

Installing Primary Options for myPractice

9 July 2015

Step one

- 1. Go to <u>https://apps.comprehensivecare.co.nz</u>
- 2. Click on the link to go to the installation page



Step two

- 1. Download the appropriate XML file relating to the Patient Management System (PMS) and instance of Primary Options that relates to you
- 2. Then open your PMS



Step three

- 1. Select 'Tools' then;
- 2. Select 'Web Form Parameters' to open the URL Editor

		My Practice - 15.4.5599.31280
File View Tools Help	. 4 🕺 🛅 . 🗵 🗦 🍫 🚍 🗌	al 🙉 🦆 🗟 🖉 🍗
Staff +	New Appoint Tasks Patient Notes Account A	utotext Mail Results Scan Query Repeat
Demo × Contacts (Address Book)	9	
New Task (Downloads	V Marcus Welby	
Reports >		
Clinical Setup	9:15 9:30	
Text Message Log	9:45	
System Setup 🔸	System Settings	
Maintenance	Workstation Settings	
	Message Log	
	System Log	
	Clean Up +	
	Orug Groups	
Arrivals V ALL	My Import +	
Min Arrive A Pat	Notallation	
	Sy Local Mapping	
	Reference Tables	
	2 Synchronise	
(Web Form Parameters	
	2:45	

Step four

1. Select 'Import'

0					URL Editor:	-					×
						Search		Import 🄮	xport	🕢 Fini	ish 🗸
Na	me 🏻 🏹	Versio 7	Source	V	Base URL				Save	▼ Form	TV
+	Waitamata Primary	1	CHS		https://apps.comprehensivecar	e.co.nz/po_waitemata/	pms/in	tro	~		
	Care Plus Assessme	1	CHS		http://www.chs.co.nz/harbourh/	cplushh/cplushh.html			7		
	Alliance Health Plus 1 CHS h			https://apps.comprehensivecar	e.co.nz/ari_alliance_h	ealth/p	ms/intro	~			
	East Health ARI Pro	1	CHS		https://apps.comprehensivecar	e.co.nz/ari_east_healt	h/pms/	intro	~		
	Primary Options Tar	1	CHS		https://apps.comprehensivecar	e.co.nz/po_taranaki/pr	ns/intr	0	~		
	Primary Options Cou	1	CHS		https://apps.comprehensivecar	e.co.nz/po_counties/pr	ns/intr	0	~		
	Primary Options Tair	1	CHS		https://apps.comprehensivecar	e.co.nz/po_tairwhiti/pn	ns/intro)	•		-
	Description		ParameterName		MP Data	ReturnType		Required		SortOrde	er
								V			
+	PATIENT_SUBURB		PATIENT_SUBURB		Patient Address Suburb	Value		$\overline{\lor}$	1		
	PATIENT_DATE_OF_	BIRTH	PATIENT_DATE_OF_BIRTH	1	Patient Date of Birth	Value			2		
	PATIENT_NHI_NO		PATIENT_NHI_NO		Patient NHI	Value		$\overline{\lor}$	3		
	PATIENT_FAMILY_N	AME	PATIENT_FAMILY_NAME		Patient Last Name	Value		☑ 4			
	PATIENT_GIVEN_NA	MES	PATIENT_GIVEN_NAMES		Patient First Name	Value		\checkmark	5		
	PATIENT_GENDER		PATIENT_GENDER		Patient Gender	Value	V		6		
	PATIENT_ETHNICITY	(PATIENT_ETHNICITY		Patient Ethnicity Code	Value		$\overline{\nabla}$	7 7		
	PATIENT_STREET		PATIENT_STREET		Patient Address Line 1	Value	V 8				
	PATIENT_CITY		PATIENT_CITY		Patient Address City	Value		$\overline{\lor}$	9		
	ORGANISATION_PH	ONE	ORGANISATION_PHONE		Provider Phone	Value		$\overline{\mathbf{v}}$	10		
	PROVIDER_REG_NC)	PROVIDER_REG_NO		Registration Number	Value		$\overline{\lor}$	11		
	PROVIDER_GIVEN_N	AMES	PROVIDER_GIVEN_NAMES		Provider First Name	Value		$\overline{\nabla}$	12		
	PROVIDER_FAMILY_	NAME	PROVIDER_FAMILY_NAME		Provider Last Name	Value		$\overline{\checkmark}$	13		
	PMS		PMS		PMS and Version	Value	1	$\overline{\nabla}$	14		
*								V			

Step five

- 1. Select the XML file you download in step two
- 2. Click on the 'Open' button



Step six

If you previously had the form installed, you need to remove the out-dated form.

Select the out-dated form, by clicking on the grey box to the left of the form name, then press the delete key on your keyboard

-	🐖 URL Editor: – 🗖 💌									
						Search		Import 🅑	Export 🕢	Finish 🗸
Na	me	V	Version V	Source V	Base URL V Save V Form Type					m Type 🔽 🔒
	Primary Options Auckland		1	CHS	https://apps.comprehensivecare.co.nz/po_auckland/pms/intro					
	ARI Programme		1	CHS	https://apps.comprehensivecare.co.nz/ari_procare/pms/intro			~		
	y Options Lakes DHB		1	CHS	https://apps.comprehensivecare.co.nz/po_lakes/pms/intro					
2	P imary Options Counties POAC		1	CHS	https://10.192.150.1/poac/pms/intro			v		
\sim	Primary Options Counties POAC V2		1	CHS	https://apps.comprehensivecare.co.nz/pd	o_counties/pms/intro		~		
*										
										-
í-	Description	F	arameterName		MP Data	ReturnType	Required		SortC)rder
							지 🔲			
•	PATIENT_SUBURB	PATIENT_SUB	URB		Patient Address Suburb	Value		1	1	
	PATIENT_DATE_OF_BIRTH	PATIENT_DAT	E_OF_BIRTH		Patient Date of Birth	Value				
	PATIENT_NHI_NO	PATIENT_NHI	NO		Patient NHI	Value	<u></u>			
	PATIENT_FAMILY_NAME	PATIENT_FAM	ILY_NAME		Patient Last Name	Value				
	PATIENT_GIVEN_NAMES	PATIENT_GIVE	EN_NAMES		Patient First Name	Value	M	5		
	PATIENT_GENDER	PATIENT_GENDER			Patient Gender	Value	V	6		
	PATIENT_ETHNICITY	PATIENT_ETH	NICITY		Patient Ethnicity Code	Value				
	PATIENT_STREET	PATIENT_STR	EET		Patient Address Line 1	Value	V			
	PATIENT_CITY	PATIENT_CITY	(Patient Address City	Value	V	9		
	ORGANISATION_PHONE	ORGANISATIC	NISATION_PHONE		Provider Phone	Value	V	10	(
	PROVIDER_REG_NO	PROVIDER_R	EG_NO		Registration Number	Value		11		
	PROVIDER_GIVEN_NAMES	PROVIDER_G	VEN_NAMES		Provider First Name	Value	V	12	1	
	PROVIDER_FAMILY_NAME	PROVIDER_FAMILY_NAME			Provider Last Name	Value	V		l.	
	PMS	PMS			PMS and Version	Value		14		
*							N			

Step seven

Click on the 'Yes' button



Step eight

To search for a test patient, press $\ensuremath{`F_2'}$ and then select a test patient

•				Search Res	sults - 1	items found				- 5	×
	F2 bar	nner		9	• Na	me/DOB/NHI	Show Inactive 🌱	<u>N</u> ew 😋 P	rint 🦕	<u>C</u> ancel 样	<u>O</u> k 🗸
Last Name	/ First Name	/ Birthdate	Sex	NHI	Chart	Address	Pra	ctiti Enrolled	Seen	Create	ed
Click here	to filter	01/01/1070		7770050						07/05	0015
Banner	Bruce	01/01/1950	М	2220059			Der	no		07/05/	2015

Step nine

Select 'Clinical Notes'

d		My Practice - 15.4.5599.31280 Ma	rcus Welby
File <u>V</u> iew Tools	Accounts Help	nt Tasks Patient Notes Account Autotext Mail Results Scan Query Repeat Staff Contacts ScrapBook	
Demo 🗙			
ly Tasks and Messages 🧕	Waiting Room	Marcus Wolby	
🕽 New Task (Alt+Q)	E2 Mr Bruce Banner American (US)	Vindeus Weiby	ly
	1/01/1950 Age 65 Demo	9:15	
	Regular ZZZ0059	9:30	
	No Address	9:45	
	no prei contact	10 am	
	and a second	10:15	
	Not Seen vet Not Enrolled	10:30	
	Outstanding Balance \$153.00	10:45	
	Careplus Patient Details	11:00	
	Appointment Hi	11:15	
	Clinical Notes	11:30	
	Assounts	11:45	
	Results Societe	12 pm	
		12:15	
	Amvais V ALL Valk In	12:30	
	Min Arrive A Patient	12:45 0 Appoint	ments
		1:00	
		1:15	
		1:30	

Step ten

- 1. Select 'Forms'
- 2. Then, in the 'WebForms' box, double-click on the form you downloaded in step two



Step eleven

Once the form has opened, select 'Test Connection'

W		My Practice - 15.4.5599.31280	Marcus Welby		- 15 ×
File View Tools Accounts Heb	age New Appoint Tasks Patient Notes Account a	al 🧑 🤞 🎲 🌾 🕺	Contacts Scrap Book		
Demo Notes - Barrer, Bruce X Mr. Ed Kett Steetar:	Bruce Banner Carelus 1/US1 1/01/1950 gular Deno ZZZ0059 65y 6n			Consultation 0607/2015 04:55 P v Consultation v Author Authorited by Marcus Weby Marcus Vielby v	Right Sidebar () Finish & Finish+Bill (F12) () New Task (Alt+Q) Tasks 2
Nges h	Pesults Measurements Scripts Lab Badiol Cardiol Endo Au	tio Lefters Eorms Imms/Meds Primary Options Counties PO	HC	LL O Develop	Smoking status
	Letter v tilbe contrave is acoustic to voi by Door and building a 1,54,45			Contrast Contrast	Body Mass Index Alcohol status
ł	Primary Options Acute Care		POAC Counties Manukau	Phone 09 535 7218	Other Tasks 8
Pleas , ,	e select your action :- New Referral Instate a new releval Invoice only Add a twolaw to an existing saw Outcome + Invoice Compass the outcome for a case toptionally invoice	ing)	[View On-Line Guide	lines]	
	Update Information Add additional internation to the case View Status Of Claims View the current status of claims View Open Cases View all open cases (or cases requiring more inform	tion)	[Contact Us]		
• •	Test Connection Tre connection is operational				
					Fost It Note Accounts Preview
Family Members					Print (CB+P) Print Current Notes
					Save Now (Cli+S)
				~	Create Appointment

Step twelve

- 1. You should see success (as per screenshot below). If you don't see this, please contact your Primary Options Coordinator.
- 2. Close the form without saving, by clicking on the 'Cancel' button.

