release 2.1.2 of the CareConnect eReferrals forms.

## Core Form – Previously Referred

### 1.1 'Seen by DHB' CareConnect dropdown

For CareConnect forms only add a new dropdown box to the Previously Referred section of the generic clinical form called 'Seen by DHB?' - field mandatory if displayed.

Dropdown values: ADHB; CMDHB; WDHB; Other

Where 'Other' is selected a 60 character free text field 'Please specify' to display - field mandatory if displayed.

Mock-up:

Previously Referred

Has patient been previously referred for this condition?

Seen by DHB?\* Other Please specify\*

Previous consultant Date of previous referral

Previous referral comments

### 1.2 Referral Sub header - Patient & referrer contacts numbers

A number of services (across DHB's, across NZ) predominantly use the first page of the print view as their main referral page. To avoid duplication of processes, the requirement is to add the following detail to the sub-header in the print view (across the whole product)

- Patient: Phone number(s)
- Referred by: Phone number(s); fax number

**Patient:** JOHNNY LABTEST, 34yrs, NHI ZZZ9994, M, DOB 01/01/1978  
22 Teed Street, Newmarket, Auckland 2016

**Referred by:** Sam Entwistle, Millstone Family Practice, NZMC A7755-3

## 2 Remove / Add Generic forms

### 2.1 Paediatric ORL

Add new service for 'Paediatric ORL' with Generic form under the Paediatric's parent:

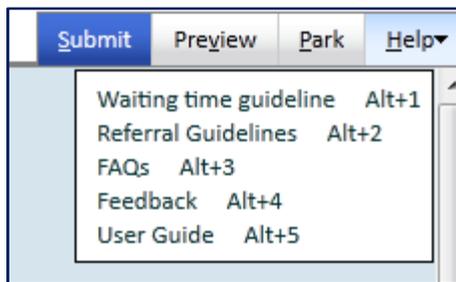
Service Code	Service & Label	Parent	Template
417887005	Paediatric ORL	Paediatric's	CareConnectGeneric

### 2.2 Gastroenterology – Gastro Clinic

Remove this generic form

## 3 Facility driven new Help Menu Item

For ADHB ONLY a new help menu item to be added to the help menu called 'Waiting time guideline' (appears before the 'Referral Guidelines')

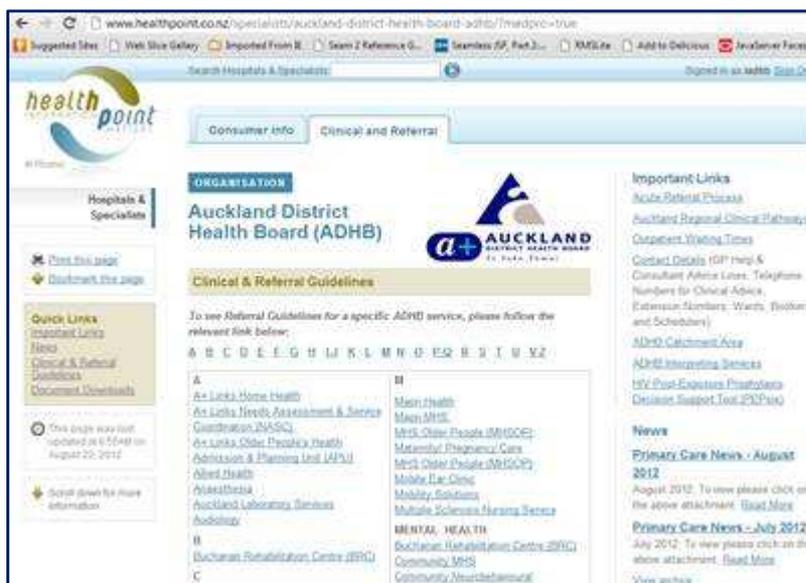


Note menu item should be in camel case

The link for this help menu item is:

<http://www.healthpoint.co.nz/partner,iadhb,wFKmc0Aoih.do?next=default,120799.sm?medpro=true>

This will navigate the user to the main HealthPoint page where they can then click on 'Outpatient Waiting Times' to open these.



## 4 Dynamic Change Forms Links

Commonly the user will go down a clinical pathway in a form that means they should actually be referring to another service (and therefore using another form).

Where this occurs a link should be presented that will

- Be formatted like a hyperlink
- Reload the relevant template
- All the core information and including "Referral details" need to be transferred to new form
- If the user does not click on the link when it is displayed, the 'Submit' should be disabled unless of course the options / criteria are changed to different outcome

Specific for the 2.1.2 release is this in the Vascular form (Reason for referral Carotid artery disease/suspected') the user is presented with the message "Please refer using the TIA form" there should be link directly to the TIA form rather than have to start from scratch again.

## 5 Consultation Notes

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This section of the document defines the requirements for the functional extension of the existing 'Consultation Notes' capability in the core form where the user can drop the 'Last consultation notes' into the 'Referral Details' rich text box (on specialist templates) or 'Relevant history & physical examination findings' rich text box (on generic form). These changes apply to all services and templates.

The following requirements extend on this behaviour to allow the user to add multiple consultation notes from any date in the Patient EMR.

**Note: The multiple consultation notes functionality is released in Forms release 2.1.2, however it requires counterpart changes in the EMR systems to feed the consultation notes data to the form. The supporting EMR releases are Medtech 20.8 and the MyPractice March release. In the absence of these EMR releases the form will continue to bring through only the last consultation note.**

### 5.1 Browse Consultation Notes

The 'Last consultation Notes' button (icon) and functionality will no longer be required for the CareConnect implementation.

A new button will be added next to the 'Referral Details' rich text box (or 'Relevant history & physical examination findings' on generic templates) called 'Browse for Consultation Notes'.



Referral details  Browse for Consultation Notes

The selection of this button will launch the 'Browse Consultation Notes' Light box

### 5.2 'Browse Consultation Notes' Light box

The 'Browse Consultation Notes' light box is required present the user enough information in a generic format to select the notes required correct notes for inclusion with the referral.

As there is a variation between EMR's in the way consultation notes are recorded, the information will be queried as in the standardized 'S.O.A.P.P' format. Currently Medtech can only response to the single concept but in future are moving towards the SOAP format (which My Practice already adheres to).

HLK will query the 5 individual S.O.A.P.P concepts and concatenate the data into one row in the table below 'Consultation Notes'. This will cater for My Practice current implementation AND Medtech's new implementation.

Only consultation notes text is expected - not all associated issues i.e. classification, ACC record etc.

Each 'Consultation Notes' row will display the first 100 characters from the each of the concatenated Patient consultation notes.

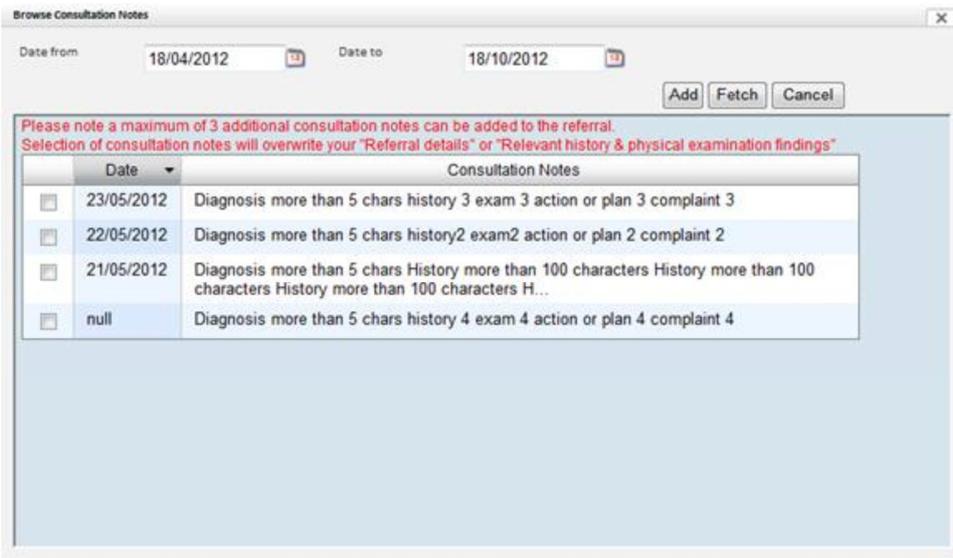
The concatenation will be ordered by:

1. Assessment
2. Subjective
3. Objective
4. Plan
5. Presenting Complaint

Consultation notes from the 6 months will pre-populate on launch of browse light-box

Mapping between SOAP and My Practice Consultation notes fields is:

- Subjective = History
- Objective = Exam
- Assessment =Diagnosis
- Plan = Action
- And, additionally we will query 'Presenting complaint'
- User selects the applicable medications by checking the row (first column) and selecting 'add'



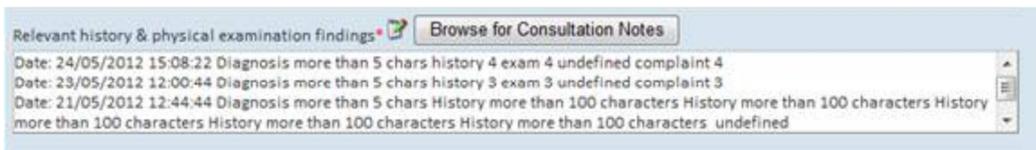
### 5.2.1 Restricting the number of Consultation Notes

To avoid excess information in the referral the users will be restricted to adding a maximum of 3 sets of consultation notes to the referral, achieved by:

1. A messages on the browse light box (as in mock-up above):
  - Please note a maximum of 3 additional consultation notes can be added to the referral.
  - Selection of consultation notes will overwrite your 'Referral details' or 'Relevant history & physical examination findings'
2. User will be restricted to the selection of 3 sets of consultation notes in browse light box
3. If the user re-opens the browse light box:
  - a. Previously selected notes will be checked
  - b. If note selection is changed, all the 'Referral Details' text will be overwritten with the new notes

### 5.3 Return Consultation Notes to the form

Once the required consultation notes are selected, the text will be presented (new line for each set of consultation notes) into the Referral Details' rich text box (or 'Relevant history & physical examination findings' on generic templates) which displays the selected notes.



Once consultation notes selected additional free text may be entered into the Referral details box. The consultation notes will be sent to the recipient as a part of the 'Referral Details' information.

### 5.4 Present Consultation Notes in Print view

There is no change required to the current presentation of consultation notes in the print view of the form.

## 5.5 'Consultation Notes' Configurability

Functionality to be configurable by customer – can add the 'Browse for Consultation' notes button and functionality to any nominated Rich text box on Clinical Information Tab.

## 6 Other Medications

This section of the document defines the requirements for the functional extension of the existing 'Medications' tab in the core form. These changes apply to all services and templates

The requirement is to be able to browse back into the EMR and add any additional medications (that are not already in pre-populated list to a new 'Other Medications' table.

### 6.1 Long Term Medication Table

The pre-populated of the 'Long Term' medications will stay the same – medications last prescription date in the last 6 months.

### 6.2 Browse for more Medications

On the 'Medications / Warnings' tab;

- a new header for 'Other Medications' will statically appear below the 'Long Term Medications' table
- Information Help for 'Other Medications' Header:
  - 'Additional Medications relevant to this referral'
- 'Browse for other Medications' button which will open 'Browse Medications' light-box

**Long Term Medications**

Date	Details	Dose	Units	Instructions	
20/10/2011	ERGOMETRINE MALEATE 0.5mg/1ml; OXYTOCIN 5IU/1ml	1.0	vials	1 vials, Every Four Hours	✗
20/10/2011	CHOLECALCIFEROL	10.0	tabs	10 tabs, Every Four Hours	✗
20/10/2011	BENZALKONIUM CHLORIDE 0.05%; PANTHENOL 5%	100.0	g	100 g, Every Four Hours	✗
20/10/2011	PARACETAMOL	12.0	mls	12 mls, Four Times Daily	✗
27/04/2011	RITALIN LA CAPSULES	20.0	caps	20 caps, Four Times Daily	✗
28/03/2011	MIANSERIN HYDROCHLORIDE	30.0	tabs	30 tabs, Twice Daily	✗

**Other Medications**

**Medical Warnings**

<input type="checkbox"/>	Date	Description	Comments
<input checked="" type="checkbox"/>	11/10/2011	Allergic to bees	
<input checked="" type="checkbox"/>	27/04/2011	Abetimus	
<input checked="" type="checkbox"/>	06/04/2011	Acetone	
<input checked="" type="checkbox"/>	28/03/2011	Aceclidine	

**Medication Comments and Medical Warnings**

### 6.3 'Browse Medications' Light-box

Once the 'Browse for more Medications' button is selected the 'Browse Medications light-box will be launched:

- Query the 'Patient\_PrescribedMedication' concepts
- All Medications (including Long Term) will pre-populate on launch of browse light-box (date range defaulted to past 6 months)
- User selects the applicable medications by checking the row (first column) and selecting 'add'

Browse Other Medications

Date from: 03/03/2011 Date to: 02/03/2012

Add Fetch Cancel

<input type="checkbox"/>	Details	Dose	Units	Instructions
<input type="checkbox"/>	ERGOMETRINE MALEATE 0.5mg/1ml; OXYTOCIN 5IU/1ml	1.0	vials	1 vials, Every Four Hours
<input type="checkbox"/>	CHOLECALCIFEROL	10.0	tabs	10 tabs, Every Four Hours
<input type="checkbox"/>	BENZALKONIUM CHLORIDE 0.05%; PANTHENOL 5%	100.0	g	100 g, Every Four Hours
<input type="checkbox"/>	PARACETAMOL	12.0	mls	12 mls, Four Times Daily
<input type="checkbox"/>	RITALIN LA CAPSULES	20.0	caps	20 caps, Four Times Daily

### 6.4 'Other Medications' Table

Once the additional medications are selected – a new table called “Other Medications” to be dynamically rendered ‘Long term medications’ table:

- Columns: Date; Details; Dose; Units; Instructions
- Ability to add an empty row using the ‘+’ button

HealthLink Online

**General Medicine Referral for Outpatient Appointment**

**AUCKLAND**  
Auckland District Health Board

**Clinical Information**  
No referral information provided

**Attachments / Reports**  
No reports selected  
No files attached

**Medications / Warnings**  
6 long term medications specified, 4 medical warnings specified

**Medical History**  
Medical history specified

**Patient Disabilities**  
No disabilities specified  
No mobility issues specified

**Patient Information**  
MARTHA MEDTECH X MOORE, 32yrs  
FVE7188

**Administration Details**  
Auckland DHB  
Outpatient Appointment  
Eligible

**Referrer Details**  
Referred by Sam Entwistle  
Millstone Family Practice  
NZMC A88984-3

**Long Term Medications**

Date	Details	Dose	Units	Instructions	
20/10/2011	ERGOMETRINE MALEATE 0.5mg/1ml; OXYTOCIN 5IU/1ml	1.0	vials	1 vials, Every Four Hours	+
20/10/2011	CHOLECALCIFEROL	10.0	tabs	10 tabs, Every Four Hours	×
20/10/2011	BENZALKONIUM CHLORIDE 0.05%; PANTHENOL 5%	100.0	g	100 g, Every Four Hours	×
20/10/2011	PARACETAMOL	12.0	mls	12 mls, Four Times Daily	×
27/04/2011	RITALIN LA CAPSULES	20.0	caps	20 caps, Four Times Daily	×
28/03/2011	MIANSERIN HYDROCHLORIDE	30.0	tabs	30 tabs, Twice Daily	×

**Other Medications** [Browse for other Medications](#)

Date	Details	Dose	Units	Instructions	
20/10/2011	ERGOMETRINE MALEATE 0.5mg/1ml; OXYTOCIN 5IU/1ml	1.0	vials	1 vials, Every Four Hours	+
20/10/2011	CHOLECALCIFEROL	10.0	tabs	10 tabs, Every Four Hours	×

**Medical Warnings**

<input type="checkbox"/>	Date	Description	Comments
<input checked="" type="checkbox"/>	11/10/2011	Allergic to bees	
<input checked="" type="checkbox"/>	27/04/2011	Abetimus	
<input checked="" type="checkbox"/>	06/04/2011	Acetone	
<input checked="" type="checkbox"/>	28/03/2011	Aceclidine	

**Medication Comments and Medical Warnings**

## 6.5 'Other Medications' Configurability

Functionality to be configurable by customer – can add the 'Browse for Other Medications' button and functionality to 'Medications / Warnings' tab as required.

## 7 Minor Form Changes

Service / Form	Change	Mock-up
<b>Audiology</b>	Remove field(s): <ul style="list-style-type: none"> <li>"Examination Findings" from Adult and Paeds section</li> </ul>	Yes
<b>Breast</b>	Remove field(s): <ul style="list-style-type: none"> <li>"Investigations and report details" rich text box from under " Investigations / Results to be attached"</li> </ul>	Yes
<b>Audiology</b>	Remove field(s): <ul style="list-style-type: none"> <li>"Examination Findings" from Adult and Paeds section</li> </ul>	Yes
<b>Gen Surgery Breast</b>	Remove field(s): <ul style="list-style-type: none"> <li>"Investigations and report details" rich text box from under " Investigations / Results to be attached"</li> </ul>	Yes
<b>Gen Surgery Other</b>	Remove field(s): <ul style="list-style-type: none"> <li>"History"</li> <li>"Examination and Investigations"</li> </ul>	Yes
<b>Gen Surgery: Upper GI / HPB: Bariatric</b>	Remove field(s): <ul style="list-style-type: none"> <li>"Examinations (subheader)"</li> <li>"Bariatric investigation"</li> </ul>	Yes
<b>Ophthalmology</b>	Add field(s): <ul style="list-style-type: none"> <li>"Visual Acuity" as a heading above the section "with distance glasses" etc</li> </ul>	Yes
<b>ORL</b>	Remove field(s): <ul style="list-style-type: none"> <li>"Presenting complaint"</li> <li>"Treatment to date and past ORL history"</li> <li>"Clinical features"</li> </ul>	Yes
<b>Paediatrics Service Group Rename</b>	Please rename the Paediatric Service Group Paediatrics <ul style="list-style-type: none"> <li>Paediatric Cardiology</li> <li>Paediatric Medicine</li> <li>Paediatric ORL</li> <li>Paediatric Orthopaedics</li> <li>Paediatric Surgery: Urology, Thoracic, GI/HPB</li> <li>Paediatric Radiology</li> </ul> <p><b>Note:</b> CD of Paed Surgery James Hamill has requested form name change from 'Paediatric Surgery and Urology' to 'Paediatric Surgery: Urology, Thoracic, GI/HPB'.</p>	

	ADHB service only	
<b>Skin cancer: Non-pigmented</b>	Remove field(s): <ul style="list-style-type: none"> <li>• "biopsy detail ..." (biopsy available)</li> <li>• "Suspected diagnosis detail..." (biopsy not available)</li> </ul>	Yes
<b>Skin cancer: Pigmented</b>	Remove field(s): <ul style="list-style-type: none"> <li>• "Please provide details whether...." ( Melanoma Which Has Been Excised</li> <li>• Suspected melanoma details... ( suspected melanoma)</li> </ul>	Yes
<b>Womans Health: – Gynae</b>	Remove field(s): <ul style="list-style-type: none"> <li>• "Relevant gynaecology or colposcopy history including gynae surgeries"</li> <li>• "Examination finding"</li> <li>• "Other relevant results" – all dropdowns</li> <li>• "Severity of symptoms" " – all dropdowns</li> <li>• "Medications" – physio reason for referral</li> </ul>	No