MINISTRY OF
HEALTH
MANATŪ HAUORA

PRIMHD

Programme for the Integration of Mental Health Data

NGO Web Data Entry System User Manual

Prepared By: Information Directorate

Date: 21 May 2009

Version: 1.0

Document Control

Document Information

Project	Programme for the Integration of Mental Health Data
Project Number	1673
Team	Business Analysis Team, Solutions Delivery Group
Document Type	User Manual
Title	NGO Web Data Entry System User Manual
Folder	PMO0228 Programme for Integration of Mental Health Data (PRIMHD)\Project Stage 7.0 - Project in Progress & Project Reporting\PRIMHD Technical Documents
Author(s)	Terry Ashcroft
Version	1.0
Status	final

Document History

Date	Version	Description of Changes
10/03/09	0.1	Draft for peer review by Tim Mepham
16/03/09	0.2	Contributors for feedback
23/03/09	0.3	After feedback and later, non-final screens
16/04/09	0.4	Major Screen layout and flow changes
30/04/09	0.5	Another set of screen changes
12/05/09	0.6	Another set of screen changes and reorganization of presentation
21/05/09	1.0	Final

Associated Documents

Document Name	Location
File Specification	http://www.nzhis.govt.nz/moh.nsf/pagesns/507
HISO Integrated Mental Health Data Process Standard	http://www.hisac.govt.nz/moh.nsf/pagescm/7472
HISO PRIMHD Code Set	http://www.hisac.govt.nz/moh.nsf/pagescm/7472
HISO PRIMHD Data Set	http://www.hisac.govt.nz/moh.nsf/pagescm/7472
Software Training Manual for NGOs Using Web Based Forms	*** to be advised **

Document Contributors and Reviewers

Name	Ministry Title	Information Directorate Group
Michelle Golding	Applications Trainer	Relationship Management Group
Jenny Hurunui-Angus	Data Quality Auditor/ Analyst	Sector Services Group
Paromita Sen	Systems Analyst	Solutions Delivery Group
Robin Luo	Java Developer	Systems Development
Tim Mepham	Business Analyst	Solutions Delivery Group
Tony Griffiths	Senior Business Analyst	Solutions Delivery Group

Document Sign-off

Tony Griffiths

Team Leader, PRIMHD National Rollout Team
Information Directorate

……/……/…………
This signature indicates that the Team Leader is
satisfied with the quality of this document in
terms of:
• Completeness
• Testability

Angela Pidd

Team Leader, Data Management Services
National Collections
Information Directorate

……/……/…………
This signature indicates that the Team Leader
is satisfied with the quality of this document in
terms of:
• Completeness
• Usability

Table of Contents

1   Introduction

This introduction covers:
- the purpose of this user manual and its structure
- assumptions
- how to get updates and more help.

1.1   Manual Purpose and Structure

This manual's purpose is to provide supporting information for trained users of PRIMHD's NGO Data Entry System.

This is not a training manual. Rather this manual is a reference document structured to present most material only once. The major sections are:
- Section 3 System Concepts
- Section 4 Detailed Screens
- Section 5 Terminology
- Section 6 System and Technical Items.

1.2   Assumptions

This user manual assumes the user has:
- a full understanding of referrals, activities and PRIMHD coding
- worked through the "Training Manual for NGOs Using the Web Data Entry " – see Associated Documents (page 2)
- the users have their own relevant browser training and reference material
- system access as stated in section 6.1 Prerequisites for System Use.

It is also assumed that:
- as the error messages are self-explanatory they will not be covered in this manual. They are also defined in the File Specification – see Associated Documents
- this manual will be distributed in a folder along with the Training Manual and other supplementary information like common codes, a reminder of the need to be training, each user must use their user id, …

1.3   Updates to this Manual and Supporting Documentation

This manual, supporting documentation and any updates are available – see Associated Documents.

1.4   Help

Help can be obtained from the Ministry of Heath Information Directorate's Help Desk.

For help with adding a new user, understanding the system, a data problem etc, please email primhduserinterface@moh.govt.nz. Clicking the support link at the top of the screen automatically opens an email to this address.

For help with technical problems, eg system availability or network problems, please phone 0800 505 125.

2   System Overview

The section about the NGO Web Data Entry System explains:

- that this system is part of PRIMHD
- this system's purpose
- this system's availability
- the user's responsibilities.

2.1   This System is a part of PRIMHD

The NGO Web Data Entry System is a part of PRIMHD. PRIMHD is the Programme for the Integration of Mental Health Data (PRIMHD).   The purpose and objectives for this program are defined in sections 7.4 and 7.5. An essential requirement of this system is that Non-Government Organisations (NGOs) provide mental health data.

NGOs can supply their data to PRIMHD via:

- this NGO Web Data Entry System; or
- electronic extracts – not many NGOs use this method, which is defined in other documentation.

2.2   Purpose

This system's purpose is to enable NGOs to enter their PRIMHD data via the internet.

2.3   System Availability

The targeted system availability is 24 hours per day, 7 days a week.

Support for queries and assistance will be available during normal office hours.

Two or more users from the NGO can use the system at the same time, but each user must each work on separate referrals.

2.4   User Responsibilities

PRIMHD requires everyone to meet their responsibilities. For the NGO data entry, the user responsibilities are to:

1. **load data by 20th of the following month**
   All data should be provided by the 20th day of the following month (for example, January 2008 data would be required by 20 February 2008). Providers may submit data more frequently as appropriate

2. **accurately enter data**
   While the system can often detect invalid values, it is not always possible to detect that an incorrect valid value has been used – eg the system can detect if a non existent NHI number has been used, but not that somebody else's number has been used

3. **be trained in the use of this system**

4. **be able to use their web browser**
   The user must be competent with their own browser.

3   System Concepts

This section defines the key concepts that underpin the use of the system:
1. key data items
2. screen characteristics
3. saving and submitting records
4. work flow.

3.1   Key Data Items

This system's data is about consumers, referrals, activities and teams. Although these items are described in 5.2 Glossary, users are assumed to be familiar with them.

The relationships between this data is also important:
1. a consumer via referral can access services for a mental health or alcohol and drug use issue
2. a team conducts the referral
3. each referral consists of some activities
4. a referral may cause a referral to another team.

This diagram shows these relationships:
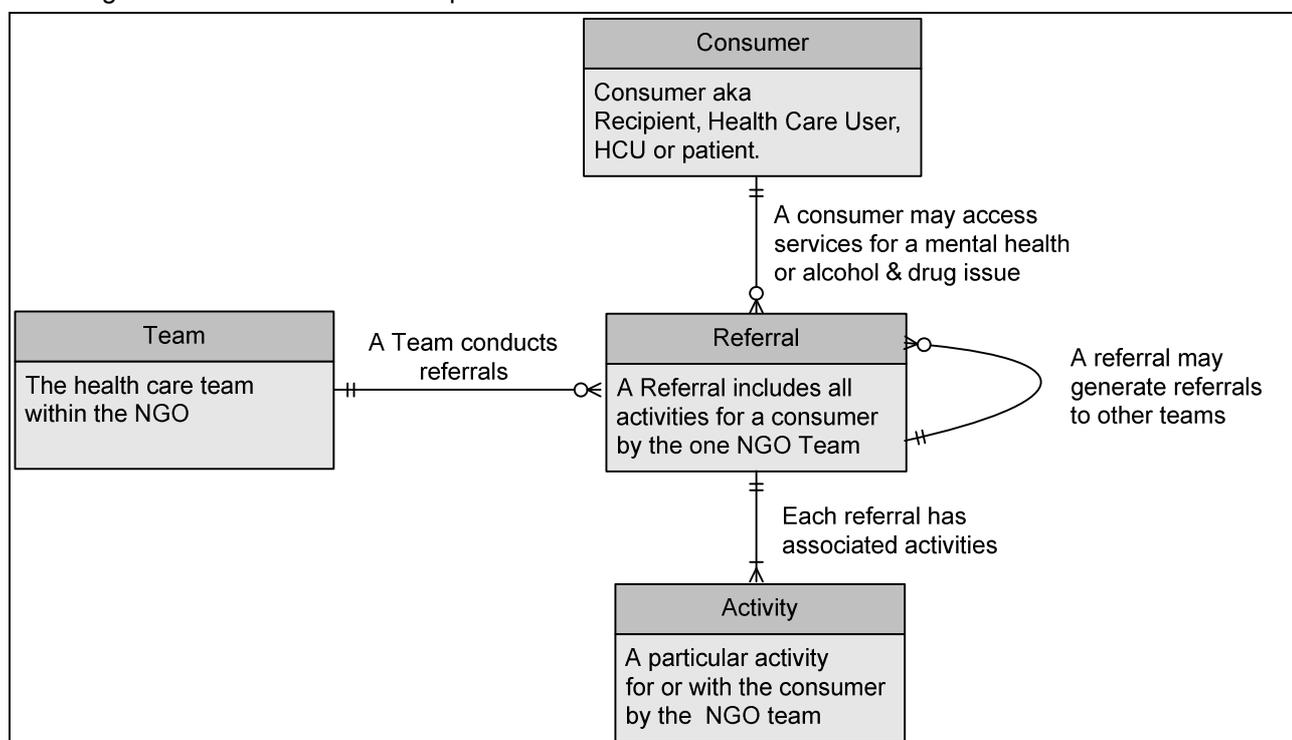
A record is required for each referral or activity. Also a referral record must be created and saved before any corresponding activity records can be created.

3.2 Screen Characteristics

This section describes common screen characteristics.

3.2.1 Screen Buttons

Different screens have different buttons eg {SAVE}, {Submit for Processing} and {Search}. Generally these are described with each screen.

3.2.2 Screen Tabs

There are these tabs (sub-screens). They are listed as they appear from left to right on the screen. Selecting a tab is similar to pressing a button.
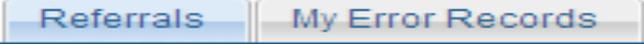
Tab	Comment
{Referrals}	This switches to the referral search screen where the user has the option of searching for an existing referral or creating a new referral.
{My Error Records}	This lists all referrals with errors that need to be corrected and re-submitted.

The current tab the user is working on is blue – ie a different colour to the others. Clicking one of the other tabs transfers control to that tab. When transferring from one tab to another, data may be lost.

3.2.3 Record Key Click

In some cases clicking on a specific record key, eg a referral number, transfers control to a new screen where the record can be viewed and possibly altered.

3.2.4 Entering Data for Individual Fields

As a record is created or updated, individual field values are entered.

Some fields have dropdown lists which list all possible values.

Date entries have a calendar dropdown. Within that there are dropdowns for the month and year.

Fields with a double asterisk, **, are mandatory and a value must be entered.

As well as the editing specified with the individual fields – see 5.1, there are also commonsense editing rules like bed-night activities cannot take place over the phone. These are defined more fully in the File Specification – see Associated Documents.

3.2.5 Going to Another Field

After completing a field, the user can use the tab key or the mouse to go to another field.

3.2.6 Records Requiring Attention

Where a list of referrals or activities is displayed, a blue and white circle in the left hand column of the record indicates the referral is saved, but either it needs to be submitted or it has "submit" errors.

eg

○ NGOWEBACT0000166 T02	ED	13AABW	2009-01-08T07:00:00

3.3   Saving and Submitting Records

There are two slightly different business requirements:
1. to **save** each record as its data is entered. This also subjects the record to some preliminary editing
2. to **submit** a referral and its activities for PRIMHD processing. This includes the application of the standard PRIMHD editing – ie the same as applied to data loaded electronically from a DHB.

3.3.1   Saving Each Record

Saving a Record
Saving a record initiated by clicking the **{SAVE}** button does a preliminary edit check of the entered data – eg checks for missing mandatory fields. If there are no errors, the record is stored for the **submit** processing.

Each record must be saved, before work on another record can be started.   Also a user can only start an activity after first entering and saving its referral record.

Unsaved data will be lost if the system or network, etc fails.

Record Saving
During a save the system provides the ID for any new record that passes the preliminary check. The activity screen is refreshed and the record is listed with other corresponding records.

Save Errors
If any errors are detected as a save is attempted, the errors are redisplayed on the screen below the offending field.

If there are save errors:
*   the user can correct the errors or **{CANCEL}** the attempt to enter this data.
*   the record will not be saved and the record will not be given an ID.

3.3.2   Submitting a Referral and its Activities

Submitting Records
Saved records need to be submitted for PRIMHD processing. Clicking **{Submit for Processing}** initiates for the selected referral:
*   savesany unsaved record – there can only be one at the most
*   checks the data for more errors – eg an unknown NHI
*   provides the data for error free records to PRIMHD. Activities will only be provided if the referral record is error free. The referral record may have been submitted earlier.
    PRIMHD then makes the records available for analysis and reporting.

Group Sizes
The user can do a **{Submit for Processing}** after successfully saving each record.

However the submit option allows the group to process a batch of records for a referral before providing the data for PRIMHD processing.

Submit Errors
Errors for the current referral are immediately displayed.

Errors for other submitted referrals can be examined and fixed using the **My Error Records** tab.

In order to meet the requirement for accurate data, all data must be submitted and errors must be cleaned up.

3.4   Workflow

During each user session, the flow of work consists of:
1. *logging in (***must be done****)*

the data work which can include any number of these items:
2. *creating a new referral and some associated activities*
3. *editing an existing referral and its activities. This could include adding extra activities as well as deleting the referral or selected activities*
4. *selecting a referral record with errors for further action*

then:
5. *logging out (***should be done****).*

At various times records can be **saved** or **submitted**. Some validation is done as part of the **save** and more as part of the **submit**. This is detailed in 3.3 "Saving and Submitting Records".

This diagram illustrates expands on the above by showing the detailed record handling (except for deletion).
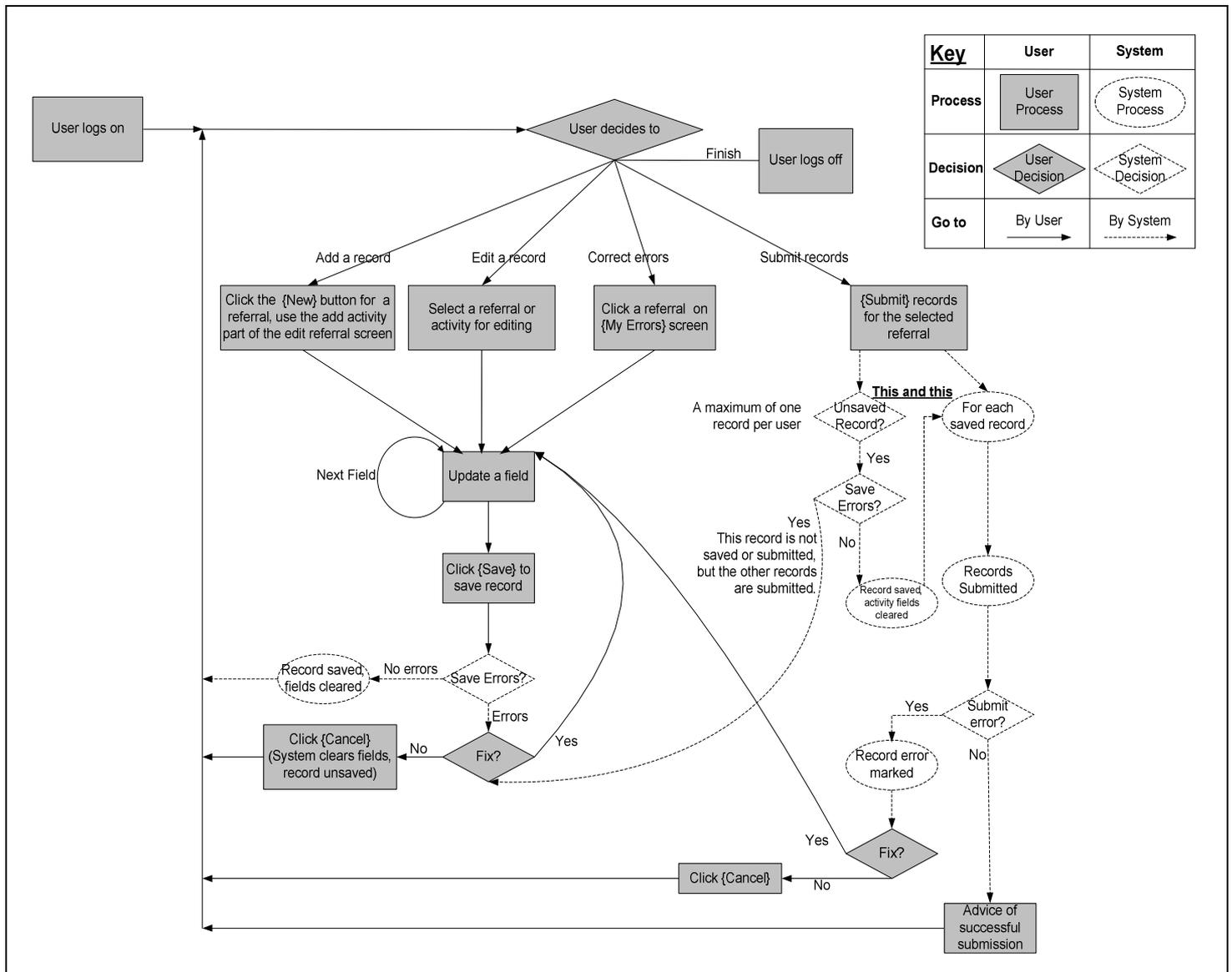
There is more detail in:
- section 4 Detailed Screens
- section 5 Terminology
- section 6 System and Technical Items.

4   Detailed Screens

This is a web-based application and all the work is done via the system's screens.

There is a sub-section for each of the main screens:
1. logging in
2. "Referrals" (and activities)
3. "My Error Records" - working with error records
4. logging out.

In case you are just referring to this section, please note that:
- 3.2 Screen Characteristics provides complementary information
- **Record Key Click** means click on a record in the list
- the self-explanatory error messages are defined in the File Specification – see Associated Documents
- as well as the editing specified with the individual fields – see 5.1, there are also commonsense editing rules like bed-night activities cannot take place over the phone. These are also defined more fully in the File Specification.

4.1   Logging In

To log into the PRIMHD system, click in the **Username field** and type your code (that will have been supplied to you by the Ministry of Health System Administrators) and your **Password** (which appears as a series of dots rather than letters). Click on **Login** to enter the system.
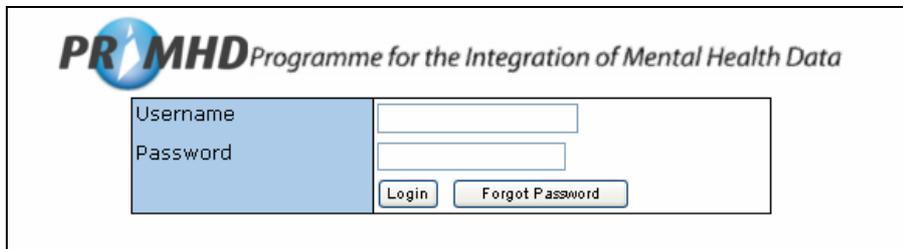
The {Forget Password} functionality is still to be introduced

The first time the system is accessed, a screen will appear prompting you to change your password.
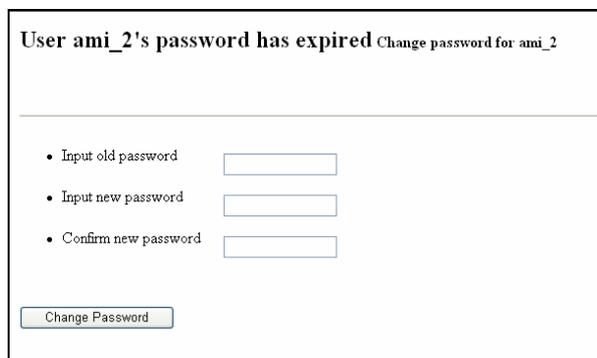
Enter your old password and your new password and then reconfirm your new password and click **{Change Password}**. This confirmation screen will appear:

If a user just ceases to use the screens, they will eventually be logged out – in this case they will be prompted to log on again when they go to use the system.

It is important and necessary that passwords must:
- be kept confidential at all times
- not be shared.

4.2   Referrals

This section has a series of screens.

4.2.1   Search Referrals (Also Start Screen)

This search screen appears after the user has logged on or clicked the referral tab.
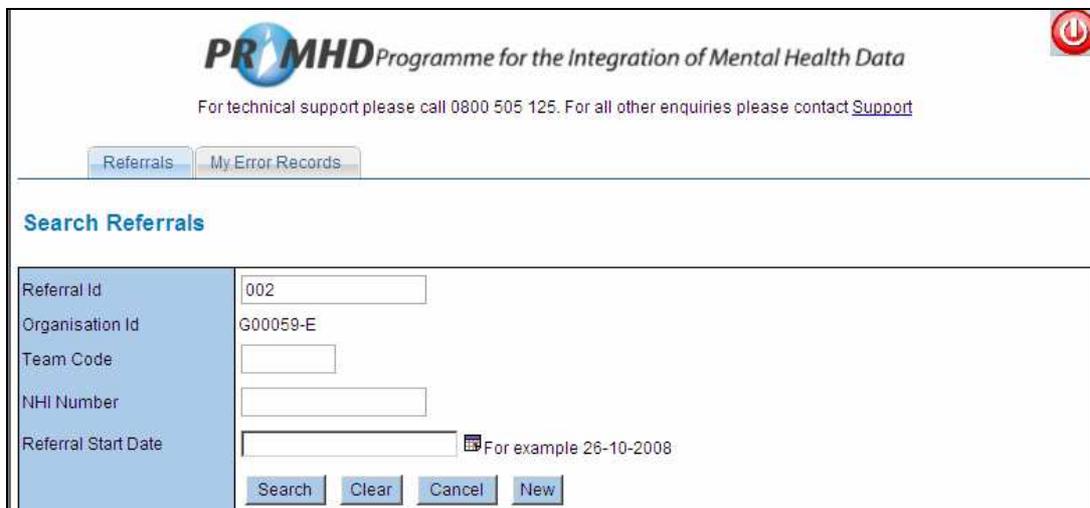
Function	Get a referral to work with.
Data Entry Notes	Clicking on a field can result in a dropdown of previously used entries. Wild card entry is possible for referral id. In the above screen shot, **002** was used as a wildcard entry in the search, and so all the organisation's referrals containing **002** were returned (See 4.2.2 Search Screen (Results))

Button Functions	Button	Function
	{Cancel}	Clears both the search entries and the search result
	{Clear}	Clear all the entries for a search
	{New}	Start a new referral. Goes to 4.2.3 View Referral
	{Search}	Triggers a search for all referrals meeting the specified criteria. Uses wild card criteria with a blank meaning all values. So a search with all blanks returns all referrals for an organisation

Record Key Click	Not Applicable for starting a search
Get here from	1. 4.1 Logging In; or 2. At anytime by clicking the **{Referrals}** tab

4.2.2   Search Screen (Results)

After a search is executed, results appear below the preceding screen's search entry.

Referral Search Result

|◄ ◄◄ ◄ **1** 2 ► ►► ►|

Referral Id ▲	Team Code	NHI Number	Referral Start Date	Referral End Date
NGOWEBREF000002240	7312	DML8701	01-04-2009	
NGOWEBREF000002241	7314	DML8701	01-04-2009	
NGOWEBREF000002242	7312	LEF0952	01-04-2009	
NGOWEBREF000002260	7315	EVR3413	09-08-2008	10-04-2009
NGOWEBREF000002265	7315	PTT8053	09-10-2008	
NGOWEBREF000002266	7315	MSZ3915	27-12-2008	
NGOWEBREF000002267	7315	MSQ6184	14-04-2009	
NGOWEBREF000002268	7315	LDQ9776	09-10-2008	
○ NGOWEBREF000002280	6300	PXQ8144	01-04-2009	
NGOWEBREF0002200	7322	ESA0583	08-07-2008	11-02-2009

19 records found, displaying 10 records, from 1 to 10. Page 1 of 2

Function	From the list of referrals which match the search criteria, select a referral to examine or work with.
Data Entry Notes	Not applicable for results, but the search functionality per 4.2.1 Search Referrals (Also Start Screen) can start another search.
Button Functions	Not applicable for results, but the search functionality per 4.2.1 Search Referrals (Also Start Screen) can start another search.
Record Key Click	After a search returns values, click the desired referral in the result screen. Control transfers to 4.2.3 View Referral
Get here from	4.2.1 Search Referrals (Also Start Screen)
Usually go to	To work with 4.2.3
Other Comments	1. The page number selection facilities to view the search results are |◄ ◄◄ ◄ **1** 2 3 4 5 ► ►► ►| The paired arrow functions are: • |◄ to go to the first page - its opposite symbol goes to the last page • ◄◄ to go 5 pages left • ◄ to go one page left 2. The blue and white circle on the left shows the activity record is unsubmitted or it has errors 3. Also shown is the count of selected records (100), the number of pages (10) and the page being displayed (1). The user can click on a page number to go directly to that page. 4. The referral colour banding is: • Dark Blue – the last referral looked at • Light Blue - the referral result the cursor is positioned on
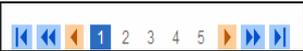
4.2.3   View Referral

Function	Display the referral and its activities. Also leads to editing or deletion of the referral and its activities.
Data Entry Notes	Not Applicable

Button Functions	Button	Function
	{Cancel}	Transfers the user back to the search screen.
	{Delete}	After confirmation, the referral and all its associated activity records are deleted
	{Edit}	Transfers to editing of a referral (4.2.4 Edit Referral: Part 1: Editing a Referral)

Record Key Click	Not Applicable
Get here from	4.2.2 Search Screen (Results)
Usually go to	either: • 4.2.4 Edit Referral: Part 1: Editing a Referral using {Edit} ; or • another referral by clicking the referral tab. This displays the last search results.
Other Comment	A blue and white circle on the left shows the activity record is unsubmitted or it has errors.

4.2.4 Edit Referral: Part 1: Editing a Referral

Function	Edit a referral. This includes deleting the referral. This screen is also used for editing activities – see the next page.
Data Entry Notes	Mandatory fields are shown with an **. Rules defining what values to enter if the actual time is unknown are given in section 5.1 Screen Fields on page 23 .

Referral Button Functions	Button	Function
	{Cancel}	The Referral {Cancel} transfers the user back to the 4.2.3 View Referral screen. All work since the last save is lost.
	{Save}	Saves the referral record without submitting it. This may result in the display of errors which will need to be corrected
	{Submit for Processing}	Submits all unsubmitted data. See 3.3 Saving and Submitting Records.

Record Key Click	Editing of an activity is triggered by clicking the mouse over the activity
Get here from	4.2.3 View Referral
Usually go to	The last search results – do this by clicking the referral tab. By clicking {Submit for Processing} control switches to: • 4.2.7 Referral Accepted by PRIMHD(if no errors) • 4.2.8 Referral Rejected by PRIMHD (if an error is detected).
Other Comment	The blue and white circle shows the activity record is unsubmitted or it has errors.

4.2.5   Edit Referral: Part 2: Adding an Activity

This repeats the "Add New Activity" area from the previous screen

Edit Activity

Activity ID	NGOWEBACT000002701
Start Date Time	10-10-2008 15 : 15 **
End Date Time	10-10-2008 23 : 45
Activity Type	(T01) Mental health crisis attendances **
Activity Setting	(CR) Community Residential **
Health Care Worker CPN	

** indicates mandatory fields

Save   Delete   Cancel

Function	Adding an activity record is possible when editing a referral and no activity record has been selected for editing
Data Entry Notes	Mandatory fields are shown with an **. Rules defining what values to enter if the actual time is unknown are given in section 5.1 Screen Fields on page 23.
Adding an Activity's Button Functions	<table><tr><td>**Button**</td><td>**Function**</td></tr><tr><td>**{Cancel}**</td><td>When adding a record. the **{Cancel}** clears out the new activity record</td></tr><tr><td>**{Reset}**</td><td>This is the same as **{Cancel}**</td></tr><tr><td>**{Save}**</td><td>Saves the activity record without submitting it. This may result in the display of errors which will need to be corrected by editing (next page)</td></tr><tr><td>**{Submit for Processing}**</td><td>This submits all unsubmitted data including any unsaved, added record See 3.3 Saving and Submitting Records. Data for any unsaved add will be lost.</td></tr></table>
Record Key Click	Editing of an activity is triggered by clicking the mouse over the activity (see the previous page). If this is triggered while an add activity is in progress, all details of the unsaved add will be lost
Get here from	Working on 4.2.4 Edit Referral: Part 1: Editing a Referral
Usually go to	By clicking **{Submit for Processing}** control switches to: • 4.2.7 Referral Accepted by PRIMHD((if no errors) • 4.2.8 Referral Rejected by PRIMHD (if an error is detected).

4.2.6   Edit Referral: Part 3: Editing or Deleting an Activity

The "Add New Activity" area in the 4.2.4 Edit Referral: Part 1: Editing a Referral will be replaced by this area when editing an activity.

Edit Activity

Activity ID	NGOWEBACT000002701
Start Date Time	10-10-2008 15 : 15 **
End Date Time	10-10-2008 23 : 45
Activity Type	(T01) Mental health crisis attendances ▼ **
Activity Setting	(CR) Community Residential ▼ **
Health Care Worker CPN	

** indicates mandatory fields

[Save] [Delete] [Cancel]

Function	Activity work can occur either:
	• as editing or deleting an activity using the above screen A record is selected for this editing by clicking on the appropriate activity – see the screen on the previous page
	• or as adding a record – see previous page. This is allowable when if no record has been selected for editing
Data Entry Notes	Mandatory fields are shown with an **.
	Rules defining what values to enter if the actual time is unknown are given in section 5.1 Screen Fields on page 23 .

Editing or Deleting an Activity 's Button Functions	**Button**	**Function**
	{Cancel}	{Cancel} clears out the new activity record and the screen appears ready to add a new activity
	{Delete}	After confirmation the record is flagged as 'to be deleted". The record will be deleted when the referral is next submitted. Once confirmed, this decision cannot be reversed. however one can load a new activity to match
	{Save}	Saves the record without submitting it. Errors may need to be corrected. The edited record is closed and the screen appears ready to add a new activity
	{Submit for Processing}	Submits all unsubmitted data. See 3.3 Saving and Submitting Records.

Record Key Click	Editing of an activity is triggered by clicking the mouse over the activity (see 4.2.4 Edit Referral: Part 1: Editing a Referral)
Get here from	Working on 4.2.4 Edit Referral: Part 1: Editing a Referral
Usually go to	By clicking **{Submit for Processing}** control switches to:
	• 4.2.7 Referral Accepted by PRIMHD((if no errors)
	• 4.2.8 Referral Rejected by PRIMHD (if an error is detected)

4.2.7   Referral Accepted by PRIMHD

```
Referrals   My Error Records

Referral Accepted by PRIMHD
✓  Referral NGOWEBREF000002266 has been successfully submitted and accepted by the PRIMHD system.
Referral Details
Referral ID                NGOWEBREF000002266
Organisation ID            G00059-E
Team Code                  7315
Deleted Flag
NHI Number                 MSZ3915
Sex                        M   Male
Date of Birth              30-11-1963
Referral From              PD   Paediatrics
Referral To
Referral End Code
Start Date Time            25-12-2008  18:29
End Date Time
Date Record Last Modified  12-05-2009  14:09
Activities
```

Activity ID	Activity Type	Activity Setting	Health Care Worker CPN	Start Date Time	End Date Time	Deletion
NGOWEBACT000002277	T08	CM		26-12-2008 18:00	27-12-2008 20:45	
NGOWEBACT000002323	T05	CM		05-04-2009 11:20		
NGOWEBACT000002541	T01	CM		10-01-2009 10:15	11-01-2009 15:16	

3 records found, displaying 3 records, from 1 to 3. Page 1 of 1

Function	This screen confirms the acceptance of an error free submitted referral
Data Entry Notes	This screen is not used for data entry
Button Functions	None
Record Key Click	None
Get here from	by submitting a referral without errors – see 4.2.4 Edit Referral: Part 1: Editing a Referral and its following two sections
Usually go to	The referrals tab or else log off

4.2.8   Referral Rejected by PRIMHD

Function	Shows the errors for a referral and its associated activities
Data Entry Notes	This screen is not used for data entry
Button Functions	Edit Referral - this enables editing by bringing up the main screen. **As the following screens do not display the reported errors, users may want to copy the errors before clicking this button**
Record Key Click	None
Get here from	• submitting a referral which has errors – see 4.2.4 Edit Referral: Part 1: Editing a Referral and its following two sections • clicking a record with an error on the 4.3 My Error Records: Referrals with Errors
Usually go to	Edit Referral – see above. If a user does not want to edit this referral, they should select a tab option or log off
Other Comment	1. To fit in with the full PRIMHD system, the ids seem complex. To help: • referral ids have a "REF" in the middle of the id • activity ids have an "ACT" in the middle of the id 2. A blue and white circle shows the data is unsubmitted or it has errors

4.3   My Error Records: Referrals with Errors

This screen appears after selecting the "My Error Records" tab.

Referrals	My Error Records		
My Error Records			

30 records found, displaying 10 records, from 1 to 10. Page 1 of 3 |◀ ◀ 1 2 3 ▶ ▶|

Last Modified	Referral Id	NHI Number
2009-03-06T14:04:54	REFMOHEW011000120	CDU8527
2009-03-06T14:15:53	REFMOHEW011000121	SST8572
2009-03-06T15:33:37	REFMOHEW011000087	GDN6208
2009-03-07T10:03:21	NGOWEBREF0000269	RDC1743
2009-03-09T10:09:48	REFMOHEW011000441	AZQ3616
2009-03-09T11:45:23	NGOWEBREF0000406	MZQ8294
2009-03-09T13:41:36	NGOWEBREF0000442	ABC1234
2009-03-09T15:16:31	NGOWEBREF0000443	DYJ7054
2009-03-09T15:50:17	NGOWEBREF0000281	CSL4446
2009-03-10T11:52:38	NGOWEBREF0000461	RFY3370

30 records found, displaying 10 records, from 1 to 10. Page 1 of 3 |◀ ◀ 1 2 3 ▶ ▶|

Function	This tab displays all the NGO referrals with submit errors. The error may be in an associated activity record.
Data Entry Notes	None.
Button Functions	None.
Record Key Click	Brings up the referral for viewing - 4.2.3 View Referral
Get here from	Clicking "MY Errors" Tab
Usually go to	See Record Key Click

4.4   Logging Out

Users should always try to log out.

The red log out icon is on the top right hand side of all screens. Click on this to log out.
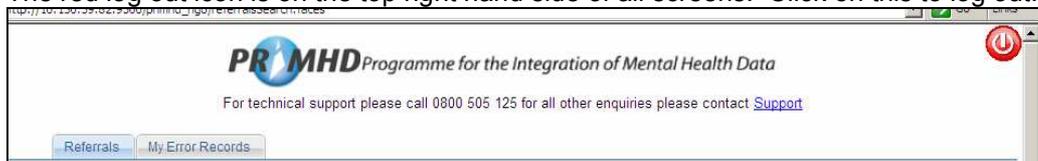
This screen confirms the log out.

The system will log users out when they have not used the system for an hour.

5   Terminology

This section on terminology contains:
- 5.1 Screen Fields
- 5.2 Glossary.

It is expected readers will generally refer to this section as they query a screen.

Where a term is referred to in another definition, then the term appears in:
- **bold** and *italics* if a screen field
- **bold** and **non-italics** if a glossary term.

5.1   Screen Fields

In this table
- names in brackets after the field name show the implied association
- unless specifically stated, the value can be modified at a later date. Of course the validation rules would still apply
- "**Required**" has options of "mandatory", "optional", "conditional" or "automatically generated"
- unless specifically stated, the editing rules are applied as the data is saved or submitted (different rules at different times)
- the section reference point to the screen on which the data is first seen or modified. It is only given for the error screens if that field is unique.

Screen Field	Meaning	Section
Activity End Date Time	**Definition:** the date and time the activity ended	4.2.3
	Required: conditional – required as record is initially saved for all non bed-night activities	
	Example value: 25-02-09 08:10	
	Editing rules: must be a valid date and time combination	
	Comments: 1. if the time is unknown, use 23:59	
Activity ID	**Definition:** the Activity ID is a unique identifier that identifies a single Activity Record for the **consumer**. This uniqueness applies to all **PRIMHD** activities – ie not just those submitted by this web system	4.2.3
	Required: automatically generated by the system as the record is saved. This unique identifier is generated by a combination of: • the prefix "NGOWEBACT" which is common for all this System's data entry • a unique number, implemented for each new activity entered for this system by any **NGO**	
	Example value: NGOWEBACT0000482	
	Editing rules: Not applicable	
	Comments: 1. as it is system generated it cannot be modified 2. **NGO's** may wish to add this ID to their own records 3. freeform entry on search screen is allowed	

Screen Field	Meaning		Section
Activity Setting	**Definition:** classification of the location where the **activity** took place.		4.2.3
	Required: mandatory		
	Example value: DM – home		
	Editing rules: must be a list box value		
	Comments:		
Activity Start Date Time	**Definition:** the date and time the **activity** started		4.2.3
	Required: mandatory		
	Example value: 25-02-09 11:03		
	Editing rules: must be a valid date and time		
	Comments: 1. if the time is unknown, enter 00:00		
Activity Type	**Definition:** the type of **activity** provided		4.2.3
	Required: mandatory		
	Example value: T42 – face-to-face consultation		
	Editing rules: must be a list box value		
	Comments:		
Date of Birth	**Definition:** the **consumer's** date of birth.		4.2.3
	Required: mandatory		
	Example value: 27-12-1946		
	Editing rules: must be a valid date and time combination		
	Comments: 1. as this value must match the **NHI**, this may force correction of the **NHI** record		
Date Record Last Modified	**Definition:** the date and time this referral record was added or last altered		4.3
	Required: automatically generated		
	Example value: 25-02-09 08:04		
	Editing rules: not applicable		
	Comments: 1. if the record has not been updated, this is the creation time		
End Date Time	See *Referral End Date Time* or *Activity End Date Time* as appropriate.		

Screen Field	Meaning	Section
Healthcare Worker CPN	**Definition:** the identity of the responsible Healthcare worker associated with the activity. The healthcare worker Common Person Number (CPN) is a unique lifetime identifier for all New Zealand, which takes precedence over all other identifiers, for workers providing health care services. A healthcare worker will be identified with the use of a **HPI** Common Person Number (HPI CPN). (Refer HISO HPI Data Set 10005 and HISO HPI Code Set 10006)	4.2.3
	Required: an optional entry which should be used if the correct value is known. Some **NGOs** may elect to make it compulsory for their organisation's use	
	Example value: 94TYGR	
	Editing rules: the number must be in the format NNAAAA, 2 digits followed by 4 alphabetic characters, It must also have a matching HPI entry	
	Comments: 1. as more Health Care workers have their CPN allocated, more activities will have this value recorded	
NHI Number	**Definition:** the National Health identity (**NHI**) number is used to identify the **recipient** of the **referral** and its **activities.** PRIMHD uses the term **consumer** for **recipient**.	4.2.1 4.2.3
	Required: mandatory	
	Example value: DFG4086	
	Editing rules: 1. must be 3 characters followed by four digits 2. when submitted to PRIMHD: • the **NHI** number must be registered in the NHI system • the sex and date of birth entered for this **consumer** must match the **NHI** record	
	Comments: 1. the user must enter the correct value 2. these NHI Numbers can be obtained from 0800 855 151 3. users should check and if necessary, correct the **NHI** held sex and date of birth values	

Screen Field	Meaning	Section
Organisation ID	**Definition:** the Organisation identifier from the Health Practitioner Index, the **HPI** Organisation ID, will be used to define the organisation providing service. This is a unique lifetime identifier for an organisation assigned by the HPI system which takes precedence over all other identifiers, for organisations providing health care services. An organisation is the entity that provides services of interest to, or is involved in, the business of the health care service provision. There may be a hierarchical (parent-child) relationship between organisations **Required:** automatically generated by the system configured for the NGO **Example value**: G00059-E **Editing rules**: not applicable **Comment**s: 1. this is set up as the NGO's system is configured by **DMS**	4.2.1
Password	**Definition:** user unique and password used for checking authority to access the system **Required:** mandatory **Example value**: -- **Editing rules**: -- **Comment**s: 1. the full rules re security of use supplied as the user is set up apply 2. see the training manual re how to handle a missing password	4.1
Referral End Code	**Definition:** the reason the referral ended **Required:** conditional – must be supplied whenever the *Referral To* and the *Referral End Date* are supplied **Example value**: DR – Ended Routinely **Editing rules**: must be a list box value **Comment**s:	4.2.3
Referral End Date Time	**Definition:** the data (and time) a **referral** ends. **Required:** conditional – must be supplied whenever the *Referral To* and the *Referral End Code* are supplied **Example value**: 25-02-09 08:23 **Editing rules**: Must be a valid date and time combination **Comment**s: 1. if the time is unknown, use 23:59	4.2.3

Screen Field	Meaning	Section
Referral From	**Definition:** the **referral** source	4.2.3
	Required: mandatory	
	Example value: GP	
	Editing rules: must be a list box value	
	Comments:	
Referral ID	**Definition:** the Referral ID is a unique identifier that identifies a **consumer's referral** record. This uniqueness applies to all **PRIMHD** referrals – ie not just those submitted by this web system	4.2.1 4.2.3
	Required: automatically generated by the system as the record is saved. This unique identifier is generated by a combination of: • the prefix "NGOWEBREF" which is common for all this system's data entry • a unique number, implemented for each new activity entered for this system by any **NGO**	
	Example value: NGOWEBREF0000145	
	Editing rules: not applicable	
	Comments: 1. this cannot be modified. 2. freeform entry on search screen is allowed 3. it may be helpful for the **NGO** to store this key with their records	
Referral Start Date Time	**Definition:** the date (and time) the **referral** started	4.2.1 4.2.3
	Required: mandatory	
	Example value: 25-02-09 11:01	
	Editing rules: must be a valid date and time	
	Comments: 1. recorded as date and time 2. when used as a search parameter, time is not entered 3. if the time is unknown, record 00:00	
Referral To	**Definition:** records where the **consumer** is referred to.	4.2.3
	Required: conditional – must be supplied whenever the ***Referral End Code*** and the ***Referral End Date*** are supplied	
	Example value: NR – No further referral	
	Editing rules: must be a list box value	
	Comments:	

Screen Field	Meaning	Section
Sex	**Definition:** the **consumer's** sex	4.2.3
	Required: mandatory	
	Example value: F – Female	
	Editing rules: 1. must be a list box value 2. must match the **NHI** value	
	Comments: 1. if the **NHI** entry is wrong, then this must be corrected	
Start Date Time	See *Referral Start Date Time* or *Activity Start Date Time* as appropriate.	
Team Code	**Definition:** the code for the **NGO's** team that the user is entering the referral and activity data	4.2.1 4.2.3
	Required: mandatory	
	Example value: 7316	
	Editing rules: the team code must be one of the codes allocated to the organisation	
	Comments: 1. team records including this number are managed by Data Management Services National Collections Team – see 1.4 Help	
To Be Deleted	**Definition:** A "yes" in this field shows this activity will be deleted when the referral is next submitted. The activity record then disappears	4.2.4
	Required: set when an activity is being edited and **{Delete}** is clicked	
	Example value: "Yes" appears if record is to be deleted	
	Editing rules: When the delete key is pressed, confirmation that the delete is required is requested.	
	Comments: 1. A confirmed delete request cannot be reversed. However a 'reversal' can be achieved by entering the details again as a new activity.	
User ID	**Definition:** user's identification code entered as they log on.	4.1
	Required: mandatory	
	Example value: MALTILDA	
	Editing rules: checked with the password by the security system	
	Comments: 1. this user ID must be loaded along with the correct password as the user logs into the system 2. the User ID is supplied by Data Management Services National Collections Team – see 1.4 Help. Contact them for help with getting a new user established 3. the organisation must also request the removal of the access authority for all users that leave. It must be loaded along with the correct password as they log into the system	

5.2 Glossary

Term	Meaning
Activity	PRIMHD describes all service provision to a **consumer** as an 'Activity'.
	Activities include services delivered to a **consumer** once an interaction happens between the **consumer** and the service provider. A service may take a variety of forms such as, but not limited to: treatment and/or support provided by a mental health and addiction inpatient facility, or by a specialised mental health outpatient clinic either on healthcare sites or within the community, or by a residential facility. For example the service may be provided on a one-to-one basis, as part of a group session via telephone or audio-visual links. An activity may also include support services, such as assistance with housing or employment.
	Activities can be provided by a variety of different teams, including teams that would normally operate in the community or outpatient setting, providing services to consumers within an inpatient or residential setting.
	Activity information collected relates to: 1. the type of service provided; 2. the mental health and addiction team and healthcare worker that provided the service; 3. the service setting; 4. the start and end date and time of the activity
	Activities set in outpatient clinics or within the community are generally measured in terms of contacts with the consumer.
	In inpatient and residential settings, duration is generally measured in "bed nights". A "bed night" is a bed occupied at midnight. If a bed is held for the **recipient**, but unoccupied, it is to be given an *activity type* of "on leave".
	As the **user** saves a record, this system automatically allocates an *Activity ID*. Each activity is associated with its relevant **referral** by use of the *Referral ID*
	This definition is an NGO orientated overview of an activity. For a full definition see sections 2.1 to 2.2.2 of the HISO Integrated Mental Health Data Process Standard" – see Associated Documents.
Collection	A national set of data, particular to a specific part of the heath sector eg Pharms holds information on all subsidised prescriptions. These collections are available for reporting, management and operational purposes. Users include DHBs, researchers and Ministry staff
Consumer	This is the PRIMHD term for the person accessing mental health services. See **NHI**
DMS	Data Management Services – the Ministry of Health area charged with the ongoing support and operation of various health systems including PRIMHD
HPI	The Health Practitioner Index (HPI) is the central source of core information about all registered practitioners. The HPI system helps identify and provide information on practitioners, health workers, organisations and facilities
Ministry	Ministry of Health
NGO	Non-governmental organisation. These organisations hold contracts with DHB's or the Ministry of Health to provide mental health services.
NHI	The National Health Index which has an entry for each **consumer**. The NHI generally refers to a consumer as a **recipient**. Each **consumer** has a unique code called the NHI Number. "
PRIMHD	Programme for the Integration of Mental Health Data. PRIMHD is pronounced as "primed"

Term	Meaning
Recipient	The recipient of Ministry funded health care. **PRIMHD** uses **consumer** instead of **recipient**. The recipient is also known as a Health Care User (HCU), or patient. Each recipient has a unique code called "HCU", "HCU ID", "**NHI**" or NHI code
Referral	The Referral, also known as the Referral-Discharge, can be a: 1. request for management of a problem or provision of a service, e.g. a request for an investigation, intervention or treatment; 2. notification of a problem with the hope, expectation or imposition of its management, e.g. an exit summary in a setting, which imposes care/support responsibility on the consumer. The common factor in all referrals is a communication whose intent is the transfer of care/support, in part or in whole request to a mental health and addiction service **team**. The request can be made by: 1. the **consumer** or their family, whānau, or other significant person, or 2. from one **team** to another. In this case the requesting **team** may or may not transfer responsibility 3. via another agency. All these requests shall be recorded as a new referral. To ensure information on un-met demand is not lost, declined request must also be recorded. Within a referral, a particular team will be allocated responsibility for the **consumer**. This team will be responsible for ensuring that a comprehensive assessment has been completed or assessment information is received and that all **activities** associated with the team's referral are recorded. Where two or more teams have a joint treatment with a **consumer**, then each **team** would have their own referral to record separate **activities**. A referral must be closed when the **team** is no longer providing services to the **consumer**. The **PRIMHD** Referral Discharge ID (***Referral ID)*** is a unique identifier that identifies a Referral Discharge episode for a **consumer** and is the primary key that links the relevant **activities**. As the **user** saves a record, this system automatically allocates a ***Referral ID.*** Each activity is associated with the one referral by use of the ***Referral ID.*** It may be useful for the NGOs to add these IDs to their own records. This is an **NGO** orientated overview of a referral. For a full definition see sections 2.1 to 2.2.2 of the HISO Integrated Mental Health Data Process Standard" – see Associated Documents.
Team	An **NGO** group that conducts a treatment programme for a **consumer**
User	Within this manual, the user is the person responsible for entering the **NGO's** data.

6   System and Technical Items

Prerequisites for this document are for the reader to
- have a their user log on details set-up
- completed training

6.1   Prerequisites for System Use

In order for an individual to use this system:

1. the **NGO** and all its teams must be registered in **PRIMHD**.
   This requires the **NGO** to work with the Ministry's **DMS PRIMHD** support team to record **NGO** and team details, establish connections to the **PRIMHD** system, etc.

   This process normally takes one month. It can be initiated by the **NGO** seeking assistance – see 1.4 Help

2. the **NGO's** site must have PCs that:
   - have a broadband intranet connection
   - are connected to the **PRIMHD** system (see above)
   - run Microsoft's XP SP2 operating system or later
   - Windows Explorer Version 6.0 or later browser.
3. the user must:
   - belong to an authorised team – see point 1 above
   - have an individual user ID and password – see the next sub-section
   - have completed training

The maintenance of the team records is done by the Ministry's Data Management Services National Collections Team. This team must be requested to revoke a user's authorisation when they leave their organisation or cease data entry and review duties.

6.2   Changing Personnel and Organisation Details

It is necessary to complete a Health Secure Change of Details Form if any personal or organisation details change from those supplied on the original application forms.

Changes to details fall into the following two categories:
- Personnel changes e.g. change of name
- Organisation changes e.g. change of address or change of authorised signatories.
To get forms etc – see 1.4 Help.

6.3   Getting Reports

Although this system is for data entry, you can get one and /or regular reports on your data. Please email Data-Enquiries/MOH to initiate a request.

6.4   Screen Setup

If the user requires help with their screen set-up or browser, they must work with the suppliers of their PC and software. However these screen shots may help.

6.4.1   Screen Resolution

On a PC from the start menu – settings/ control panel /display:
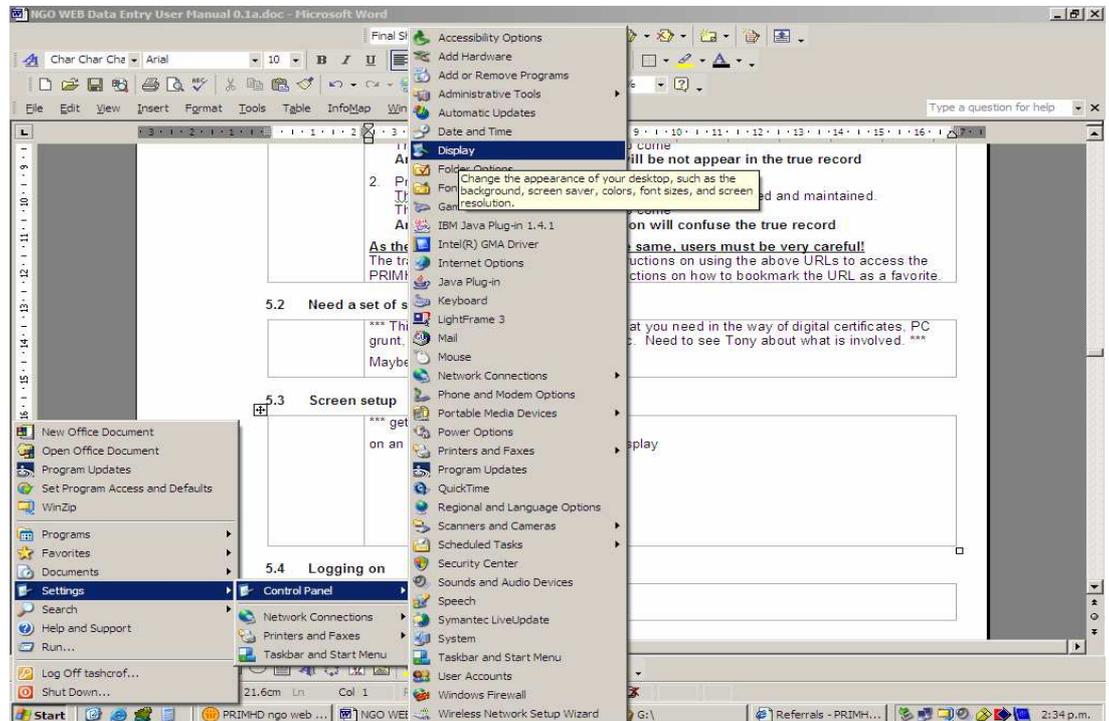
Then select Settings
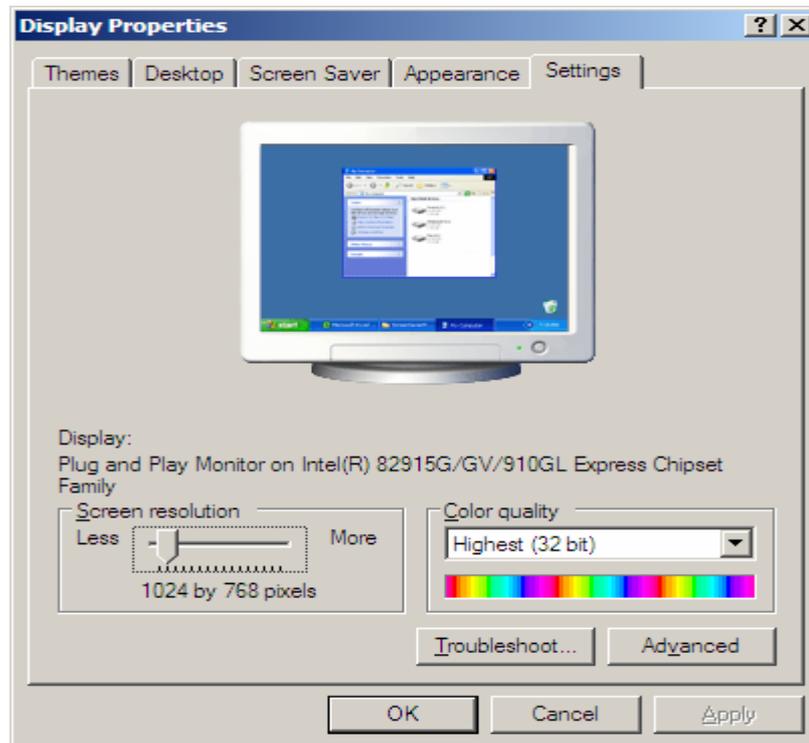
1024 by 768 or bigger numbers are desirable.

6.4.2   Font Size

Use windows explorer / view / text size to choose a medium or smaller font:

6.5   Timeout

The system has a "Timeout" function, which logs a user out after an hour without activity. Any record currently being edited / added will be discarded.

MINISTRY OF HEALTH
MANATŪ HAUORA

NGO Web Data Entry System User Manual
Background Information   **PMO0228 Program for the Integration of Mental Health Data**
Solutions Delivery Group, Information Directorate

7   Background Information

This section provides further background information for those who would like to know more.

7.1   Why is the Consumer's Sex and Date of Birth Captured?

Given that is absolutely essential that the correct **NHI Number** is used, this system requires the **consumer's** sex and date of birth is loaded to help verify this number.

7.2   Authority for Collection of Health Information

The Ministry of Health's mandate to collect health information is set out in legislation, in particular, in section 22 of the Health Act 1956, section 139A of the Hospitals Act 1957, the Cancer Registry Act 1993, and the Health Practitioners Competence Assurance Act, 2003.

The collection, storage and use of health information is also governed by the Privacy Act 1993, the Health Information Privacy Code 1994, and the Accident Insurance Act 1998.

7.3   Collection Methods

All hospitals and NGOs that receive government mental health and alcohol and other drug funding are contractually required to send timely, accurate and complete data to PRIMHD, including:

- publicly funded hospitals
- specialist inpatient mental health facilities
- community mental health services
- alcohol and other drug services
- residential and supported accommodation services.

Note: Since some psychogeriatric services are funded by the Disability Services Directorate rather than the Mental Health Directorate, not all DHBs report psychogeriatric information.

It is the responsibility of healthcare providers to ensure timely collection of data at each site. Data sent to Information Directorate is expected to reflect all activities occurring for all patients during the previous month's start and end dates.

7.4   The Purpose of PRIMHD

The overarching purpose of the PRIMHD process is to define the collection of minimally-required core data elements for an integrated mental health and addiction services national collection. The PRIMHD project's purpose also is to provide:

(a) secure information access and reporting through consistent use of benchmarking, standards and key performance indicators, to underpin decision support and policy development.

(b) data about the value of mental health services to support workforce development activities, including cultural relevance; to enhance the mental health knowledge base and to improve health outcomes for consumers.

7.5   PRIMHD Objectives

The primary objective of PRIMHD is to provide integrated Mental Health interventions, service activities and outcomes information for decision support and monitoring of strategy and policy formation for Mental Health in New Zealand. A by-product of this will be local benefits around benchmarking and ability to use the local data for planning and service improvement.

The project objectives are to:

*   Merge MHINC and MH-SMART data items into a single new integrated national collection.
*   Fill the gaps identified in the current Mental Health data collections.
*   Create an episodic view of the Mental Health data.
*   Work with the sector to create a new national standard of well defined and accepted set of data definitions, common code sets, validation rules and business rules, including privacy, regarding information capture and use.
*   Create the minimum data information standard that shows Mental Health services, interventions and outcomes activities from both NGO and DHB perspectives.

Background Information

NGO Web Data Entry System User Manual
PMO0228 Program for the Integration of Mental Health Data
Solutions Delivery Group, Information Directorate

7.6   PRIMHD Generic Information Lifecycle
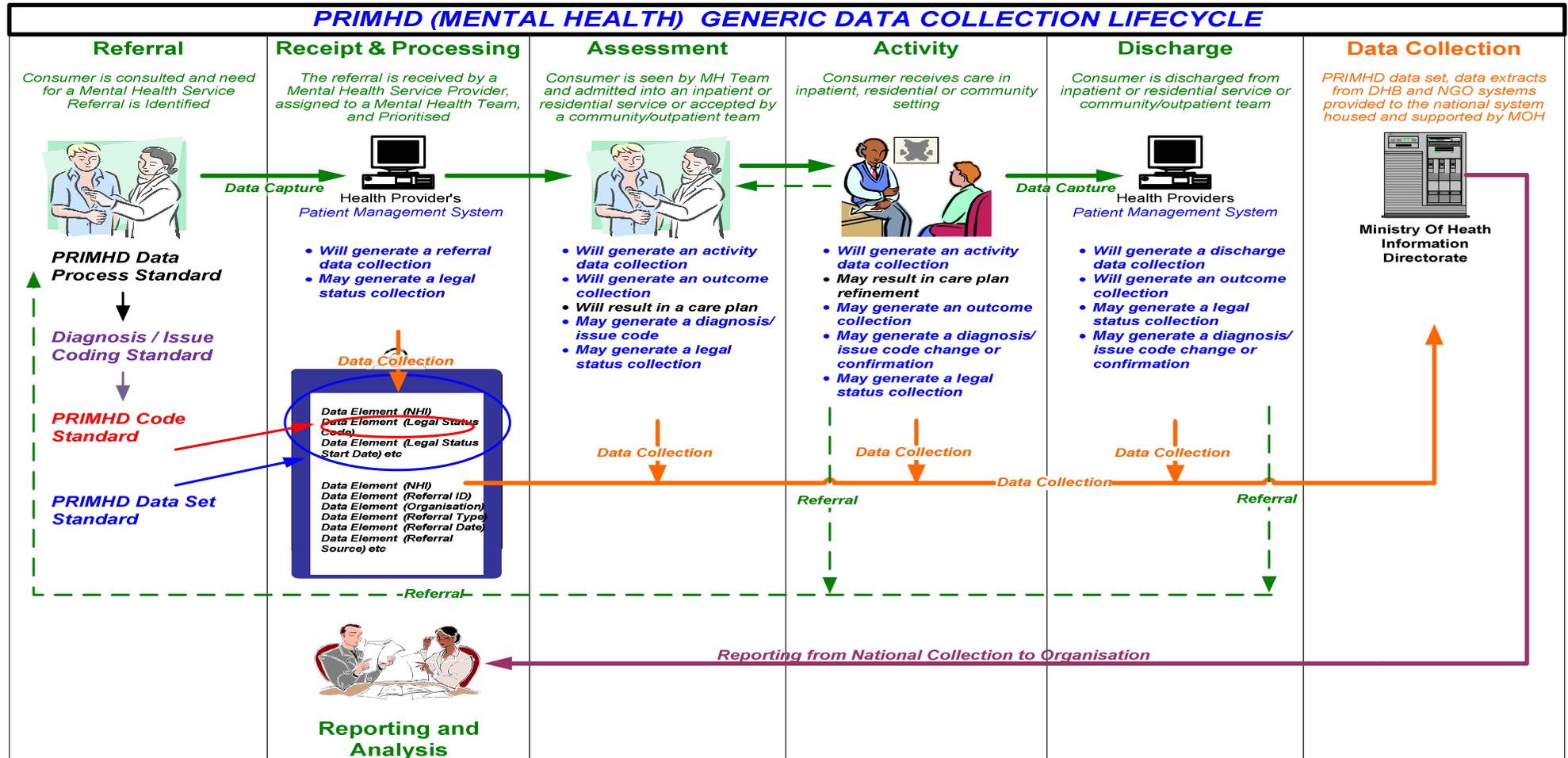
This diagram shows the overall PRIMHD data flows. The NGO system deals with a subset of this information.   It has been taken from the HISO Integrated Mental Health Data Process Standard" – see Associated Documents.