

#### **Shared Care User Manual**

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#### How do I Access a Patient from Concerto?

<ul> <li>Patient Search</li> <li>Search for a patient using their NHI number.</li> </ul>	Singhc   Search Criteria   Help   Home   NHI   Logout   Concerto   Patients   Search Results
<ul> <li>Patient Details</li> <li>From the Shared Care Record section click on 'View'</li> </ul>	1970 M)       Clinical Documents         View By Category Look For         Patient Details         Merged NHIS         Net HUX8660         Name       MOUSE, Mickey         Sex       M         DOB       08-Oct-1970         Age       41         Address       12B Waitomo St, , Onehunga, Auckland 1061         Shared Care Record         Mobile       Not Available         GP Name       None         GP Address       Test Address For Leonie         GP Phone       No Address
<ul> <li>Shared Care Snapshot Summary</li> <li>The Care Plan Summary details from the PMS are displayed as a PDF.</li> <li>The Snapshot view presents both the Personalised Care plan and the Advance Care Plan (if one exists)</li> <li>If there is a named Care Coordinator, their associated practice phone number will display</li> <li>If the patients is enrolled in MASS (pharmacy programme) this will display underneath the Care Team</li> </ul>	Summary - Please click links to view details         Patient Plan - Personalised Care Plan       Last Modified Date: 24-Apr-2015 11:14         Advance Care Plan       Care Team         Name       Designation   Facility         Care Team Role       Contact Details         Name       Organisation       Regional Shared Care         Care Coordinator       Telephone       0800268626         Number:       Curlew, Andrea       Standard Designation   ProCare         Care Team Member       0800268626         Curlew, Andrea       Standard Designation   ProCare         Care Team Member       0800268626         MASS Pharmacy       Mame       Contact Information       Regional Shared       Telephone       0800268626         Mane       Contact Information       Regional Shared       Telephone       0800268626         Name       Contact Information       Regional Shared       Telephone       0800268626         Care       Number:       0800268626       Diagnoses       Back to Top
<ul> <li>Launching Shared Care</li> <li>Select the SHAREDCARE Icon from the top right hand Concerto menu.</li> </ul>	→ ♥ Clinical Documents Category ▼ Look For ■♥ ■! Clear

NG D									
<ul> <li>Security Challenge Screen</li> <li>The Shared Care program is launched in Context.</li> <li>Select 'Join Care Team' or 'One-off access'</li> <li>Click Access Record</li> </ul>	Shared Care Record Access to this patient rec employment with your D Access is logged for care Note : This will be logged Reason for warning Access type Reason for Access	Access Informa ord is subject to the HB (whichever is ap team management <i>into the Audit log a</i> Care team mer © One-off Ac Select	tion privacy obligations detailed plicable). and audit purposes. Patient: <i>and will be part of the stande</i> mbership access rule violatic cess only () Jog the patien	in your National SI s may also be advis ard Privacy Audit on t's care team	hared Care Plan / ed that you have	Access Deed, or	the terms a record.	and condition	ons of your
	Whānau Tahi	ADAMSON, Sally	Born 12-Sep-1954	(60y 2m) Gender Female Snown Allergies or Alerts	,	NH	HI HAX1736	Settin	Kaur, Ruby Igs Help User Manual About Log Out
<ul> <li>Shared Care Program</li> <li>The Patient Overview Screen is then displayed in WTCC.</li> </ul>	Comprove     Comprove Activities     Compress Activities     Compress Activities     Marce Activities     Marce Activities     Marce Activities     Monormatics     Monormatics     Documents     Compress     Compress     Programmes     Programmes     Marce Activities     Monormatics     Monormatics     Monormatics     Compress     Monormatics     Monormatics	Patient Overview  Prescription  I a data  Cont  Cont  Provide Segmentaria UP myS  a data  Area  Area	Desage and Directions Daily	Deer Presched 29-Nev-2014 Cerr Team Member Geer Team Member Cerr Team Member Cerr Team Member	Current Diagnosis  Current Diagnosis  Current Diagnosis  Current Answe Composite Secretaria  Current Current  Current Current  Current Current  Current Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Current  Curr	ess s neutona ligitadi Dur deal Dur deal Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitadi Ligitad	Diagnosis 1 I nover fills finding to the second sec	Notes ed out notes to set h res it may excound or second by Created By User, All Rear, Roby	ere ti djaget ti di in The set of 1

## How do I Enrol a Patient from MedTech?





Patient Details Screen	MedTech-32 HSAGlobal Limited [Terminal]	Western Units	
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<ul> <li>The Patient details are displayed.</li> <li>Click Submit Enrolment to</li> </ul>	TEST Patient (130537.1)	A 3 - R EES2309 05 May 1955 59 yrs Male	SFE A-!
	New Shared Care Encolment (My Encore)		
complete the patient enrolment.	Main web More Audit		
	CCMS - Shared Care	₩	
	Please review and submit if enrollment details are cor	rrect	
	Data Preview		
	Enrol To Shared Care Management	^	
	NHI EES2309		
	+ Patient Details	E	
	Screening:		
	+ Blood Pressure 9-DEC-2014		
	Diagnosis:		
	+ Hay fever - unspec allergen 9-DEC-2014		
	Medical Warning:		
	Expand/Collapse All		
	Comments		
	Submit Enrollment		
	MedTech-32 HSAGlobal Limited [Terminal]		
	File Edit Patient Module Report Tools Utilities Setup ManageMyHealth ConnectedCare CAT Win		
Enrolment Confirmation		i 🗟 🗟 🖌 🖾 🕑 🖻	
• The following message will display	TEST Patient (130537.1)	A 3 - R EES2309 05 May 1955 59 yrs Male 0.00	SFE A-! RP
confirming the enrolment has been	New Shared Care Enrolment (My Forms)		
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completed.			
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	processing to complete you can close this form. The system will still continue to you with this form. The outcome of the request will be sent to you you and you with this form. The outcome of the request will be sent to you you and you with this form. The outcome of the request will be sent to you you and you with this form. The outcome of the request will be sent to you you and you with this form. The outcome of the request will be sent to you you and you with this form. The outcome of the request will be sent to you you and you have been you have	wish to wait for the p process your request if p FDI mercane	
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	1.111	11	



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





## How do I complete a Batch Update from MedTech?





## How do I Enrol a Patient from MyPractice?

Patient Details	10 My Practice - 14.10.5396.1587 Marcus Weby File View Tools Accounts Help 💿 🐧 📷 🛐 👔 🍐 🌰 🚍 🚮 🐼 🕹 🛼 🙀 74 🍆 💏 📞 😱
<ul> <li>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</li> </ul>	Manage         New Appoint         Paster         New Account         Addition         Count         Counter
<ul> <li>Patient Notes Screen</li> <li>Successful enrolment message is returned</li> <li>Note: It might take a few minutes for the enrolment to be completed in WTCC</li> </ul>	Anno Shanad Care (CMS)     Shared Care



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

Patient Details	Ber	ngali Acrobat Acrobat Acrobat	10/10/198 25,0000 25,000 25,0000 25,0000 25,000 25,0000 25,0000 25,0000 25,0000 25,0000 25,0000 25,0000000000	7 7 7	ovzura rucou a. 💌 j Consultation 🔹			
• From the Patient Notes screen select	Hor	Hegular Demo me Address, 343 Manukau Road, I	GFA8999 259.6m Epsom Ph: 3333(Home)	Marcu	us Welby Welby, Marcus	Ξ.		
Forms	Auki × Simmi      Presenting Complaint Attachment      Action Diagram Attachment							
From the Forms many select (CCMS)	History DOC: Patient details sent to HSA							
from the forms mend select <b>Cewis</b>	Exam Exam							
	Diagnosis							
	Ns	otes Results Measurements	Scripts Lab Badiol Ca	ardiol   Endo   Audio   Letters Eorms Immu	unisations			
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		Clinical Forms Clinical Forms Cardio Vascular Bisk	Child Check Child Check	ACC CCMS Acc	C Treatment Profiles the Education Slide Show			
		Diabetes 4Y Well Sastroenteritis 5M Well	Child Check Child Check	COPD Ame CVD Anne	ecia Education Slide Show erican Family Physician iety and Panic Internet Resource			
		Questionnaires 6W Well Abuse - 1 Ace Inhibit	Child Check Domestic	DEP ARE DIABETES Ath OTHER	DS witis Education Slide Show			
		Acne Acute As	thma	Predict Astr Astr	hma allergy and Immunology hma and Respiratory Foundation hma Education Slide Show			
The Patient Summary Screen is then								
displayed in the Shared Care Program	2	Notes Assaunt Auto	havit Mail Parulte See	🔒 📦 🎢 🂊 😤	Contacto Scrap Book			
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	ľ	Address http://ccms-nscp	preprod hsaglobal net/Encour	nters/PatientOverview.aspx		Show List Cance	I Close	
			NFW Patient	Born 05-May-1955 (59y 7m)	Gender Male NHI FTY	(9015 Welt	y, Marcus	
		Whānau Tahi	,	🛞 No Allergies or Alerts Rec	orded	S User M	ettings Help anual About	
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		Overview     Overview     Recent Activities	Patient Overview	1				
		Care Team	Prescriptions		Current Diagnosis			
		Notes	Add New		+ Add New			
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		🦃 Plans	Nor	ecords to display.	Hay fever (H172)		Notes	
		Measurements					=	
		Uiagnosis     Ry History						
		Documents						
		Patient Portal			I			
	Care Team							
	Service Servic							
		📑 Tasks	Name	Details	Add New	Accionad	S Refresh	
		Messages	weiby, Marcus	GP   MyPractice - hA Testing   CMDHB	Due Date Subject	To Created By	Status	
					No records	s 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.

rubyk 2 Help 🏟 Home					TEST			
Logout Patients	Whānau Tahi	Patient Se	arch	Name	Patient ID	Dat	e of Birth	
Approval	Home (Me)	Patient Se	arch					
Resources Personal	I Tasks	Please enter	the search criter	a in the Patient Search bar abov	•			
Apps Home Page Med Rec Searches Task Manager	Patient Search Patients In My Care							
Worklists Clinical Reporter	All Patients	*						
Middlemore Central	Configuration	•						
Dashboard Shared Care	Add-Ins	*						
(HSCS)	Ŀ,							

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



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





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

From the Patient Overview screen select 'Programmes'	TEST       TEST, PATIENT (Mr)     Sum 05-Maj 1050 (or Mail       Manau Tahi       New (Mr)       A family fami
Click on the row that shows the Programme from which to disenroll the patient.	Inter (Mg)         TEST, PATIENT (Mg')         Bare 05 May 1955 (Mg / Pa)         Control Mate         Nill ELS200 Bare Database         Example may Leave and the main of the mai
Select 'Disenroll ' from the drop down menu	Instruction     Notifier Device     Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device Device
Select ROUTINE and then choose the ' <b>Reason</b> ' for disenrollment and click on <b>Save</b>	Hone (Me) Hone (

#### How do I add to the Care Team?

From the Care Plan page, select ADD and	Whānau Tahi	DOOR, Corri Born 08-May-1973 ( (Mr) & No Allergie	<b>62y Om)</b> Ger as or Alerts Recorde	nder <b>Male</b> ed	NHI NEY	7477 Se Details ▼	<b>Kaur, I</b> ettings Help User M About InterRAI Lo	<b>Ruby</b> anual og Out
type the name of the person in the Member	Home (Me)	Care Team						
box. Choose from the list.	All Patients *	~						
	This Patient	Current Past Remove Edit Add	Member	sarah			<mark>∞</mark> & ∗	_
		<b>U</b>	Role	Name	Organisation	Facility	Designation	
	Recent Activities	Summary	Start date					*
Choose the <b>Role</b> .	Care Team	Koss, Deboran - Care Coordinator started on 20- May-2015 Clinical Pharmacist   Regional Shared Care   Shared Care Programme	Notes	Tibby, Sarah	Shared Care Programme	Regional Shared Care	Support	=
	Notes	🖀 Eaves, Sam - Care Team Member started on 20-May		Eaves, Sam	CMDHB	MedTech - hA Testing	GP (Care Team Member)	-
	S Plans	-2015 GP   Mangere Health Centre   CMDHB		Eaves, Sam	CMDHB	Mangere Health Centre	GP (Care Team Member)	
CIICK Save	Measurements			Kaur, Ruby	Shared Care Programme	Regional Shared Care	Support (Care Team Member)	
	② Diagnosis				+ Total 5 r	natching results		-
	① Rx History							
	Documents							
	🚨 Patient Portal							
	🔛 Consent		1					
	Member Tibby, Sarah							
	Role Select	*						
	End date Care Coordin	nator						
	Notes Care Team							



Edit a Care Team Member:	Care Team	
You can remove members or change roles.	Current Past Remove Edit Add	Member name Tibby, Sarah Role Care Team Member Start date 20-May-2015
Highlight the member by clicking on the name.	Summary Ross, Deborah - Care Coordinator started on 20- May-2015 Clinical Pharmacist   Regional Shared Care   Shared Care Programme	End date - Notes -
Choose to Remove to take off the team, or Edit to change the Role. Click Save	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	Inactive

## How do I Create a Care Plan?

From the Patient Overview page select the 'Plans' tab	Whānau Tahi	DOOR, C (Mr)	orri 08-May & <sup>†</sup>	Born Gender Male -1973 (42y Om) Io Allergies or Alerts Recorded	NHI <b>NEY7477</b> More Details	Kaur, Ruby Settings Help User Manual About InterRAI Log Out
Select the Create button	Home (Me)  Patient Plans					
	All Patients 🔻					Crosto Ed
Choose Personalised Care Plan	This Patient					My Medicines ×
choose reisonalised care rian	Overview	Name		Plan Type	Created By	Adherence Plan
	C Recent Activities	No records to dis	alav.	A	Y	Care Plan
	Care Team					
	assessments					
	😵 Plans					
	Measurements					
	Diagnosis					
The Personalised Care Plan opens with 3	Q	DOOR, C	orri (Mr)	Born	NHI NEY747	7 Kaur, Ruby Settings Help User Manual
core components at the top. 'About Me'.	Whanau lahi		08-May-1 Gender Mal	973 (42y 0m)		About InterRAI Log Out
'What Matters to Me' and 'My Goal'			8	No Allergies or Alerts Recorded	More Details	•
what matters to me and my court.	Home (Me)	History	Print Savo		More Details	
The supervise also as an existe ONE the disc	All Patients		June Duve			
The program also opens with ONE Heading	This Patient 🔺	Perso	nalised Care	Plan		
named : <b>Heading</b> : Things I Will Do	Overview	Last modifie	d by: on 20-May-2015	i tan		
	C Recent Activities	About M				
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		What Ma	ttors to No			
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	🗑 Consent	Things	Will Do: @			
	Programmes	There are	e no pending actions			+ New action
	Tasks	+ New bo	-			
	Configuration	History	Print Save			
	configuration .		June			





![](_page_14_Picture_0.jpeg)

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

<ul> <li>WTCC Login</li> <li>Type the following URL in your Internet Explorer browser</li> <li><u>http://nscp-</u> <u>ccms.connected.health.nz/</u></li> <li>Enter your username, password and click 'Login'</li> <li>Patient Search</li> <li>Type in the Patient Name, Patient NHI, or DOB of the patient</li> <li>Select Search</li> <li>Note: If searching by patient name, a</li> </ul>	NAVIGA Username Password	Petere Search	Tahi DNAL OUTCOMES	Login your password?	Guet		
minimum of 2 letters is required							
<ul> <li>Double Click required patient name to return patient in context</li> <li>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</li> </ul>	Whanau Tahi Item (ke) Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak Itak	Pattent Siarch           •         Pattent Siarch           •         Amount Siarch	Weise         Given Name           AD11         AD12           AD1         AD12           AD12         AD12           AD13         AD13           AD15         AD15           AD15         AD15           AD15         AD15           AD15         AD15	Famil 0           Famil 0           Y           Family Name           MODE           MODE	Oute of Birth         Image: Control of Birth         Image: Controward         Image: Control of Birth	Search serings H4	Larr, Fully 2. Ver Henuet Assoc (spice) Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives Nactives
Join Care Team <ul> <li>Select Join the Care Team</li> <li>Select Role</li> <li>Select Reason for Access</li> <li>Select Access Record</li> </ul> <li>One Off record access <ul> <li>Select Access one off</li> <li>Select Reason for Access</li> <li>Select Access Record</li> </ul> </li>	Break The Glass MOUSE, J Access to with your Access to With your Reason fo Reason fo	KE 1(Mr) Care Record Access Inform this patient record is subject to the this patient of the this patient the subject of the this patient t	Burn 10 <b>stoon</b> a privacy obligations detailed and will be part of the stand, and and and and and and and and and and	It Jun 1942 Service In your National Daved Care Plan Access a may also be advised that you have access and Rhomy Audit on ff scare team y	male Anti-ZZA114	toyment	
<b>Patient Overview</b> page will be displayed with Active Medications, Care Team Members, Current Diagnoses and Tasks							

![](_page_15_Picture_0.jpeg)

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iome (Me)	Patient Overview								
Il Patients	Prescriptions			Current Diagnosis					
his Patient	+ Add New			+ Add New					
Recent Activities	Detail	Dosage and Directions	Date Prescribed	Diagnosis Description		Diagnosis	Notes		
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Documents	Name	Details	Role	Due Date	Subject	Assigned To	Created By	Status	
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		CO 1464 CO.4							

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

![](_page_15_Picture_3.jpeg)

![](_page_16_Picture_0.jpeg)

![](_page_16_Picture_1.jpeg)

## How Do I Add an Assessment in Shared Care?

Select Assessments from the main menu	<ul> <li>Notes</li> <li>Assessments</li> <li>Plans</li> </ul>
Select New Assessment	New Note New Measurement New Diagnosis New Rx New Assessment New Task
<ul> <li>Select your Battery and Assessment form from the dropdown menus</li> <li>Follow the instructions to complete the form</li> </ul>	Battery     Partners in Health       Assessment     Partners in Health Scale
<ul> <li>Click Save</li> <li>'Park' saves a partially completed</li> <li>Assessement and you can return to it later</li> </ul>	Add New Park Save Cancel
<ul> <li>Compare Assessment scores by selecting 'Progress'.</li> <li>This displays the assessments side</li> </ul>	Detail         History         Progress           29-Jan-2015         29-Jan-2015           13:22:07         13:21:18
by side to show results	Battery     Partners in Health     Partners in Health       Test     Partners in Health Scale     Partners in Health Scale
	1. Overall, what I know about my health     2     3       condition/s is:     2     3
	2. Overall, what I know about my 5 4 Something medication/s & treatment/s for my health condition/s is:
	3. I take medications or carry out the treatments asked by my healthcare team     3
	4. I share in decisions made about my       5       4 Sometimes         health condition/s with my healthcare       team       4

![](_page_18_Picture_0.jpeg)

## How do I Create a Task in Shared Care?

Overview Screen	0	ADAMEON Sally	TI Born 12-Sep-1954	ST (60x 2m) Gender Female			NHL HAX1736	_	Kaur, Ruba
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	Add-Ins *	Workflow							
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By selecting the 'Publish	Task Detail	Recurrence		
<ul> <li>Task Detail</li> <li>Enter the Task Detail and click 'Insert'</li> <li>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.</li> </ul>	Is Uplace Task Detail Subject Created by Assigned To Patient Due Date Task Type Comment/Note	Born 12-Sep-1954 (60y 2m) Gender Female     Recurrence     Kaur, Ruby     Select a Care Team member or start typing to search     Adamson, Sally (HAX1736)     Select     Select     Characters remaining:   6000     nent/Note to patient's Clinical Notes section     Select     Select     Select     Select     Select     Select     Select     Note   Select     Note   Select     Note   Select   Note   Note   Note to Care Coordinator	* * * * * * * * * * * * * * * * * * *	X
		G		

![](_page_20_Picture_0.jpeg)

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

![](_page_20_Picture_2.jpeg)

![](_page_21_Picture_0.jpeg)

12		
Task Detai	I Recurrence Change History	
Subject	Cats plan	
Created by	Kaur, Ruby	
Assigned to Patient	CAT, BLACK	
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![](_page_22_Picture_0.jpeg)

### How do I Create and View an ACP

From the Patient Overview screen Click 'Create' on <b>Advance Care Plan</b> from the	Whānau Tahi	TEST, PATIENT (	Mr) Born 05-May-19	TEST 55 (59y 7m) Gender Male Known Allergies or Alerts		NHI EES2309 More Details •	<b>Kaur, Rub</b> Melp User Manual About Log O
Workflow menu.	All Patients	Prescriptions			Current Diagnosis		
	© Recent Activities	Denal PANADELINE EXTRA (PARACE TARICS, SOOma-COOPANE PROSPISATE, Stera), Capital PHO	Donage and Directions 9/12/2014 ADEINE EXTRA (PARACETANICL 500mg/CODEINE SPHATELEmg) Capitels 10	Date Prescribed 09-Dec-2014	Bagrassi Description Hoy feer - unspec allergen (H172.11)	Diagnost's Notes	
	Messurements  Magnesis  Automatical  Autom	Care Team	Dends GP   Molfrech - NA Testing   CMDHB	Role Core Team Monther	Tasks  + Add tere Due Dere Subject terrenet to fourfage, Include Complexed Tasks	Assigned To Created By	Status Ge to Linked Item
	iai rosts Ministration · Adélins ·	Workflow Wuckflow Advance Care Plan	Status -	Car	Include Inactive		

x

![](_page_23_Picture_0.jpeg)

message:	Welcome to Whãnau Tahi Advance Care Plan <mark>, <u>click here</u> tc</mark> create a new one
Select "click here" to begin the ACP	
Fill in all the relevant fields and other	Whânau Tahi Advance Care Plan Home History About 💄 Ross, Deborah Logout
information. 'Save' the ACP	Patient Information
	Last Name: adam First Name: sally Address:
	DOB: 12 Sep 1954 NHI: HAW1736 Contact:
	Section 1 - My Advance Care Plan
	This is my advance care plan and contains my choices. Please follow this plan if I am unable to tell you what I want.
	Section 2 - What matters to me
	This is what I want my whanau and loved ones and healthcare team to know about who I am and what matters to me:
	Please type here
	My cultural, religious and spiritual values, rituals and beliefs:
	~
Types of fields	Section 2 - What matters to me
Free text field	This is what I want my whanau and loved ones and healthcare team to know about who I am and what matters to me:
Wherever the form says "Please type here"	Type free text here
click and type your free text answers	My cultural, religious and spiritual values, rituals and beliefs:
	Please type here
Check Boyes	Please type here
Check Boxes	Please type here
Check Boxes Click in the boxes to select (tick)	Please type here Section 2 - What worries me This is what I want my whanau, loved ones and healthcare team to know about what worries me.
Check Boxes Click in the boxes to select (tick)	Please type here  Section 2 - What worries me  This is what I want my whanau, loved ones and healthcare team to know about what worries me. I worry about:
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.	
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.	Please type here       Section 2 - What worries me         Section 2 - What worries me         This is what I want my whanau, loved ones and healthcare team to know about what worries me.         I worry about:       my loved ones because:         I suffering. To me this means:       suffering. To me this means:
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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	
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	Please type here         Section 2 - What worries me         This is what I want my whanau, loved ones and healthcare team to know about what worries me.         I worry about:         my loved ones because:         suffering. To me this means:         Please type here         end being able to talk or communicate.         not being able to talk or communicate.         not doing things such as:
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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	
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	Please type here         Section 2 - What worries me         This is what I want my whanau, loved ones and healthcare team to know about what worries me.         I worry about:         my loved ones because:         suffering. To me this means:         Please type here         not being able to talk or communicate.         not doing things such as:         I am well.         I am receiving care and treatment for the following:         RESET SELECTION
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	Please type here
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	Please type here         Section 2 - What worries me         This is what I want my whanau, loved ones and healthcare team to know about what worries me.         Iworry about:         my loved ones because:         suffering. To me this means:         Please type here         not being able to talk or communicate.         not doing things such as:         I am well.         I am receiving care and treatment for the following:         RESET SELECTION
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	Please type here         Section 2 - What worries me         This is what I want my whanau, loved ones and healthcare team to know about what worries me.         I worry about:         my loved ones because:         suffering. To me this means:         Please type here         not being able to talk or communicate.         not doing things such as:         I am well.         I am receiving care and treatment for the following:         RESET SELECTION

![](_page_24_Picture_0.jpeg)

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Indicates how strongly you relate to the options	onļ	y the basics	0 0 0 <mark>(</mark>		all the details a condition and r	bout my ny treatment R	ESET SELECTION
Click the radio button to change y our option or choose reset selection to make all radio buttons empty again							
Add a Table Row	My will and other im	portant things ca	in be found:				
	Docun	nent/Item		Where it is		No	otes
table	Please type here		Please type h	iere	$\langle \rangle$	Please type here	$\bigcirc$
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	Whãnau Tah 16 Oct 2017 1 Facility: Mangere H view	i Advance ( 1:27:12 - Debo ealth Centre	Care Plan Irah Ross	Home	listory Abc	out 💄 Ross, D	eborah Logout
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	Whānau Tah	i Advance (	Care Plan	Home H	listory Abo	out 💄 Ross, D	eborah Logout
After an Advance Care Plan is saved,	Home (Me)	ADMIT, Quick (M	rs)			Born 05-Jun-1955 (59v	) Sex Female NHI MAM12S
REFRESH the screen by either clicking on any	All Patients 💌	Address	Phone and en	nail		Allergie	s or alerts not recorded 🛛 👻
other menu item or click the F5 button on	This Patient	Care Team			Current Diagno	sis	
your keybeard	Recent Activities	Name	Details	Role Care Te	Diagnosis Desci	ription	Diagnosis Notes
your keyboard	Care Team	Eaves, Sam	GP   MedTech - hA Testin	g CMDHB Membe	r	No records to display.	
You can View or Edit the Plan by clicking on the relevant button in the Workflow window	Assessments Plans Measurements V Diagnosis Documents	<	III		•		
	Patient Portal Consent	Workflow			Tasks		
	Programmes	Workflow	Status Finalised	View I Edia	+ Add New		S Refresh
	Configuration V Add-Ins V	Auvance Care Plan	19-Jun-2014		Due Date 13-Jun-20	Subject Assigne 14 my lifestyle George,	d To Created By Status Dipa Kaur, Ruby Open Go to Linked Item
		Programmes			Include Completed		
		+ Add New		S Refres	Tasks		
		Programme	Program	nme Status	mactive		
		Shared Care Managem	ent Enrolled	12-May-2014			

![](_page_25_Picture_0.jpeg)

#### What if there was an Old ACP?

If there was a previous ACP, it will show in the Workflow window, and will stay there	Workflow					
until a NEW ACP is created	Workflow		Status			
	Advance Care Plan	n (old version)	Updated 26-Jun-2017	View		
	Advance Care Plan	n	-	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	Home (Me)     Y       All Patients     Y       This Patient     A       @ Overview     Image: Care Team       Image: Care Team     Image: Care Team	Patient Documents       Dacument Filter       Category:     Select       Date From:     Image: Comparison of the select of	Added By: Date To: Desc Contains:	Select	Category Assessment	Filer Clear Filer

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

Patient Portal, Measurements,	Whānau Tahi	ADAMSON, Sally Born	TEST 12-Sep-1954 (68y 2m) Gender Known Allergies or J	Female		NHI HAX1736	Ka Settings Help User Manual Abo	<b>Laur, Ruby</b> out Log Out
<ul> <li>Check the box and enter patients personal email address</li> <li>Select measurements you wish the patient to be able to view and add from within the portal</li> <li>Select the Resources from the library you wish to make</li> </ul>	Whanau Tahi Nuae (ba)   A Patera Control Control C	Patient Web Pertal Access New York access multiple for the patient 7 New York access multiple for the patient 7 New York access the patient 1 New York access the patient 1 Patient Web Pertal Resourcess Tak due items the must be accessible in the patient partal Patient Web Pertal Resources	Koam Altergies et A	Nerge Concernent of Concernent	Cpinney free (P(f))	Ministry United States	Serup Nij CorReal And Igaar Fard Adres (gaar Fard Adres) (Pre- Sery (Sery (Sers)	ot Log Dat
available to your patient via the portal	Adéles *		Egglar Disother					Sne

#### 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

![](_page_25_Figure_10.jpeg)

![](_page_26_Picture_0.jpeg)

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