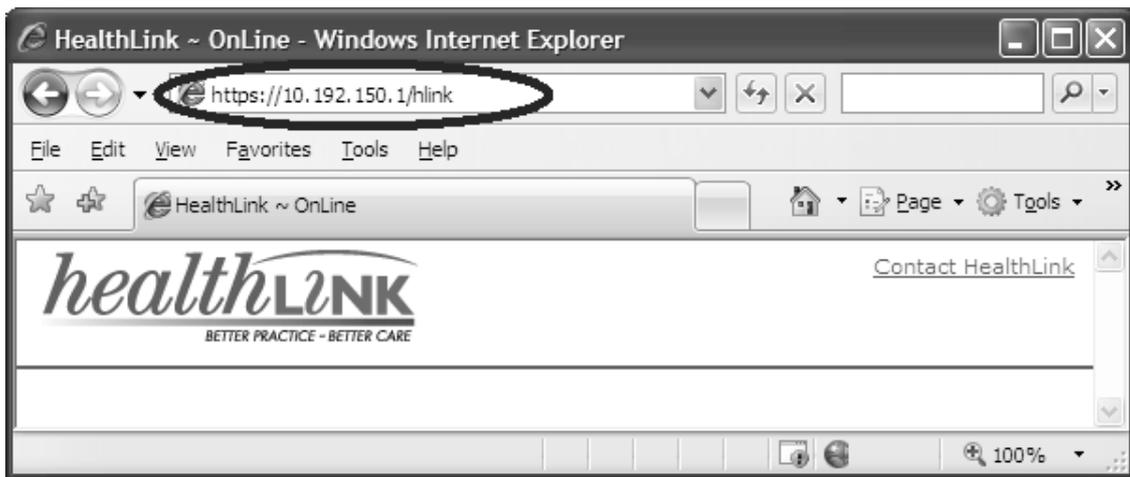


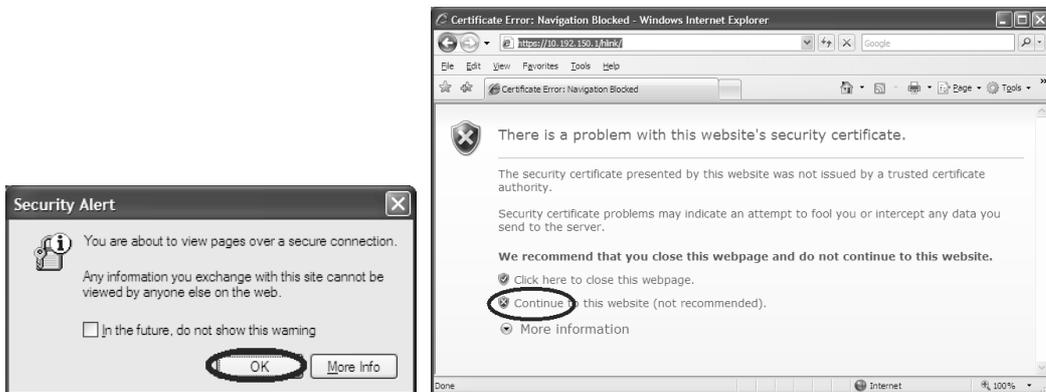
Primary Options Install Instructions

Step1 : Goto <https://10.192.150.1/hlink/>

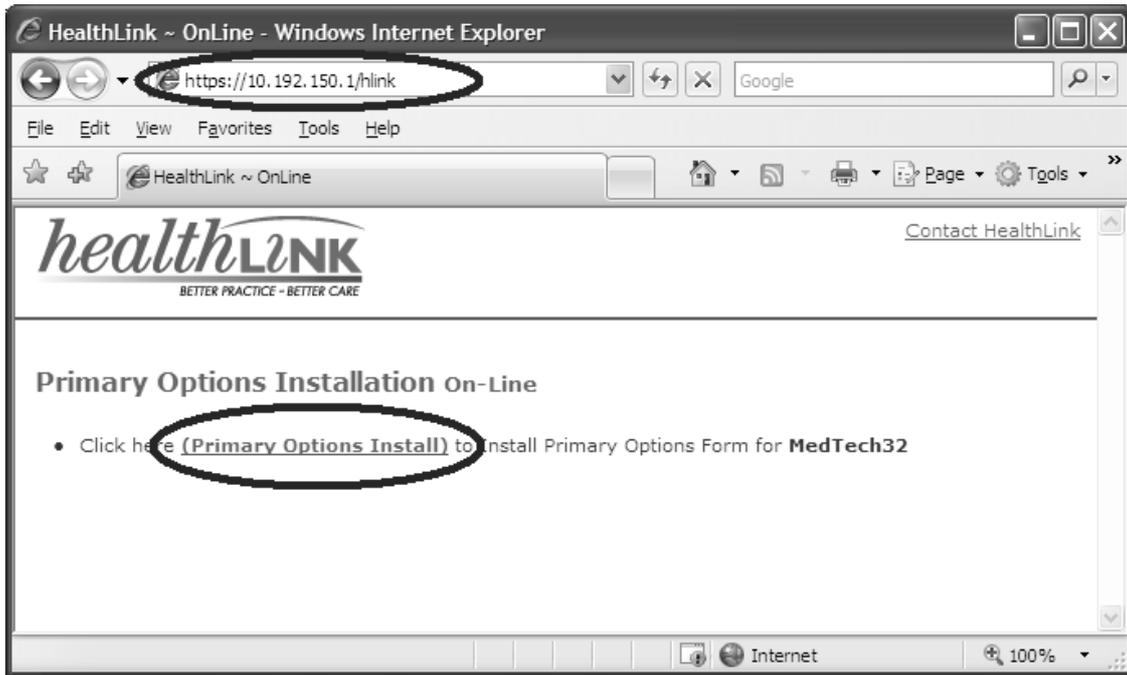
Enter <https://10.192.150.1/hlink/> in the address bar of your browser then press the enter key. (NOTE: The address is a secure connection using https not http)



You may get a certificate message/messages, click ok/continue



Step 2 : Click (Primary Options Install)

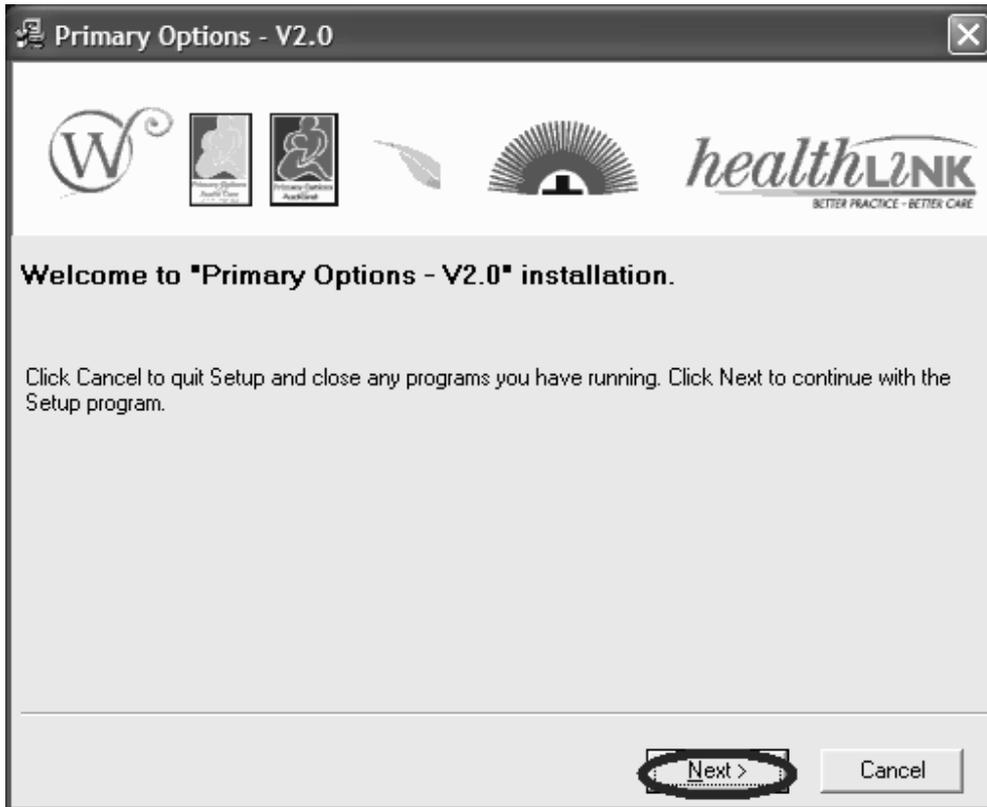


Step 3 : Download and Run



Step 4 : Welcome

Click Next



Step 5: Select your Primary Options Provider

Select the provider most appropriate to your area. Then click next.

Primary Options - V2.0



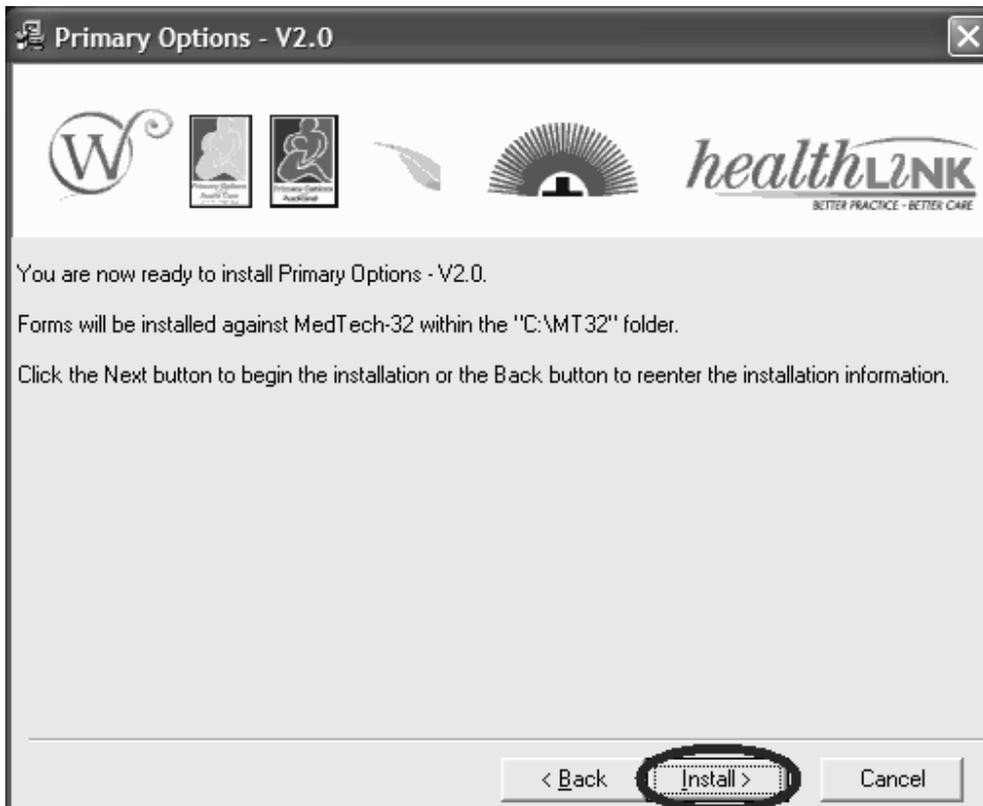
Please select the service you wish to install :-

- Waitamata Primary Options (WPO)
- Primary Options for Auckland (POAK)
- Primary Options Counties Manukau (POAC)
- Hawkes Bay - Coordinated Primary Options (HBPO)

Click Cancel to quit Setup and close any programs you have running. Click Next to continue with the Setup program.

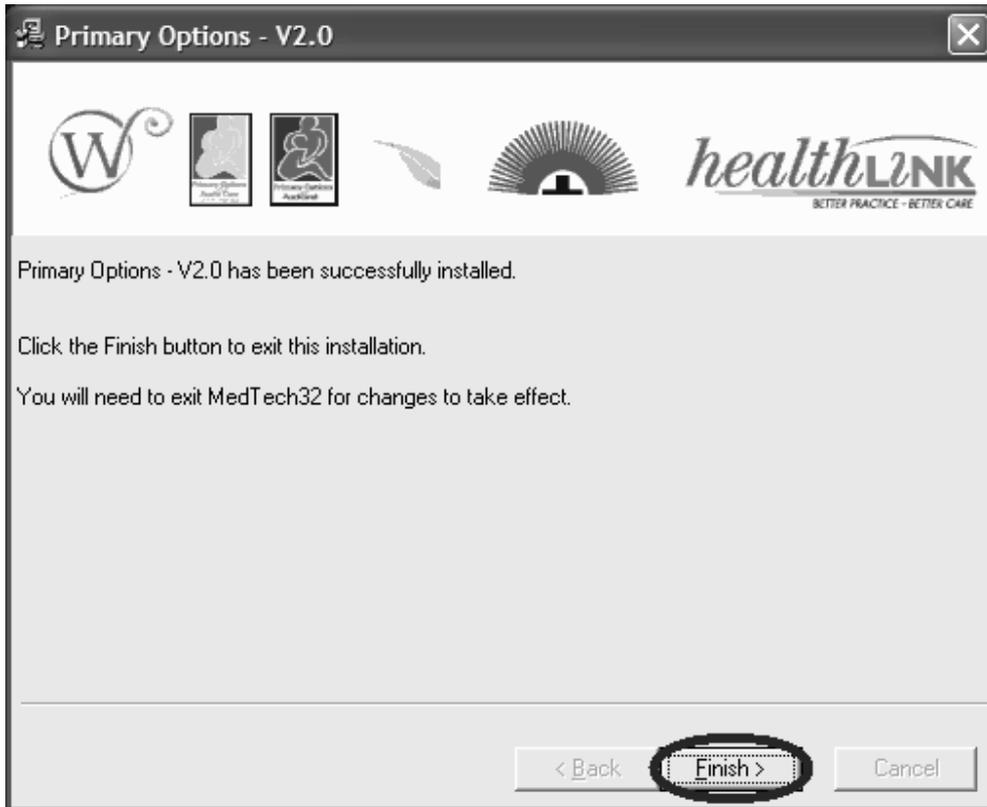
Next > Cancel

Step 5: Install



Step 5: Finished

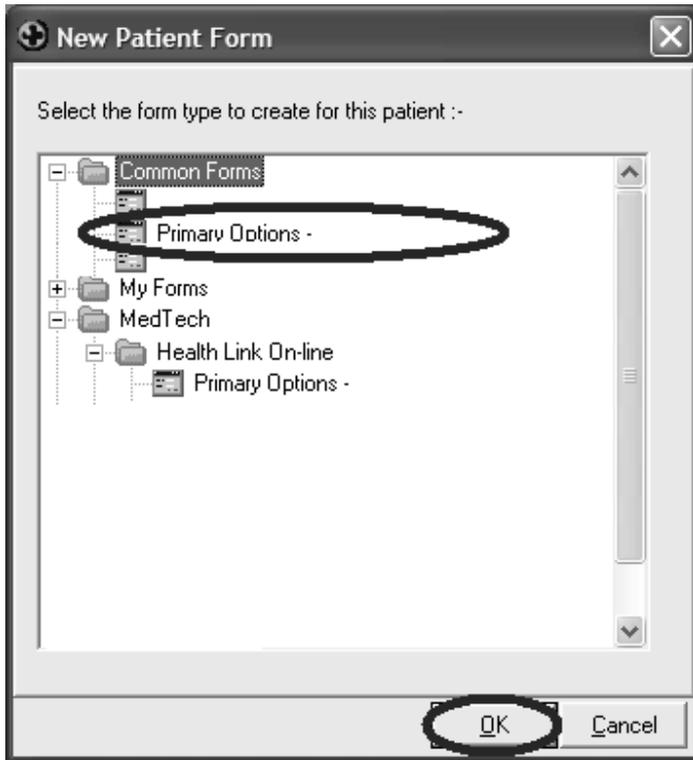
Click "Finished" to exit.



Step 6: Installation Complete

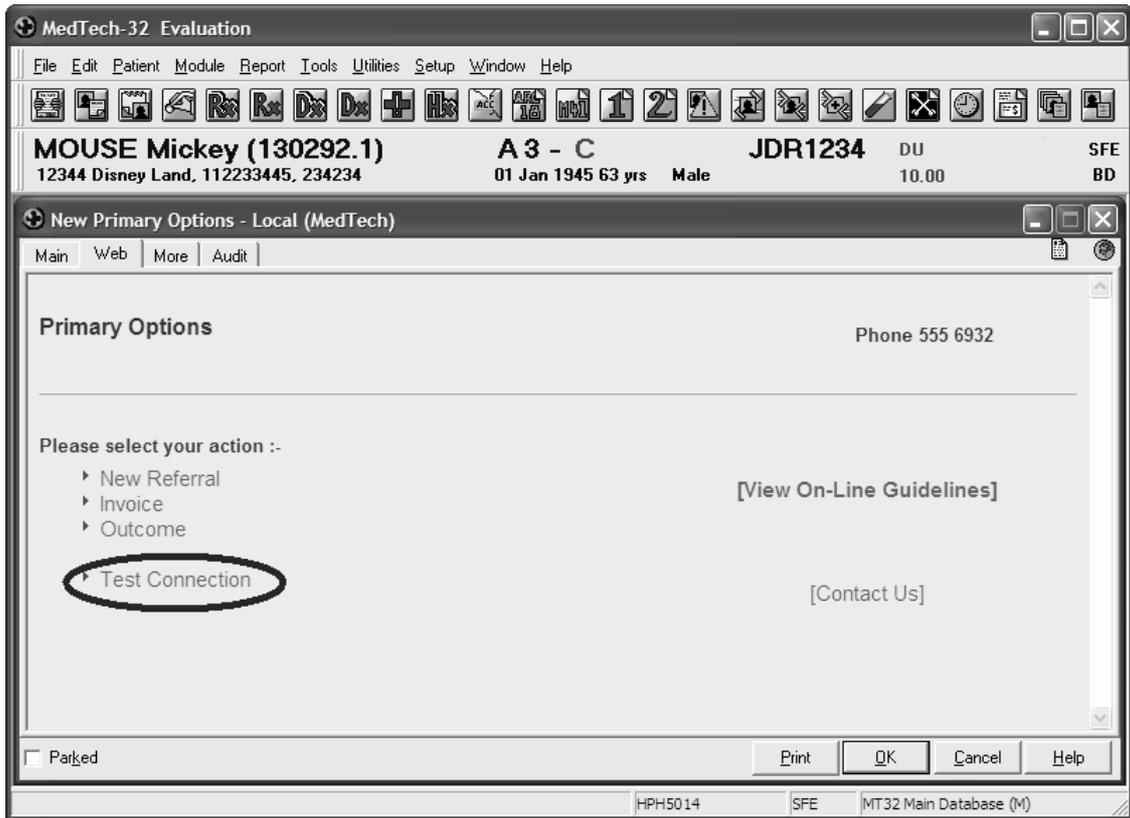
Step 7: From Medtech – New Form -> Primary Options

Press **Shift+F3** to open Module -> Advanced Forms -> New Form
Choose your "Primary Options" provider, Then Click OK



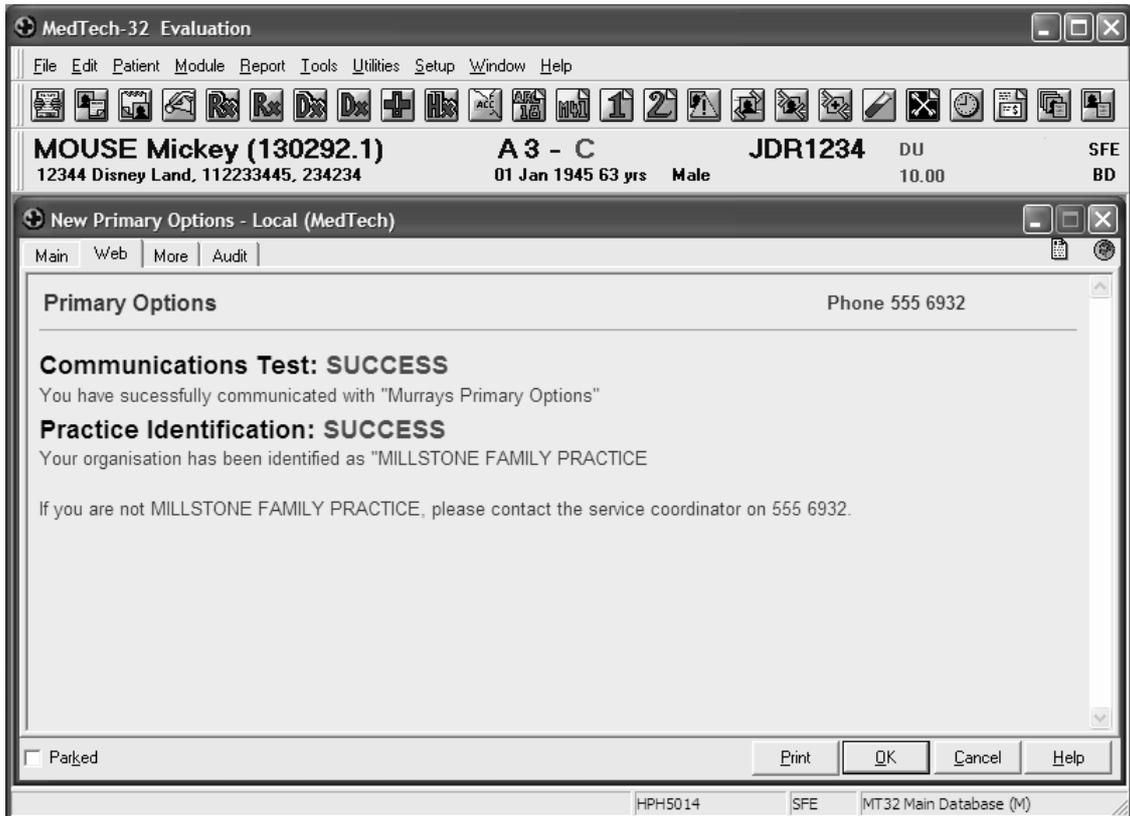
Step 8: Select “Test Connection”

Click “Test Connection”



Step 9: Success

You should see the success page, now click "Cancel"

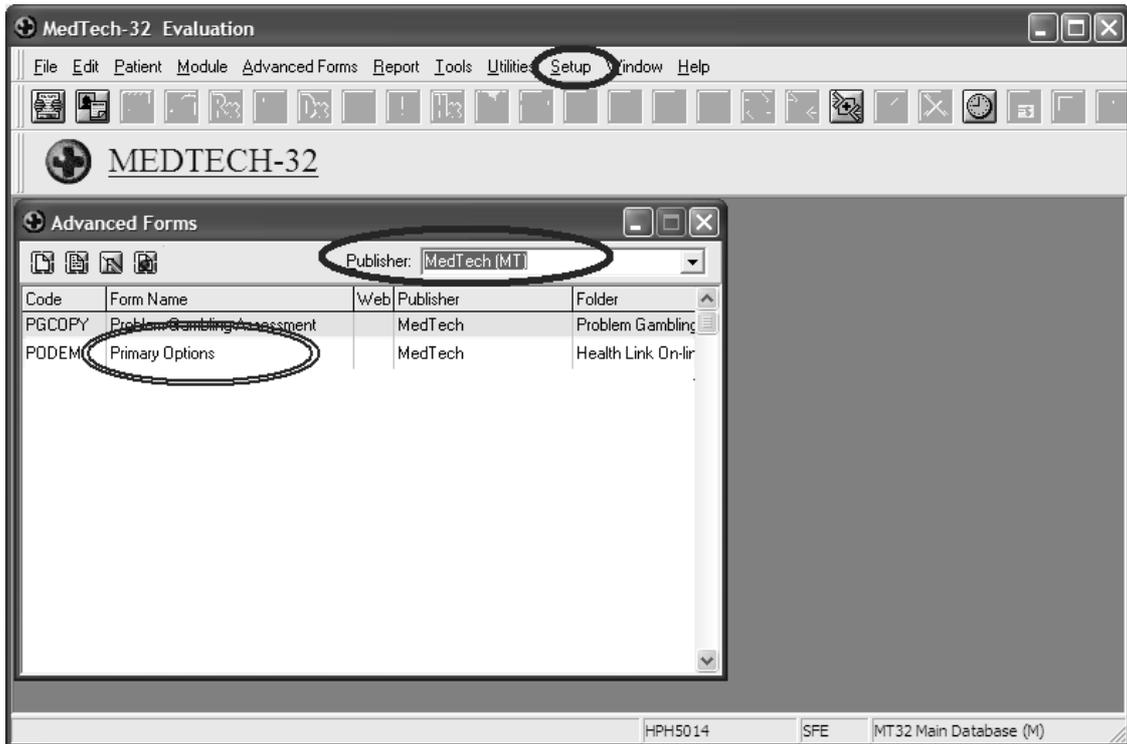


Step 10: Choose Account for Primary Options Invoices

The following steps are required, To allow invoices to the primary options system to be lodged in MedTech.

Step 10.1: Goto Advanced Forms Setup

- Goto: **Setup -> Advanced Forms -> Advanced Forms Manager**
- Change the Publisher to **MedTech (MT)**
- Double Click on the **“Primary Options Service”**



Step 10.2: Change Account

- Goto the **Actions** tab
- Tick [] Create Invoice to Account
- Double Click on the “……” and select Account Holder to Bill
- Finally click “OK” to save

View Advanced Form [Close]

Primary Options -

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

User Message:
[Text Area]

Summary Merge Text: Send To: [None]

[Text Area]

Send to HealthLink Folder:
[Text Field] [Browse]

Export Format: [Dropdown]

Create Invoice to Account:
[Text Field] [Browse]

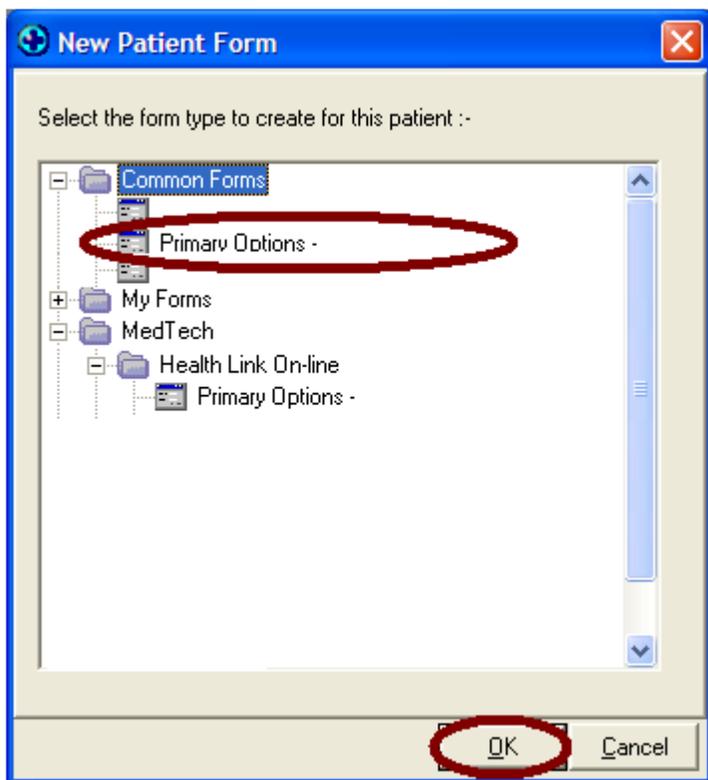
[OK] [Cancel] [Help]

Primary Options Information for MedTech32 Users

STEP 1: INITIATE PRIMARY OPTIONS

Press **Shift+F3** (or choose Module -> Advanced Forms -> New Form)

Choose your "Primary Options" provider (based on where the Patient resides). Click OK



STEP 2: NEW REFERRAL

Click "New Referral"

The screenshot displays the MedTech-32 Evaluation software interface. The main window is titled "New Primary Options Demo - local (MedTech)". The patient information at the top reads: "MOUSE Mickey (130292.1)", "12344 Disney Land, 112233445, 234234", "A 3 - C", "01 Jan 1945 63 yrs Male Indian", "JDR1234", "DU 10.00", "SFE BD". The "Primary Options" section includes a "RAILS" logo and "Phone 555 1234". Under "Please select your action :-", the "New Referral" option is highlighted with a red circle. Other options include "Invoice", "Outcome", "Update Information", "View Status Of Claims", "View Open Cases", and "Test Connection". The bottom of the window features a "Parked" checkbox, "Print", "OK", "Cancel", and "Help" buttons, and a status bar with "HPH5014", "SFE", and "EDGE (M)".

MedTech-32 Evaluation

File Edit Patient Module Report Tools Utilities Setup Window Help

MOUSE Mickey (130292.1) A 3 - C JDR1234 DU SFE
12344 Disney Land, 112233445, 234234 01 Jan 1945 63 yrs Male Indian Indian DU 10.00 BD

New Primary Options Demo - local (MedTech)

Main Web More Audit

RAILS Primary Options Phone 555 1234

Please select your action :-

- ▶ **New Referral** Initiate a new referral [View On-Line Guidelines]
- ▶ Invoice Add a invoice to an existing case
- ▶ Outcome Complete the outcome form for a case
- ▶ Update Information Add additional information to the case [Contact Us]
- ▶ View Status Of Claims View the current status of claims
- ▶ View Open Cases View all open cases (or cases requiring more information)
- ▶ Test Connection Test connection is operational

Parked Print OK Cancel Help

HPH5014 SFE EDGE (M)

STEP 3: CONFIRM ELIGIBILITY

Confirm Eligibility then click proceeded.

MedTech-32 Evaluation

File Edit Patient Module Report Tools Utilities Setup Window Help

MOUSE Mickey (130292.1) **A 3 - C** **JDR1234** **DU** **SFE**
12344 Disney Land, 112233445, 234234 01 Jan 1945 63 yrs Male Indian 10.00 BD

New Primary Options Demo - local (MedTech)

Main Web More Audit

Confirmation of Eligibility (For a New Referral)

- Patient resides with the Your DHB
- Patient would **normally be admitted** / referred to hospital for this episode of care or the hospital has referred the patient to you
- Patient will be **managed by you** or a colleague or after hours A/M where necessary
- The period of care under is anticipated to be **3 days or less**
- This condition is **NOT** covered by Acc
- The anticipated cost of care will be under \$300 (otherwise prior approval is required)
- The Patient has been **informed and agrees** to information on this form and other information relating to this illness will be made **available to primary options** and sub-contracted health care providers.

[\[View On-Line Guidelines\]](#)

[\[Contact Us\]](#)

PROCEED WITH REFERRAL

Parked Print **OK** Cancel Help

HPH5014 SFE EDGE (M)

Step 4 COMPLETE THE REFERRAL

Enter the Diagnosis, Coding, add notes then submit

MedTech-32 Evaluation

File Edit Patient Module Report Tools Utilities Setup Window Help

MOUSE Mickey (130292.1) **A 3 - C** **JDR1234** **DU** **SFE**
12344 Disney Land, 112233445, 234234 01 Jan 1945 63 yrs Male Indian **10.00** **BD**

New Primary Options Demo - local (MedTech)

Main Web More Audit

Case
Case Ref # Provisional/Working Diagnosis Coding

Referral "New"
Date 25 8 2008 Relevant Clinical Information (Expand)

Information
Please coordinate all Ultrasounds with PO
Organisation Millstone Family Practice Cbd p: 09 358 0116 f: 09 379 9188 pho: Harbour PHO
Provider provider not in the list, click [add](#)

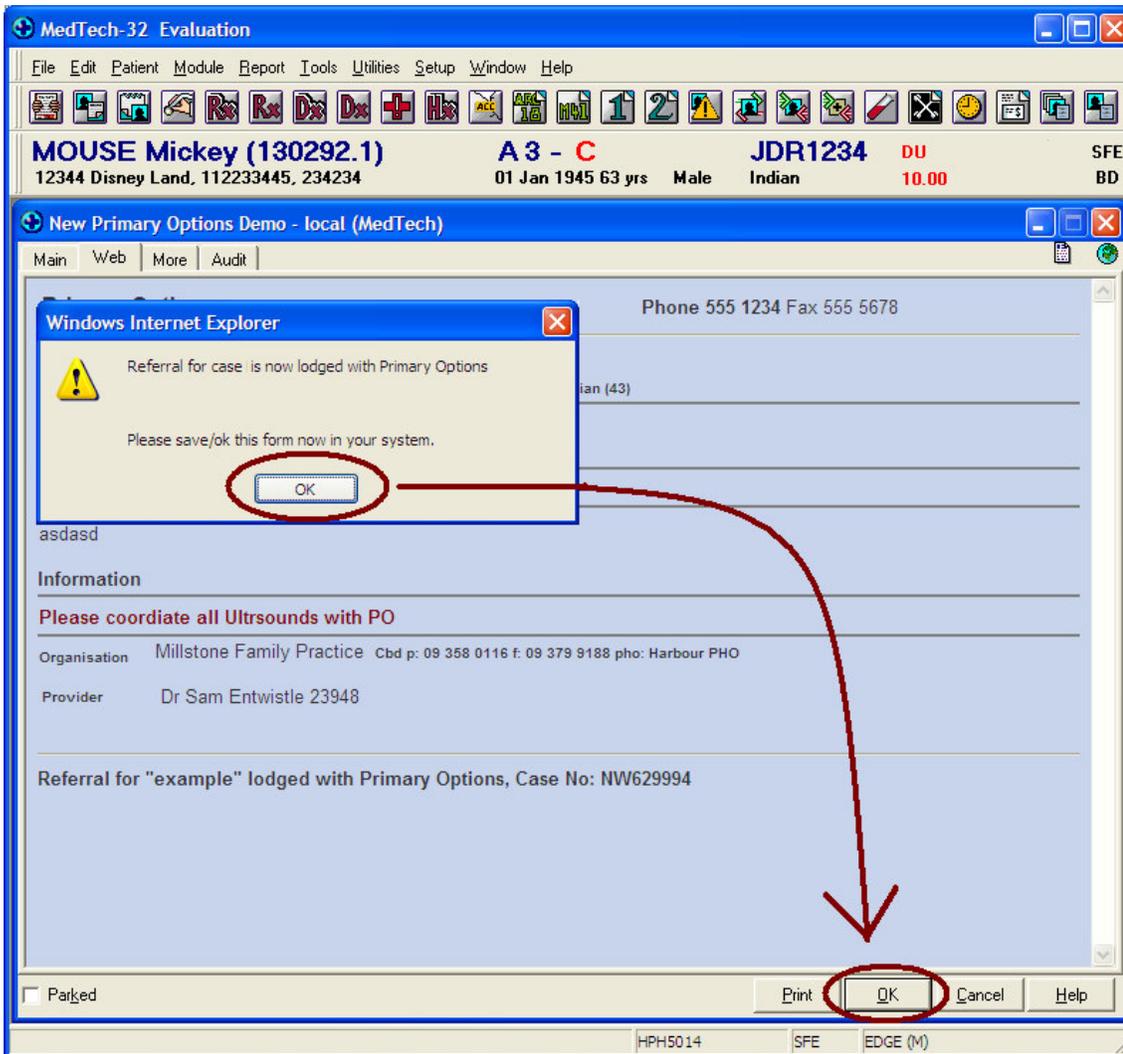
SUBMIT REFERRAL TO PRIMARY OPTIONS

Parked Print OK Cancel Help

HPH5014 SFE EDGE (M)

Step 5 Lodge/Save Form into Medtech

Finally Click OK to save the form in MedTech



ANYTIME: VIEW STATUS

Provides a full list of all claims lodged in the system and their status.

Follow Step 1 instructions and then choose 'View status of claims'

The screenshot shows the MedTech-32 Evaluation software interface. The main window displays patient information for Mickey Mouse (130292.1) and a list of actions under 'Primary Options'. The 'View Status Of Claims' option is circled in red, and a red arrow points to it. A pop-up window titled 'New Primary Options Demo - local (MedTech)' displays a table of claims.

DATE	TYPE/INV No	CASE No	AMOUNT	STATUS / PAID
25 Aug 2008	Referral	NW629994	-	New
25 Aug 2008	Invoice	NW620683	12.00	New
01 Aug 2008	Update	NW620683	-	New
01 Aug 2008	Outcome	NW497350	-	New
01 Aug 2008	Invoice	NW497350	-	New
01 Aug 2008	Update	NW497350	-	Accepted
01 Aug 2008	Referral	NW497350	-	New
01 Aug 2008	Update	NW472225	-	Accepted
01 Aug 2008	Update	NW123456	-	Accepted
01 Aug 2008	Outcome	NW620683	-	M/O Review
01 Aug 2008	Referral	NW620683	-	Accepted

OUTCOME

This section allows an Invoice and the Outcome to be processed. This provides Primary Options with the final information required to complete the claim and must be processed (preferably within 30 days of initiation date)

Follow Step 1 instructions and then choose 'Outcome'. You can enter the invoice in this section also, or you may enter the invoice separately as indicated in next step. Ensure all relevant consultation notes are added.

The screenshot shows the MedTech-32 software interface. The main window is titled "New Primary Options - Local (MedTech)". The patient information at the top includes: **MOUSE Mickey (130292.1)**, 12344 Disney Land, 112233445, 234234; **A 3 - C**, 01 Jan 1945 63 yrs Male; **JDR1234**, DU 10.00; and SFE BD. The "Primary Options" section shows Case **EG100000** example (Other infection), Outcome **"New"**, and Date **3/6/2008**. A large text area for "Relevant Clinical Information (Expand)" is present, with a circled "Add Consult Notes" button to its right. Below this are dropdown menus for "Final/Eventual Diagnosis", "Coding", and "Outcome of episode of care:". The "Organisation" is "Millstone Family Practice" and the "Provider" is "Dr Sam Entwistle #A88984-3". A prominent "SUBMIT OUTCOME TO PRIMARY OPTIONS" button is at the bottom. The status bar at the bottom shows "HPH5014", "SFE", and "MT32 Main Database (M)".

INVOICE

This section allows you to lodge an Invoice in the system.

Follow Step 1 instructions and then choose 'Invoice'

NOTE: An invoice will be lodged in the medtech32 system, when saved, please ensure the providers on the more tab are correct

The screenshot shows the MedTech-32 Evaluation software interface. The main window is titled "New Primary Options - Local (MedTech)". At the top, there is a menu bar with options: File, Edit, Patient, Module, Report, Tools, Utilities, Setup, Window, Help. Below the menu bar is a toolbar with various icons. The patient information is displayed as follows:

MOUSE Mickey (130292.1) **A 3 - C** **JDR1234** **DU** **SFE**
12344 Disney Land, 112233445, 234234 01 Jan 1945 63 yrs Male 10.00 BD

The "Primary Options" section includes:

- Case: EG10000 example (Other infection)
- Invoice: "New"
- Date: 3 / 6 / 2008
- Relevant Clinical Information (Expand)
- Organisation: Millstone Family Practice
- Provider: Dr Sam Entwistle #A88984-3 (provider not in the list, click [add])

The "Services" section is a table with columns for DATE OF SERVICE, SERVICE CODE + ANNOTATION, and AMOUNT.

DATE OF SERVICE	SERVICE CODE + ANNOTATION	AMOUNT
3 / 6 / 2008	GP Home Visit Home Visit By Doctor, Annotate Milage/After hours	75.00
3 / 6 / 2008	Practice Room Obs Initial Nurse observation, (1:1 most of the time),	60.00
3 / 6 / 2008		
3 / 6 / 2008		
3 / 6 / 2008		
3 / 6 / 2008		
3 / 6 / 2008		
3 / 6 / 2008		

At the bottom of the window, there are buttons for "Print", "OK", "Cancel", and "Help". The status bar at the very bottom shows "HPH5014", "SFE", and "MT32 Main Database (M)".