



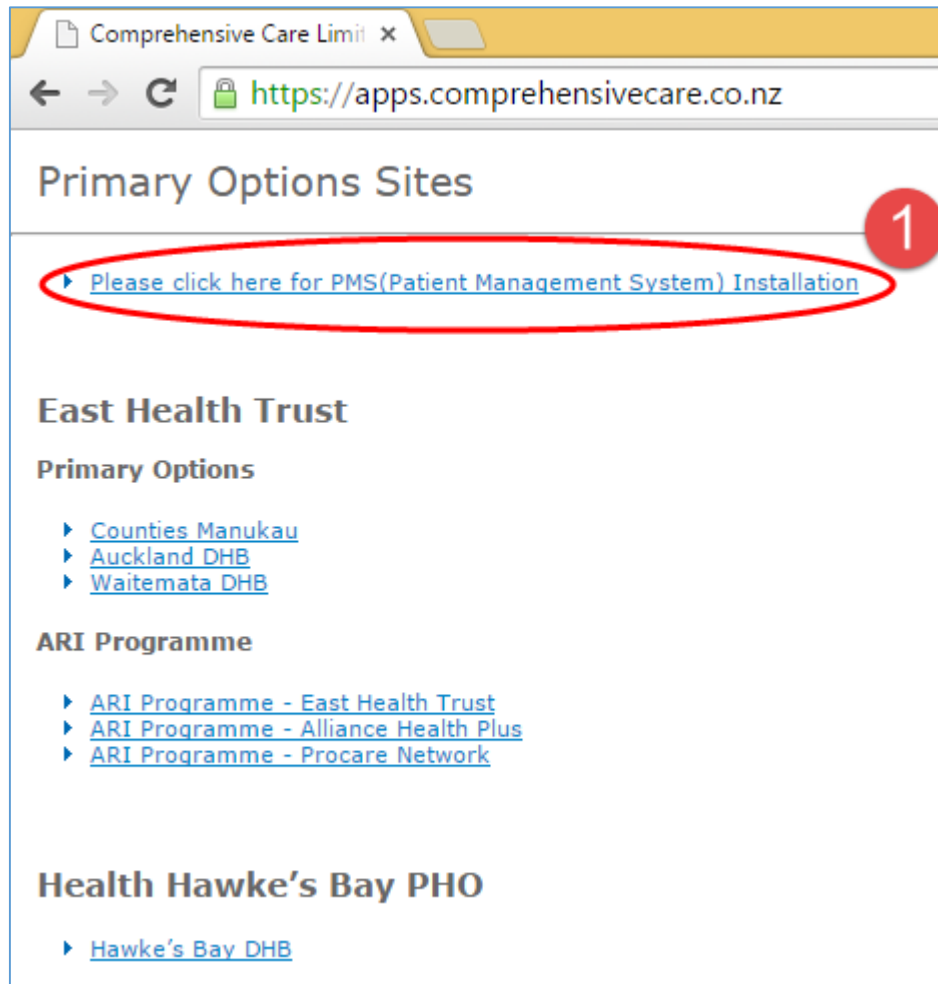
Installing Primary Options for Medtech32

9 July 2015

Step one

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

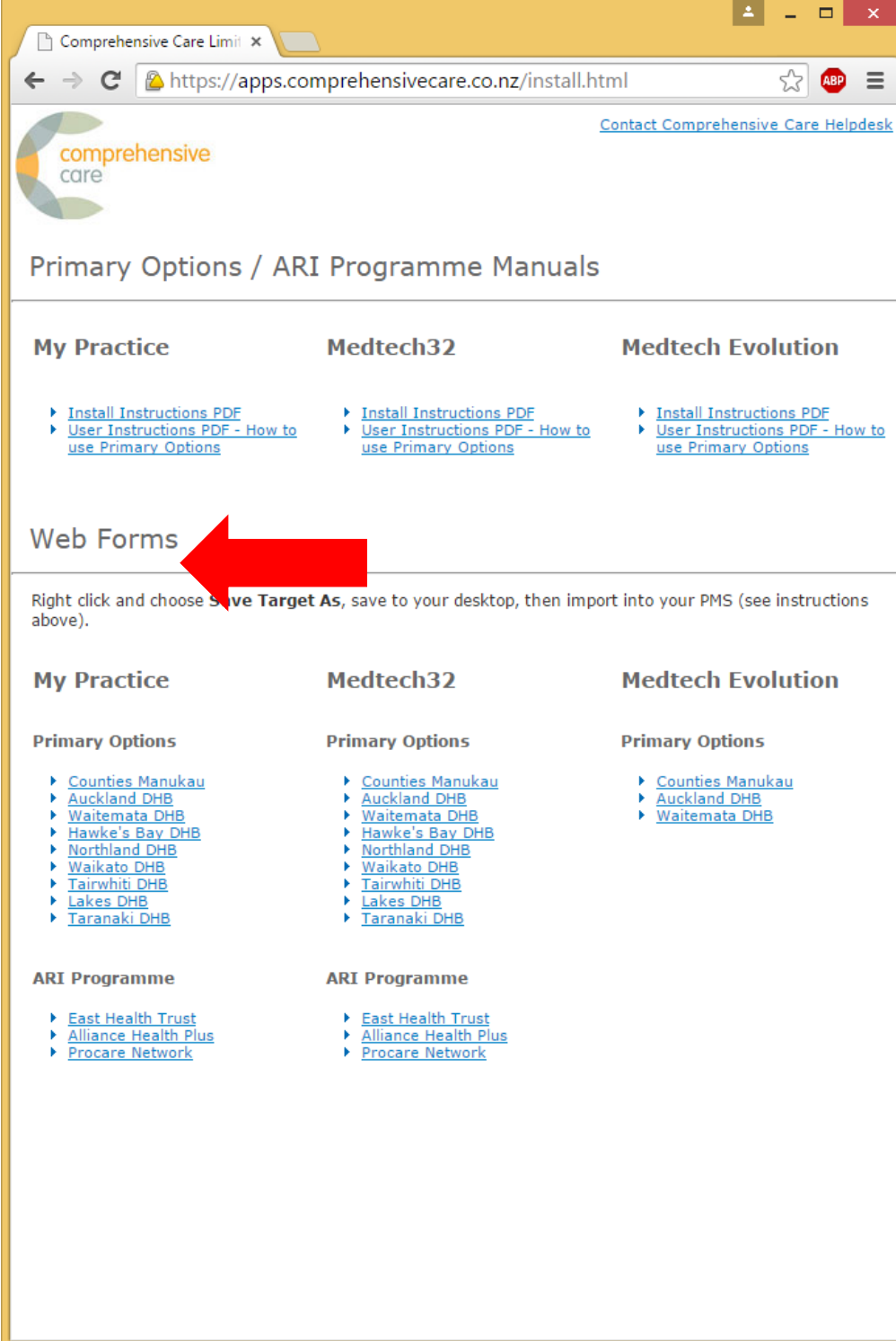
1. Click on the link to go to the installation page



Step two

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

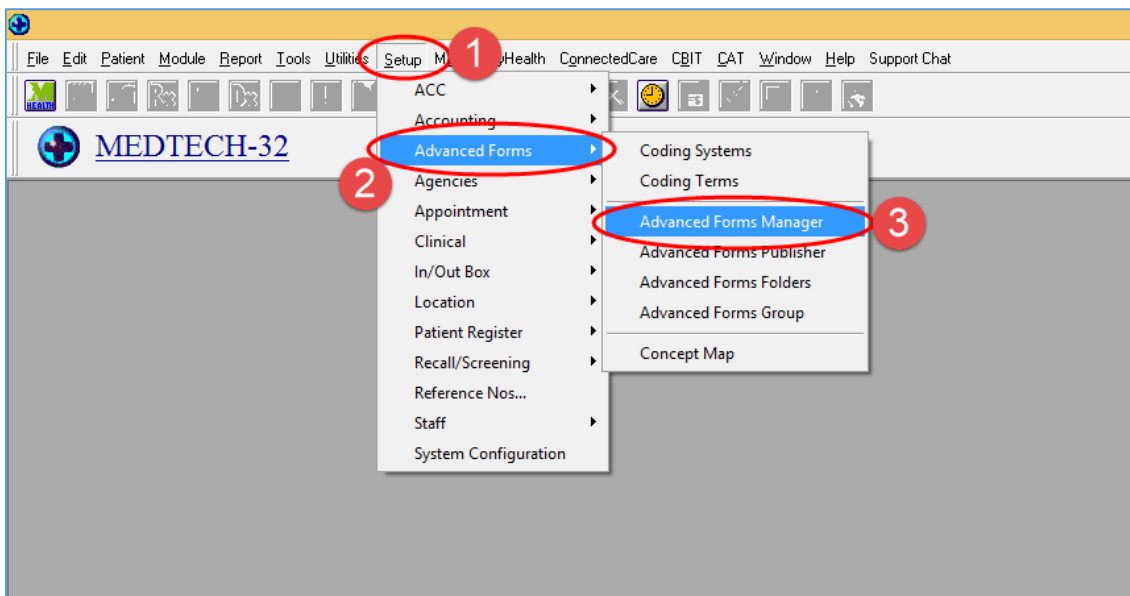
Then open your PMS



The screenshot shows a web browser window with the address bar displaying <https://apps.comprehensivecare.co.nz/install.html>. The page features the Comprehensive Care logo and a navigation link for the Helpdesk. The main content is titled "Primary Options / ARI Programme Manuals" and 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 "Web Forms" section is highlighted with a red arrow. This section includes instructions to right-click and choose "Save Target As" to download forms, followed by lists of links for "Primary Options" and "ARI Programme" under each of the three categories. The "Primary Options" lists include regional DHBs like Counties Manukau, Auckland, Waitemata, Hawke's Bay, Northland, Waikato, Tairwhiti, Lakes, and Taranaki. The "ARI Programme" lists include East Health Trust, Alliance Health Plus, and Procure Network.

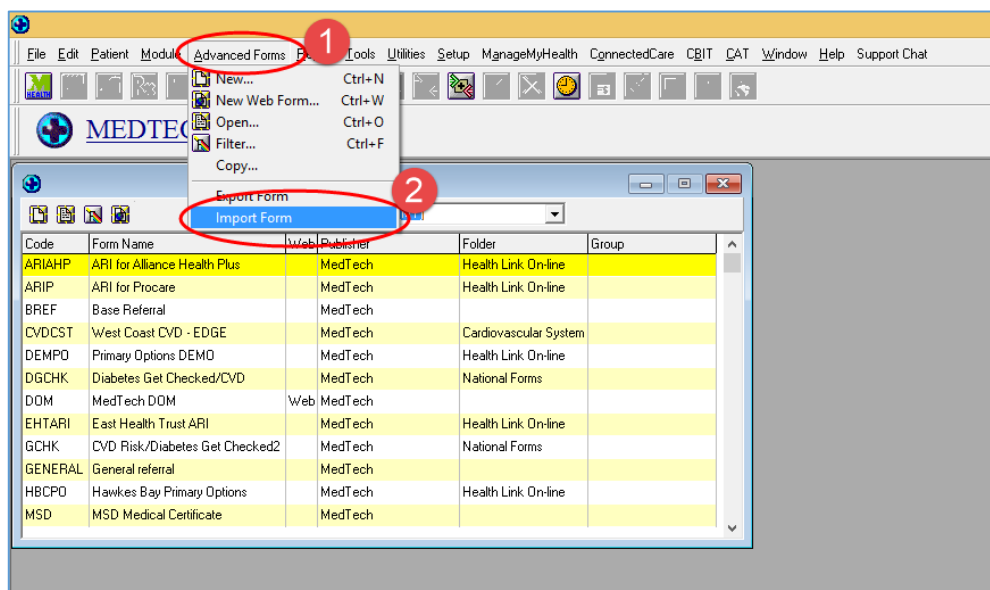
Step three

1. Select 'Setup'
2. Then select 'Advanced Forms'
3. Then select 'Advanced Forms Manager'



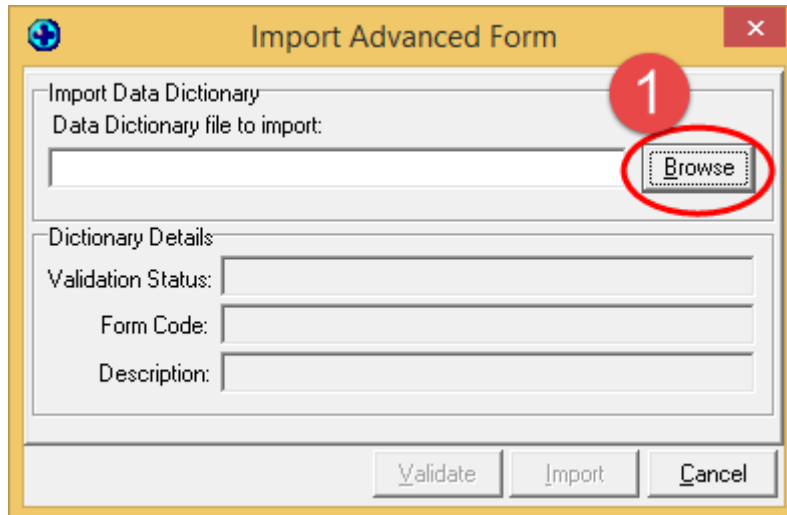
Step four

1. Select 'Advanced Forms'
2. Then select 'Import Form'



Step five

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



Import Advanced Form

Import Data Dictionary
Data Dictionary file to import:

Browse

Dictionary Details

Validation Status:

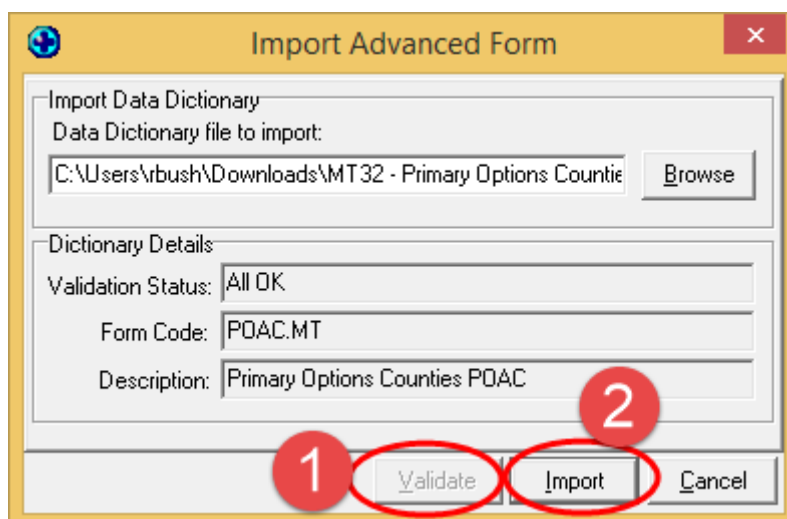
Form Code:

Description:

Validate Import Cancel

Step six

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 Browse

Dictionary Details

Validation Status: All OK

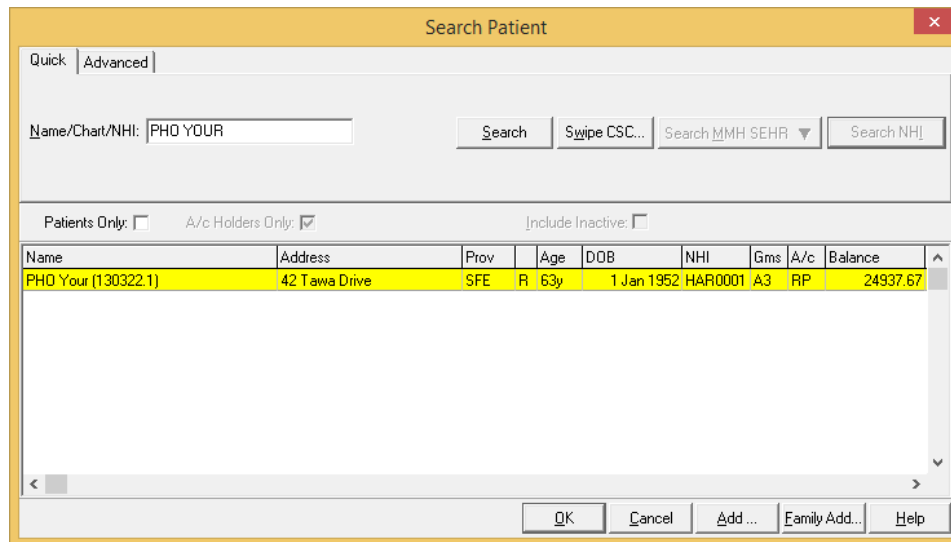
Form Code: POAC.MT

Description: Primary Options Counties POAC

Validate Import Cancel

Step seven

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



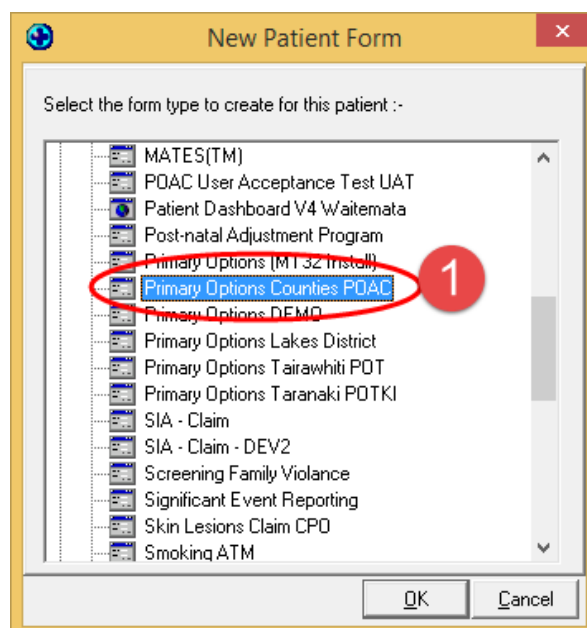
The 'Search Patient' window displays search results for 'PHD YOUR'. The results table is as follows:

Name	Address	Prov	Age	DOB	NHI	Gms	A/c	Balance
PHD Your (130322.1)	42 Tawa Drive	SFE	R 63y	1 Jan 1952	HAR0001	A3	RP	24937.67

Step eight

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

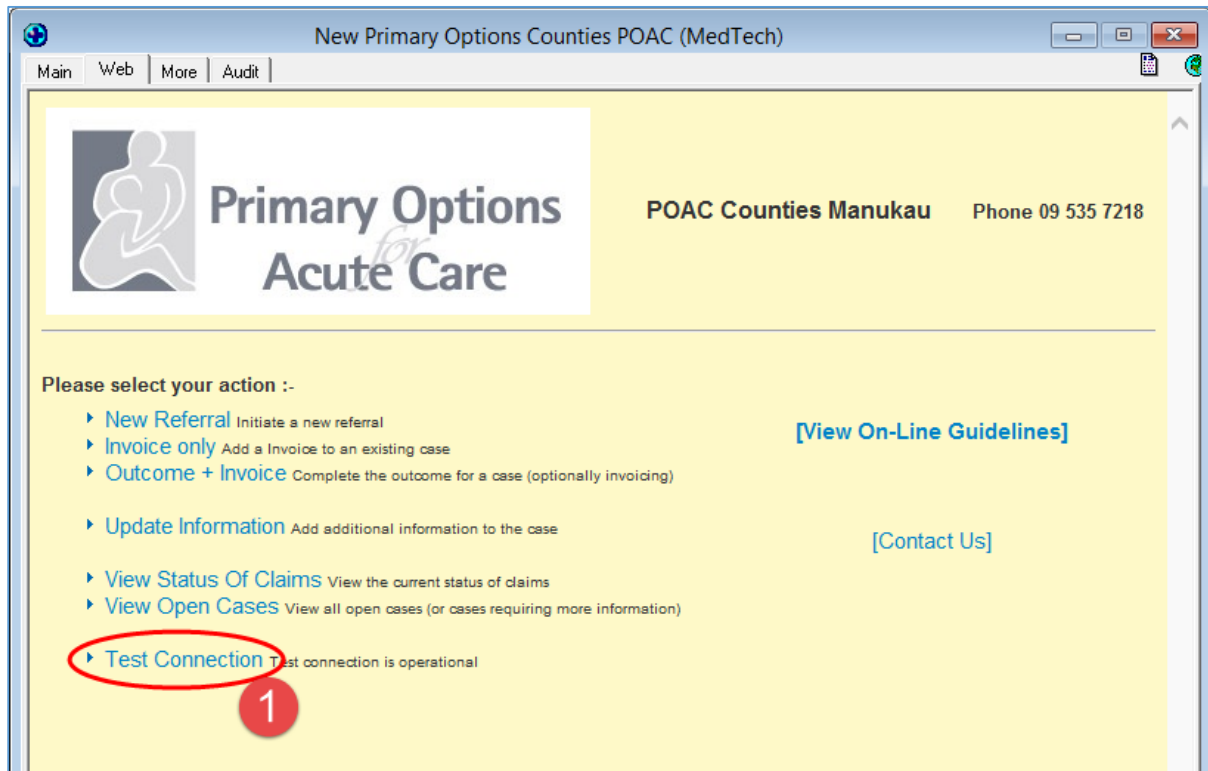
1. Double-click on the form you imported to open it (the name may differ from the one shown in the screenshot below)



The 'New Patient Form' window displays a list of form types to create for this patient. The form type 'Primary Options Counties POAC' is highlighted with a red circle and a red '1' in a circle, indicating it is the selected option.

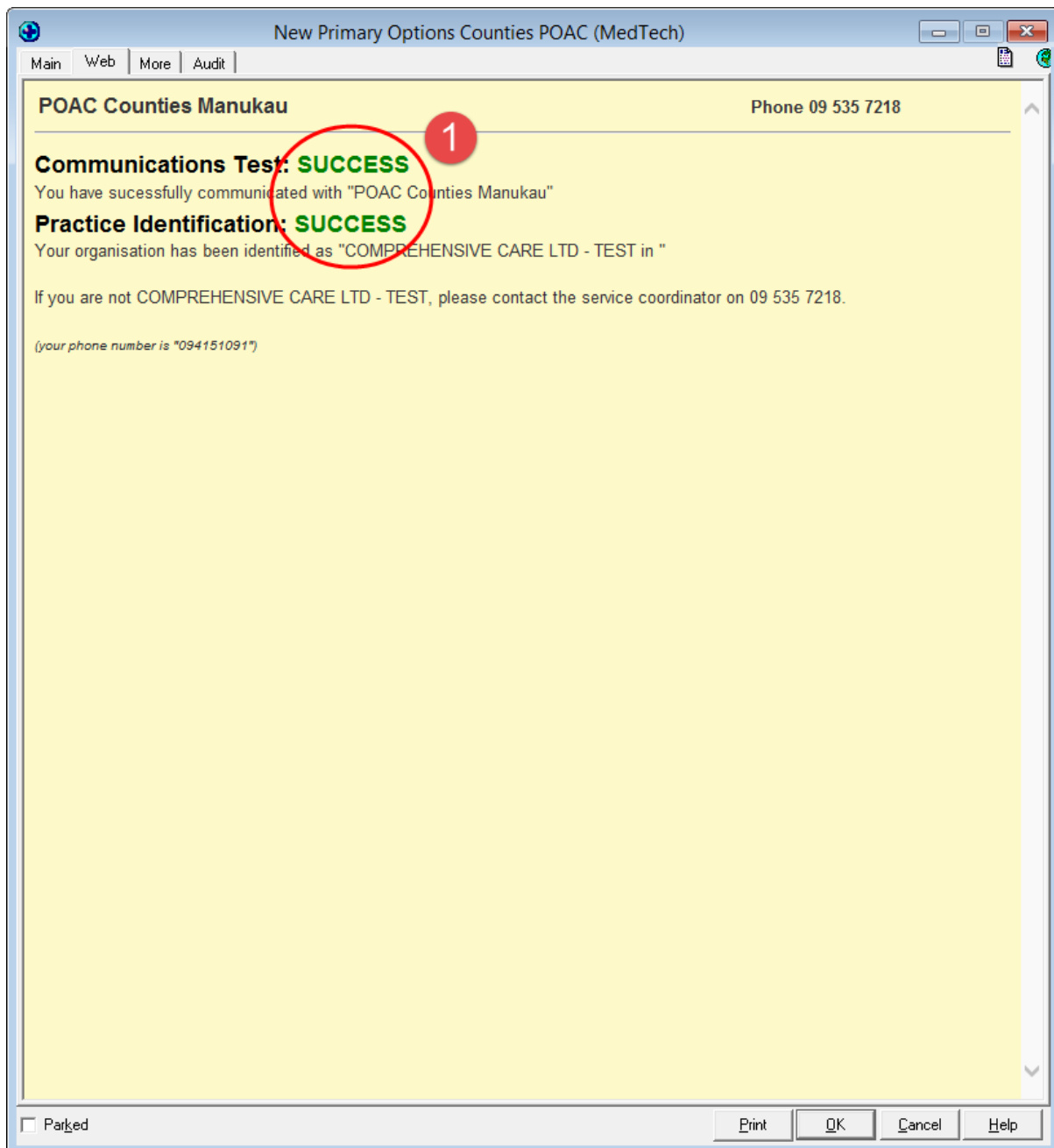
Step nine

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



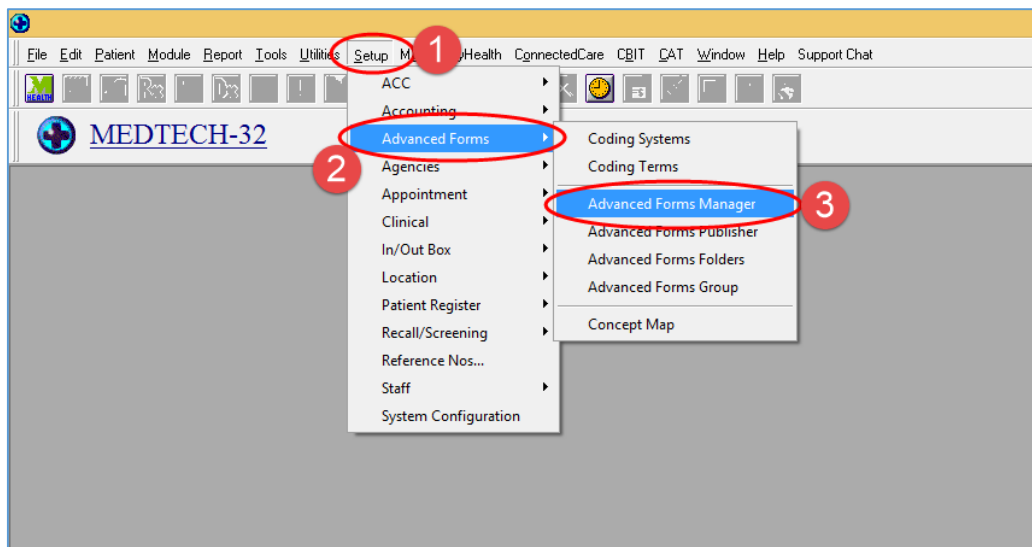
Step ten

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 eleven

1. Select 'Setup'
2. Then select 'Advanced Forms'
3. Then select 'Advanced Forms Manager'



Step twelve

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

The screenshot shows the 'Advanced Forms' window. The 'Publisher' dropdown is set to 'MedTech (MT)'. The table below lists various forms with their codes, names, publishers, and folders. The first row, 'POAC', is highlighted.

Code	Name	Web	Publisher	Folder	Group
POAC	Primary Options Counties POAC		MedTech	Health Link On-line	
POACDEV	POAC User Acceptance Test UAT		MedTech	Health Link On-line	
POAK	Primary Options Auckland		MedTech	Health Link On-line	
PODEMO	--- Primary Options DEMO		MedTech	Health Link On-line	
PODO	Primary Options - local		MedTech	Health Link On-line	
POLDH	Primary Options Lakes		MedTech	Health Link On-line	
POMHN	Primary Options Waikato		MedTech	Health Link On-line	
PONLD	Primary Options Northland		MedTech	Health Link On-line	
POOL	Primary Options On-line - OLD		MedTech	Health Link On-line	
POTDH	Primary Options Tairāwhiti POT		MedTech	Health Link On-line	
POTKI	Primary Options Taranaki		MedTech	Health Link On-line	
PTPO	Primary Options (MT32 Install)		MedTech	Health Link On-line	

Step thirteen

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

The screenshot shows the 'View Advanced Form' window for 'Primary Options Counties POAC'. The 'Actions' tab is selected and circled with a red '1'. The 'Create Invoice to Account:' checkbox is checked and circled with a red '2'. The account selection dropdown menu is open, showing a list of accounts, and the '...' button is circled with a red '3'.

Step fourteen

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

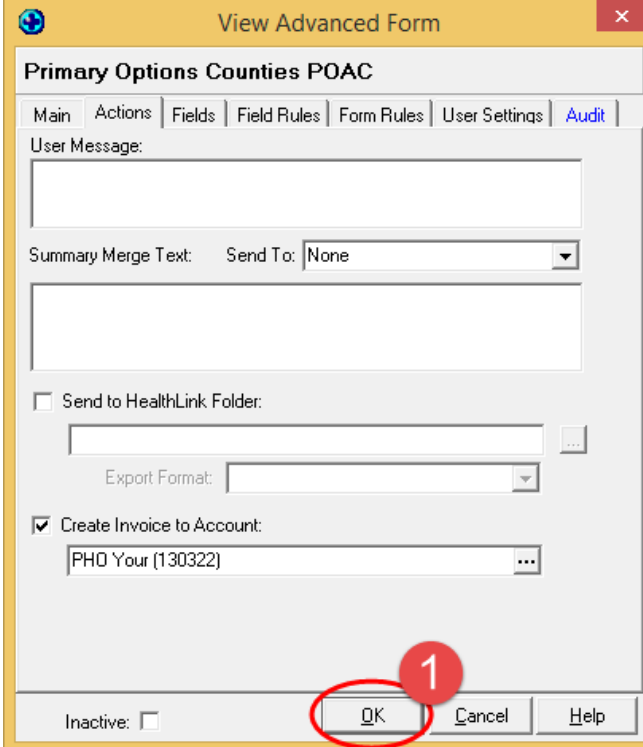
Select the account, then click on the 'OK' button to save

The screenshot shows the 'Search Patient' window. The search criteria are 'PHD YOUR'. The search results table shows one patient: PHD Your (130322.1) with address 42 Tawa Drive, SFE, R, 63y, 1 Jan 1952, HAR0001 A3, RP, and balance 24937.67. The 'OK' button is highlighted.

Name	Address	Prov	Age	DOB	NHI	Gms	A/c	Balance
PHD Your (130322.1)	42 Tawa Drive	SFE	R	63y	1 Jan 1952	HAR0001	A3 RP	24937.67

Step fifteen

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



The screenshot shows a software dialog box titled "View Advanced Form" with a close button (X) in the top right corner. The main title is "Primary Options Counties POAC". Below the title is a tabbed interface with tabs for "Main", "Actions", "Fields", "Field Rules", "Form Rules", "User Settings", and "Audit". The "Main" tab is active. The dialog contains several fields and options:

- "User Message:" followed by a large empty text area.
- "Summary Merge Text:" followed by a "Send To:" dropdown menu set to "None".
- Below that is another large empty text area.
- A checkbox labeled "Send to HealthLink Folder:" which is unchecked. To its right is a text field with a browse button ("...").
- An "Export Format:" dropdown menu.
- A checked checkbox labeled "Create Invoice to Account:". Below it is a text field containing "PHO Your (130322)" and a browse button ("...").
- At the bottom left is an "Inactive:" checkbox which is unchecked.
- At the bottom right are three buttons: "OK", "Cancel", and "Help". The "OK" button is circled in red, and a red circle with the number "1" is placed above it.