



# Installing Primary Options for Evolution

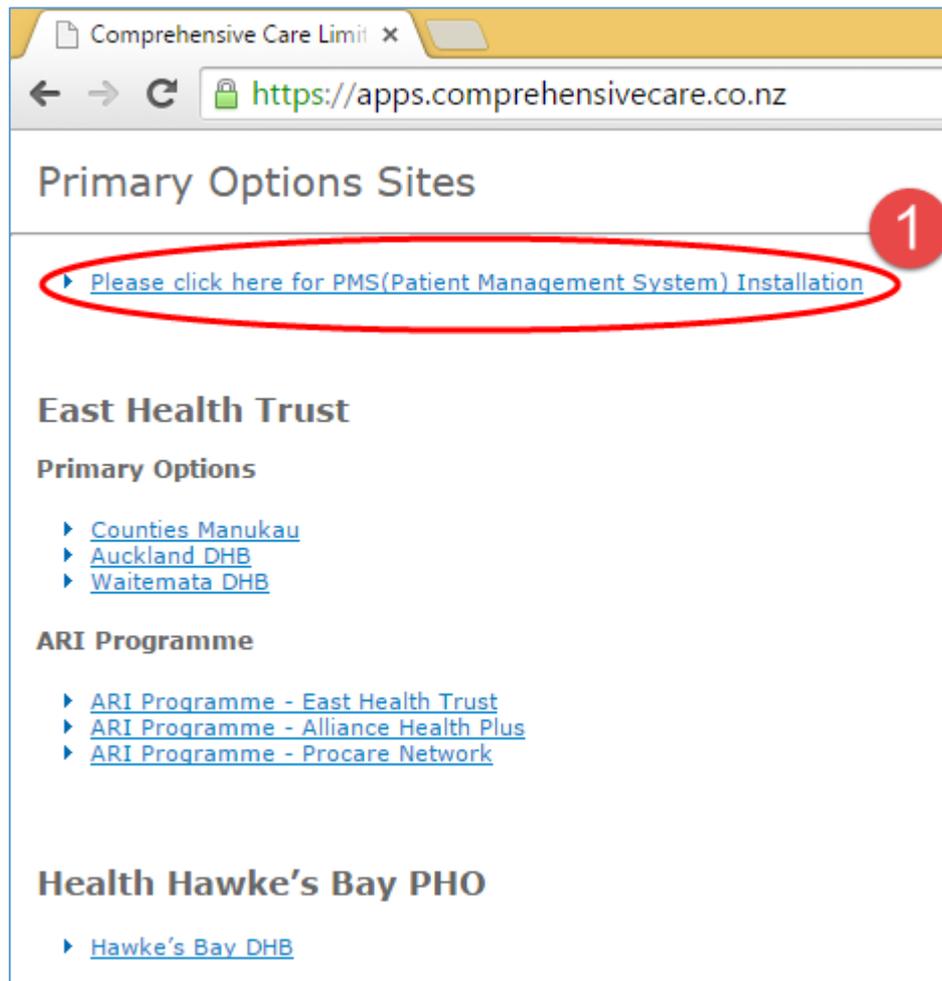
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9 July 2015

## Step one

Go to <https://apps.comprehensivecare.co.nz>

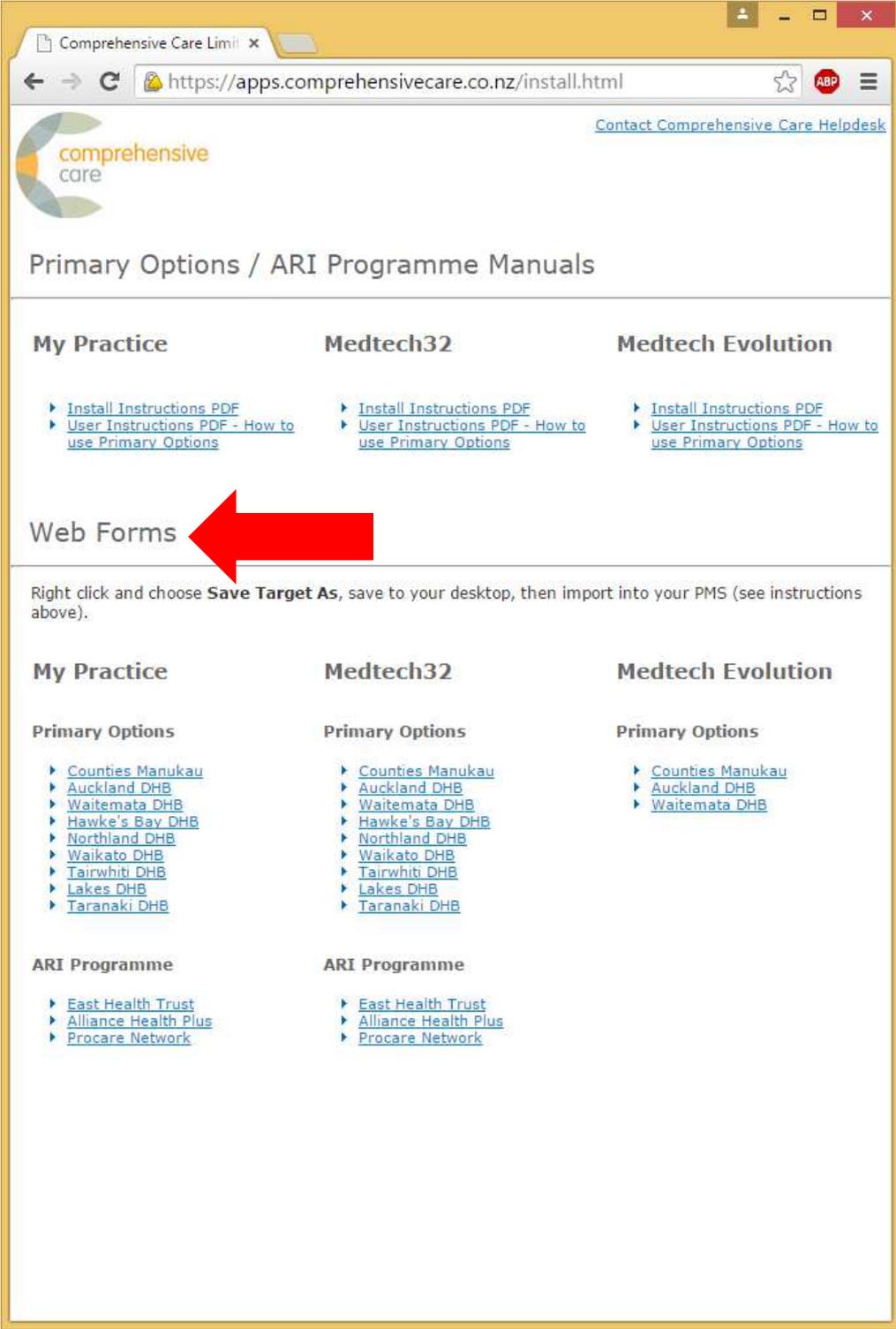
1. Click on the link to go to the installation page



## Step two

Download the appropriate XML file relating to the Patient Management System (PMS) and instance of Primary Options that relates to you

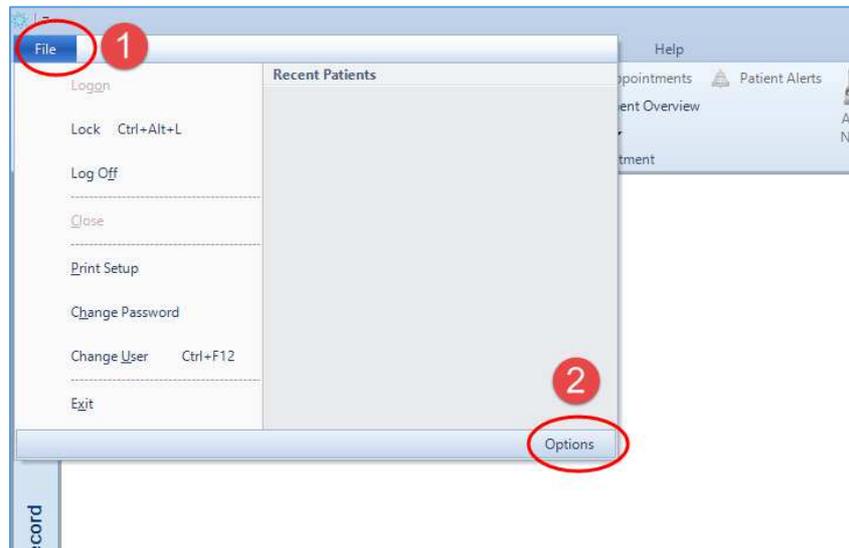
Open your PMS



The screenshot shows a web browser window with the URL <https://apps.comprehensivecare.co.nz/install.html>. The page title is "Primary Options / ARI Programme Manuals". The page content is organized into three columns: "My Practice", "Medtech32", and "Medtech Evolution". Each column contains links for "Install Instructions PDF" and "User Instructions PDF - How to use Primary Options". Below this, a section titled "Web Forms" is highlighted with a red arrow. This section contains instructions: "Right click and choose **Save Target As**, save to your desktop, then import into your PMS (see instructions above)". Below the instructions, there are three columns of links for "Primary Options" and "ARI Programme" under each of the three main categories. The "Primary Options" links include: Counties Manukau, Auckland DHB, Waitemata DHB, Hawke's Bay DHB, Northland DHB, Waikato DHB, Tairwhiti DHB, Lakes DHB, and Taranaki DHB. The "ARI Programme" links include: East Health Trust, Alliance Health Plus, and Procure Network.

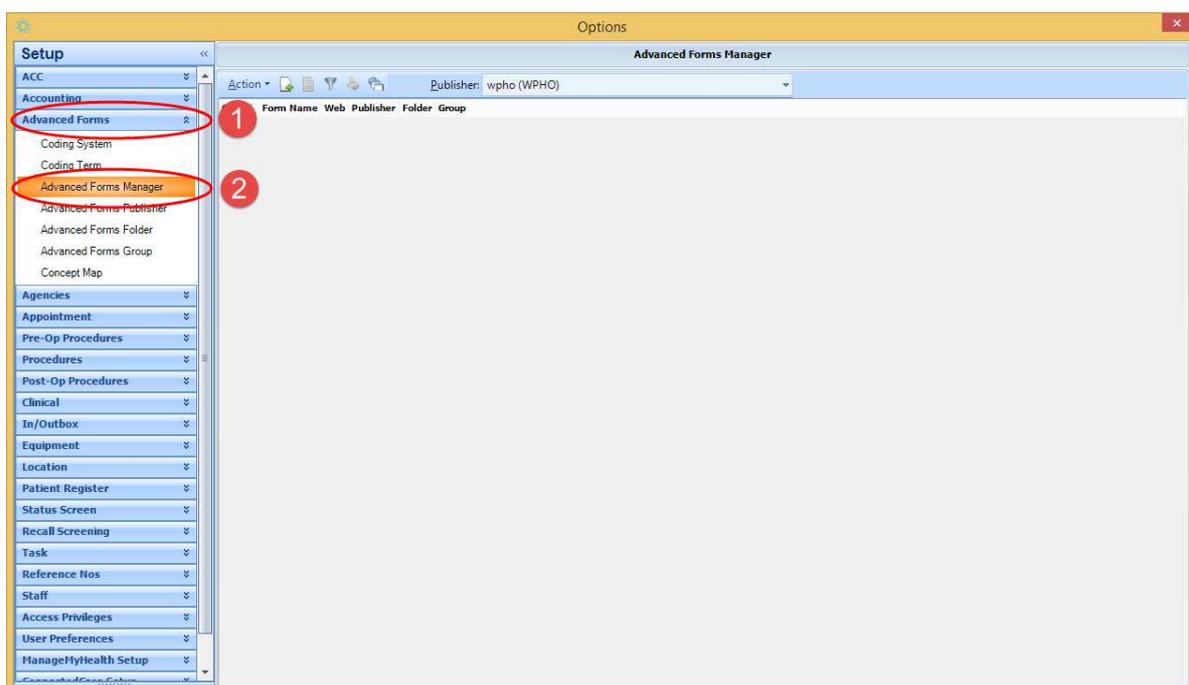
## Step three

1. Select 'File'
2. Then select 'Options'



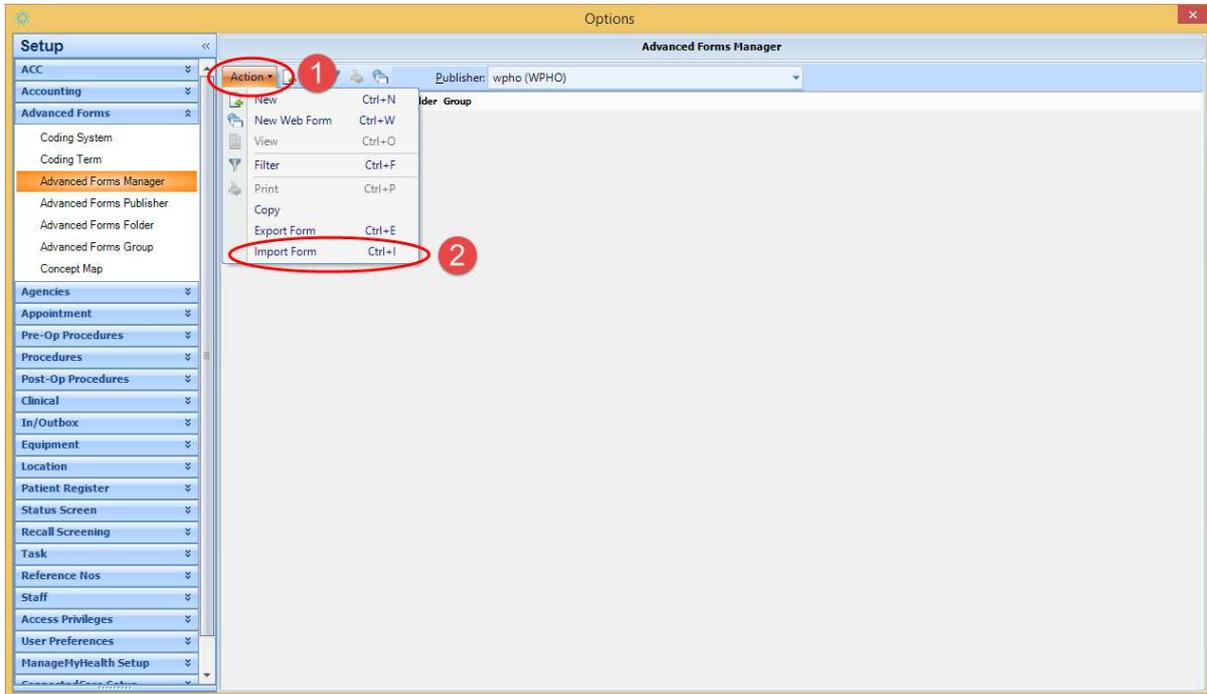
## Step four

1. Select 'Advanced Forms' from the left-hand menu
2. Then select 'Advanced Forms Manager'



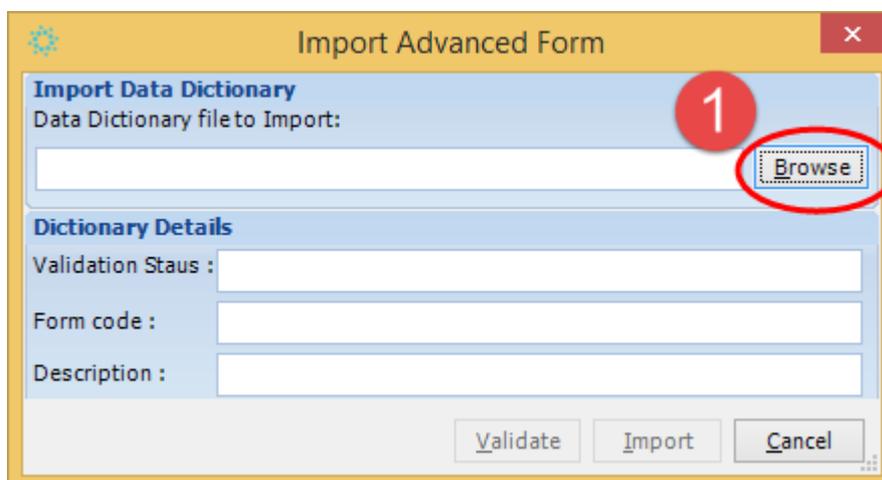
## Step five

1. Select 'Action'
2. Then select 'Import Form'



## Step six

1. Using the 'Browse' option, find the form you downloaded in step two



## Step seven

1. Once the form is selected, click the 'Validate' button

Once the form has successfully validated, the text will populate (similar to the screenshot below).

2. Click on the 'Import' button

**Import Advanced Form**

**Import Data Dictionary**  
Data Dictionary file to Import:  
C:\Users\rbush\Downloads\MT32 - Primary Options Counties (POAC)

**Dictionary Details**  
Validation Status : All OK  
Form code : POAC.MT  
Description : Primary Options Counties POAC

## Step eight

Close the 'Options' window, then open any test patient using the 'F2' key

**Search Patient**

Quick Advanced

Name/Chart/NHI: MI MO   Search MMH SEHR ▼

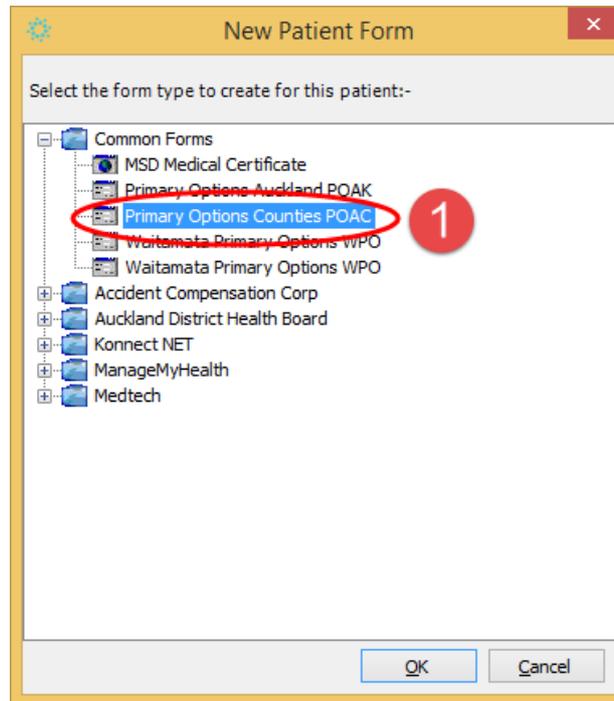
Patients Only:  A/c Holders Only:  Include Inactive:  Patients Count: 1 of 1

Name	Address	Prov	Age	DOB	NHI	A/C	Gms	Balance
MICKY Mouse (1.1)		ADM	R			P	A 3	

## Step nine

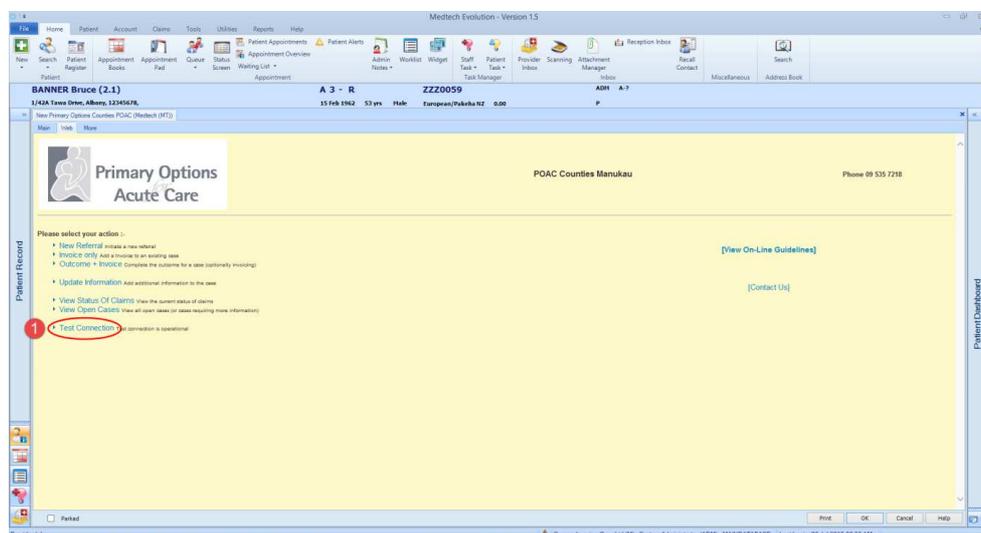
Using 'Shift + F3' open the 'New Patient Form' Window

1. Double-click on the form you imported to open it (the name may differ from the one shown in the screenshot below)



## Step ten

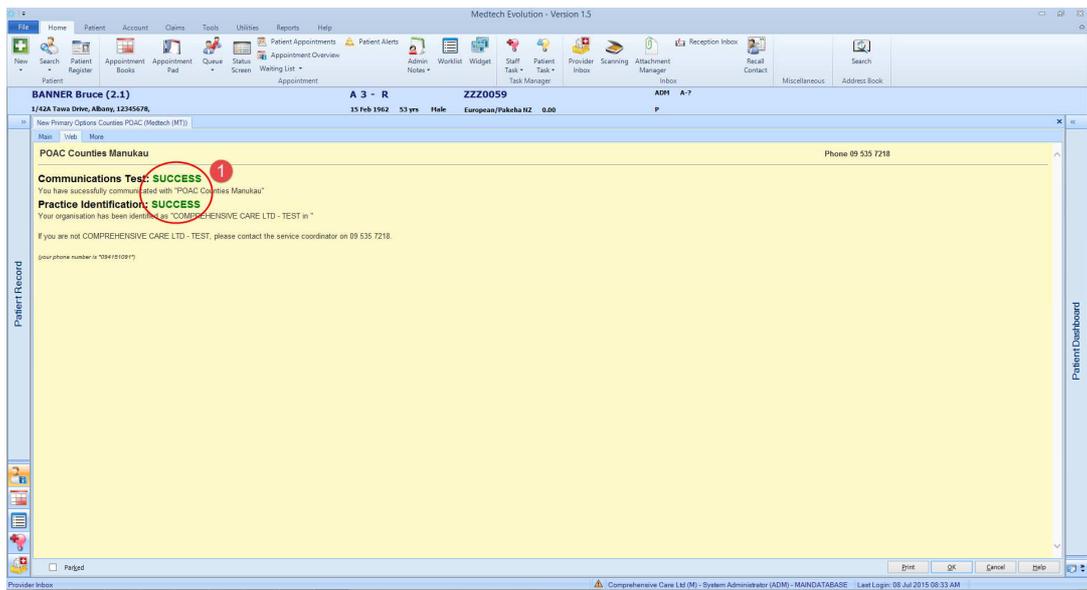
1. Once the form has opened, select 'Test Connection'



## Step eleven

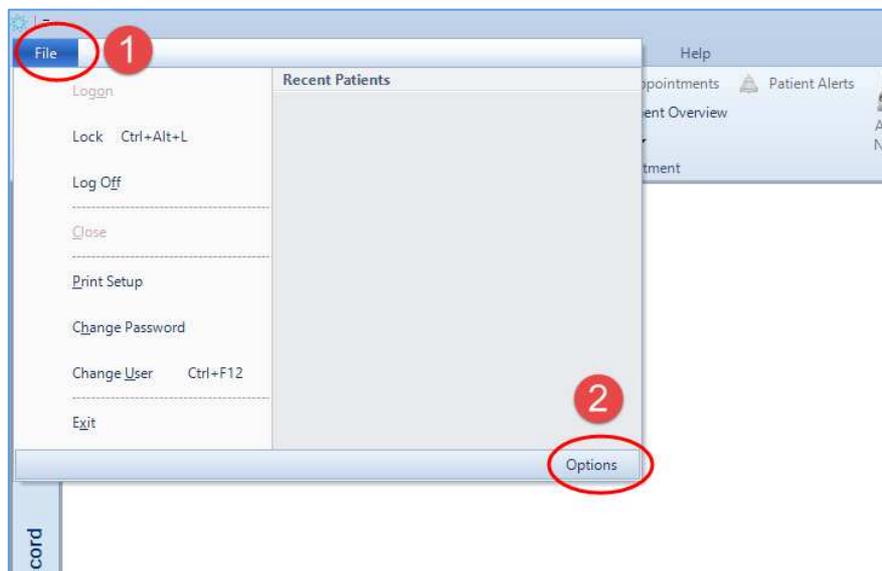
1. You should see success (as per screenshot below). If you don't see this please contact your Primary Options Coordinator

Close the form without saving



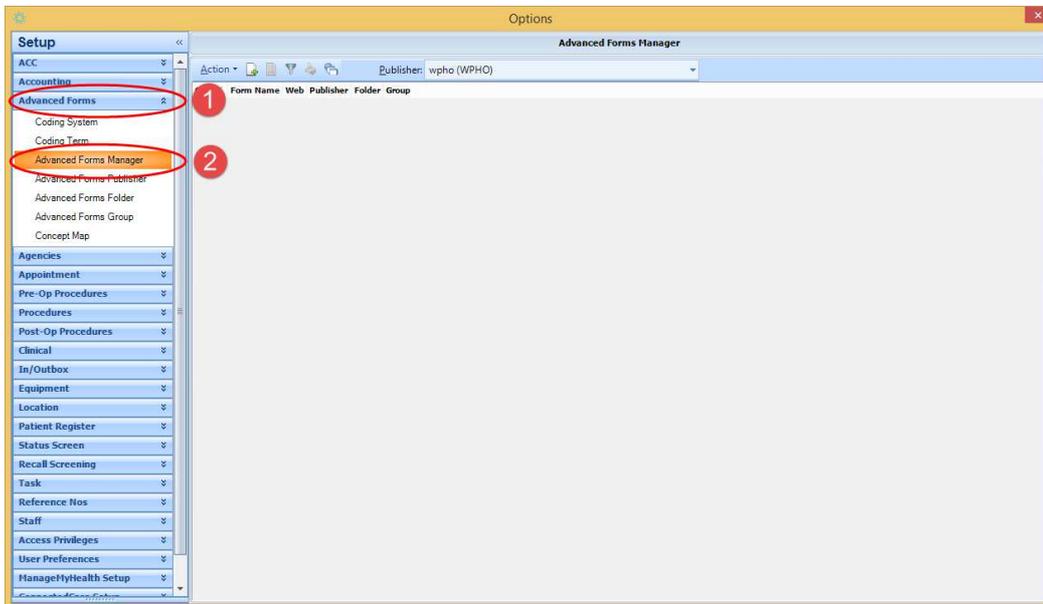
## Step twelve

1. Select 'File'
2. Then select 'Options'



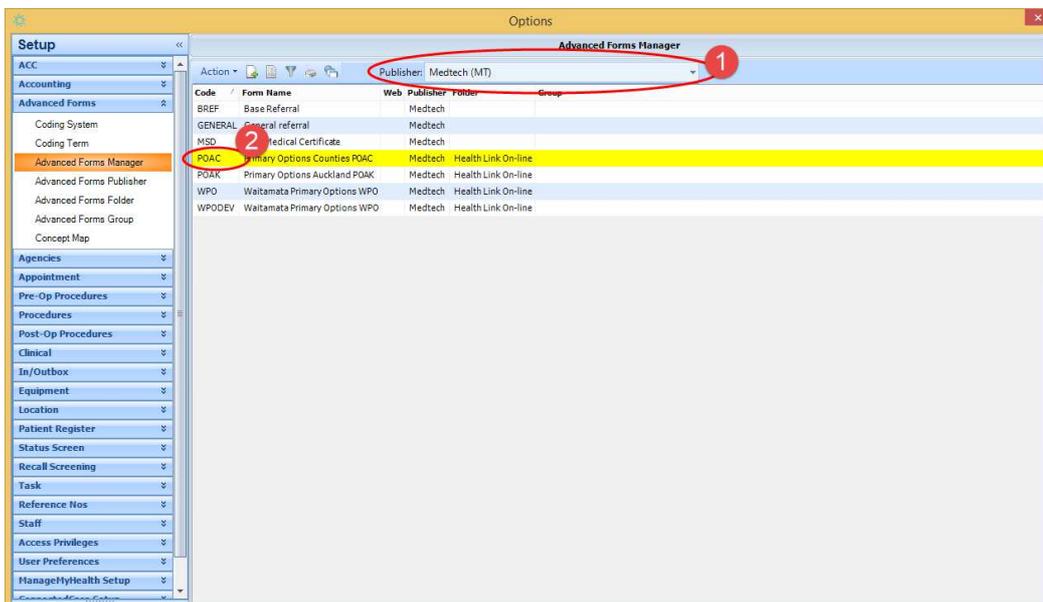
## Step thirteen

1. Select 'Advanced Forms' from the left-hand menu
2. Then select 'Advanced Forms Manager'



## Step fourteen

1. Select the publisher "MedTech (MT)"
2. Double-click on the form you imported to 'View Advanced Form'



## Step fifteen

1. Select 'Actions'
2. Ensure the tick-box shown below contains a tick
3. If not already populated, select the account to invoice by selecting the '...' button

View Advanced Form

Primary Options Counties POAC

Main Actions Fields Field Rules Form Rules User Settings Audit

User Message:

Summary Merge Text: Send To: None

Arial 10 B I U A A

Send to HealthLink Folder:

Export Format:

Invoice to Account:

Inactive:

OK Cancel Help

## Step sixteen

This step is only required if you need to complete part 3 of step fifteen above.

1. Select the account, then click on the 'OK' button to save

Search Patient

Quick Advanced

Name/Chart/NHI: MI MO Search Swipe CSC... Search MMH SEHR

Patients Only:  A/c Holders Only:  Include Inactive:  Patients Count: 1 of 1

Name	Address	Prov	Age	DOB	NHI	A/C	Gms	Balance
MICKY Mouse (1,1)	ADM R				P	A 3		

OK Cancel Add... Family Add... Help

## Step Seventeen

1. Click on the 'OK' button to save and finish.

**View Advanced Form**

**Primary Options Counties POAC**

Main | Actions | Fields | Field Rules | Form Rules | User Settings | Audit

User Message:

Summary Merge Text: Send To: None

Arial | 10 | B | I | U | [List Icon] | A | [Color Icon]

Send to HealthLink Folder:

Export Format:

Create Invoice to Account:

MICKY MOUSE (1.1)

Inactive:  **1** OK Cancel Help