



Programme for the Integration of Mental Health Data

PMO0228

**NGO WEB DATA ENTRY SYSTEM
TRAINING MANUAL AND USER GUIDE**

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Information Directorate

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Document Control

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Associated Documents

Document Name	Web Location
PRIMHD File Specification v2.0	http://www.moh.govt.nz/moh.nsf/indexmh/primhd-ngos-key
HISO 10023.1 Integrated Mental Health Data Process Standard	http://www.moh.govt.nz/moh.nsf/indexmh/primhd-ngos-key
HISO 10023.2 PRIMHD Data Set v2.0	http://www.moh.govt.nz/moh.nsf/indexmh/primhd-ngos-key
HISO 10023.3 PRIMHD Code Set v2.0	http://www.moh.govt.nz/moh.nsf/indexmh/primhd-ngos-key
PRIMHD NGO Web Data Entry Training Manual	http://www.moh.govt.nz/moh.nsf/indexmh/primhd-ngos-key

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1. Document Overview

1.1 Introduction

This document has been developed by combining the “Training Manual for NGOs Using the Web Data Entry System” and the “NGO Web Data Entry User Manual” to provide a single source document to train and support the PRIMHD NGO Web Data Entry System.

This introduction covers:

- The purpose of this training manual and referential user guide; including a content summary
 - Who uses the document and when
 - Assumptions for use.
 - Updates and supporting material.
 - Getting help.
-

1.2 Purpose and Content Summary

The purpose of this document is to provide a structured Training Manual and Referential User Guide for the use of the PRIMHD NGO Data Entry System. It trains a user how to operate the PRIMHD NGO Data Entry System and submit their Mental Health and Addiction Service data to Ministry of Health’s National Collection, PRIMHD. Additionally it provides referential information for ongoing support of the Record Types and Data Elements and an understanding of their guide for use in the PRIMHD NGO Data Entry System.

The Training Manual (Course) sections describe how to:

- Get started and Logging On to PRIMHD’s NGO Data Entry System
- Search and select PRIMHD Referral and Activity Records
- Create New, Read, Update and/or Delete PRIMHD Referral and Activity Records
- Save and Submit Referral and Activity Records
- Manage, Correct and Re-Submit Error Records
- Finish your session, Timeouts and Logging Off from PRIMHD’s NGO Data Entry System

The Referential User Guide sections provide the following supporting and referential information about the PRIMHD NGO Data Entry System:

- Detailed Screens
 - Terminology
 - Miscellaneous System and Technical Information.
-

1.3 Who Uses this Document and When

This Training Manual and Referential User Guide is to be used by NGOs who are using the PRIMHD Web Data Entry System to report their Mental Health and Addiction services to the Ministry Health’s national system PRIMHD.

This document is to be used as part of a training programme for NGO users who are using the PRIMHD Web Data Entry System and for future reference during the ongoing use of the system.

1.4 Assumptions for Use

When using this Training Manual and Referential User Guide it assumes the user:

- Understands that the PRIMHD NGO Data Entry System only provides data elements and codes for the NGO Referral and Activity Service Record requirements according to the HISO PRIMHD data set and code set standards that must be used in this system. (Note: The PRIMHD NGO Data Entry System **can not** be used to map to alternate code sets and systems that maybe in use by the NGO provider).
 - Has their own relevant browser training and supporting reference material/documentation.
 - Has complied with all the Prerequisites for System Use as specified in Section 2.
 - Has a copy of the PRIMHD File Specification for reference to the self-explanatory error messages that are not repeated in this document. Please refer to the PRIMHD File Specification – see Document Control – Associated Documents..
 - Understands this Training Manual and Referential User Guide will be distributed with other HISO supplementary documentation (eg, PRIMHD 10023.2 Data Set and 10023.3 Code Set).
 - Has received their User ID and Password for use of the PRIMHD NGO Data Entry System.
-

1.5 Updates and Supporting Documentation

Future updates to this Training Manual and User Guide will be detailed in an Appendix.

Supporting documentation and any updates are available from the Ministry Health's PRIMHD website – see <http://www.moh.govt.nz/moh.nsf/indexmh/primhd-ngos-key>

1.6 Getting Help

Help and system support for the PRIMHD Web Data Entry System only can be obtained from the Ministry of Health Information Directorate's Help Desk.

For help with adding a new user or team, understanding a system error, a data problem etc, please email primhduserinterface@moh.govt.nz. Clicking on the [support](#) link at the top of the NGO Data Entry System screen automatically opens an email to this address.

For help with PRIMHD system technical problems, (eg. system availability or health network connectivity problems), please telephone **0800 505 125** and press **4** for PRIMHD enquiries.

Note: The Ministry of Health does not provide support help for the following.

Local PC or technical problems (eg. PC start-up, Printing difficulties, Internet service problems, local applications software or operating system software problems). If you have any local support needs please contact your usual PC support agent, Technical programming help desk, or Internet service provider for assistance.

2. System Overview

2.1 Introduction

Chapter 2 of this Training Manual and Referential User Guide provides a System Overview of the NGO Web Data Entry System that explains:

- the purpose of the NGO Web Data Entry System
 - the system's availability
 - the pre-requisites for using the system
 - the user's responsibilities.
-

2.2 Purpose

The purpose of the PRIMHD NGO Web Data Entry System is to enable small NGOs to report their Mental Health and Addiction referral and service activities information to PRIMHD, the mental health national collection, via a web based solution.

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.

2.4 Pre-Requisites 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. At the end of this process the **NGO** will be provided with User ID's and passwords for their users to access the system. It can be initiated by the **NGO** seeking assistance – see **Section 1.6 Getting Help**
 2. The **NGO's** site must have PCs that:
 - have a broadband internet connection
 - are able to connect to the **PRIMHD** system
 - run Microsoft's XP SP2 operating system or later
 - have Internet Explorer Version 7.0 or later browser.
 3. The **User** must:
 - belong to an authorised team – see point 1 above
 - have an individual user ID and Password before attempting to Log On.
 - have completed training with designated trainers.
-

2.5

User Responsibilities

PRIMHD requires all government funded organizations to meet their reporting responsibilities. The NGO user responsibilities for data entry 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 may detect errors and place them in My Error Records for the user to correct, the user is still required to check the accuracy of their data. (For example: A User could select Code A for Data-field 1 and Code T for Data-field 2. Both Codes are valid but together in the same Activity Record they are not a valid combination. User's need to be mindful of this level of data accuracy requirement in PRIMHD).

3. Complete the training exercises in this document to the use of this system

4. Be able to use their web browser

The user must be competent with their own browser.

5. When Users cease to use the system

The maintenance of User IDs for the NGO Entry System is done by the Ministry's Data Management Services (DMS) National Collections Team. You must contact the DMS National Collections Team to update User ID Records to revoke a user's authorisation when they leave their organisation or cease data entry work.

6. When Teams change

The maintenance of the Mental Health & Addiction Team Records is done by the Ministry's Data Management Services (DMS) National Collections Team. You must contact the DMS National Collections Team to update the Teams Records when there is a change of team duties, one team closes and another opens, or when contracted services change.

7. NGOs with Residential Teams

NGO's with residential beds will need to log on each month and submit each referral for processing, even if there has been no change – i.e. the client is still using the residential bed. This will ensure that we are able to accurately count these residential bed night activity records. This will be covered as part of training for the NGOs concerned.

3. Training

3.1 Introduction

Chapter 3 of this Training Manual and Referential User Guide provides the Training Course Exercises used for teaching a User of the NGO Web Data Entry System how to operate the system correctly and successfully submit their Mental Health and Addictions services information (Referral & activity Records) to PRIMHD.

- Each section within this Chapter contains a different training exercise that needs to be completed prior to using the NGO Web Data Entry System.

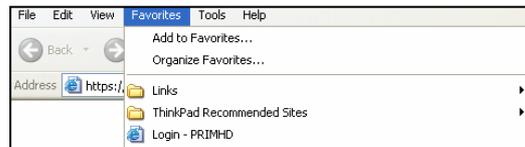
3.2 Accessing the PRIMHD Web Site

To access the PRIMHD website easily, it should be listed as a favourite or bookmark which can be accessed from the toolbar.

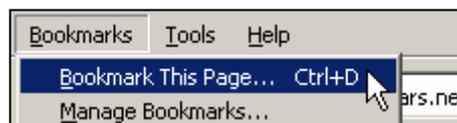
To set this up, type the URL in the address bar at the top of the browser and press the **Enter** key on the keyboard. This will take you to the PRIMHD site (the log in page).

In some browsers you may be presented with a screen stating “there is a problem with the website’s security certificate”. If this happens, select “continue to this website”.

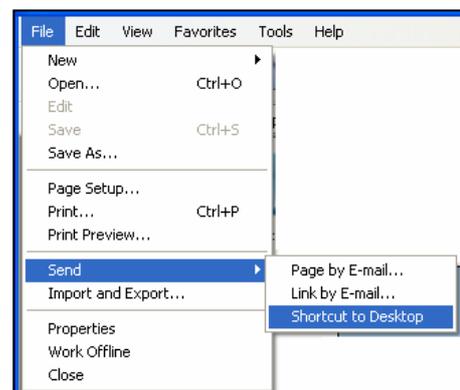
Internet Explorer users: Click on Favourites at the top of the screen and choose **Add to Favourites**.



Firefox users: Click on Bookmarks at the top of the screen and choose **Bookmark This Page**



Alternatively (or in addition to the above), set up a shortcut icon on your desktop. To do this, access the URL website as described above. Click on **File** from the menu bar at the top and then select **Send Shortcut to Desktop**



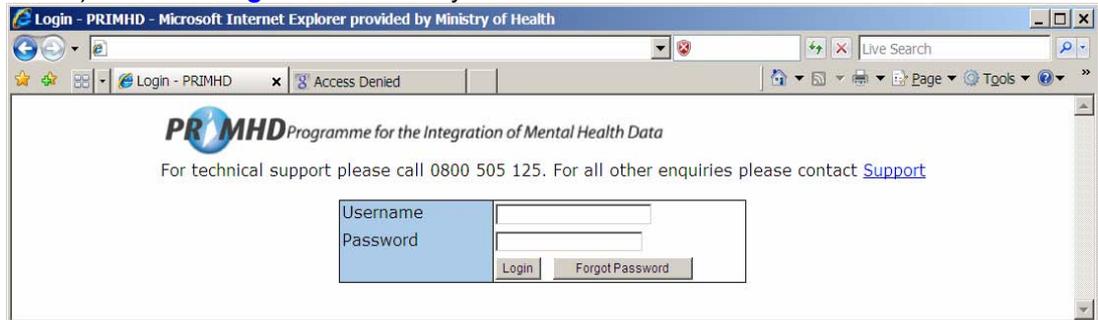
The shortcut icon will then appear on your desktop looking like this:



You can then use this shortcut to easily access the site in the future.

3.3 Log In Instructions

To log in to the PRIMHD system, click in the **Username** field and type your User ID (that will have been supplied to you by the Ministry's Data Management Services (DMS) National Collections Team) and your **Password** (which appears as a series of dots rather than letters). Click on **Login** to enter the system.



The first time the system is accessed, a screen will appear prompting you to change your password.

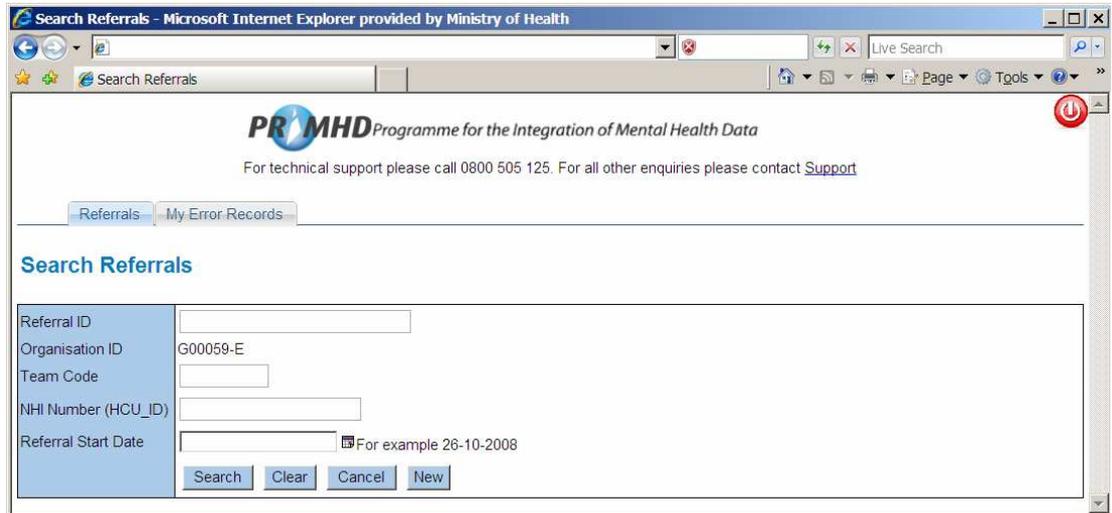


Enter your old password and your new password and then reconfirm your new password. The new password needs to be at least 6 characters long and is case-sensitive. Click the **Change Password** button. You will then be taken to the Search Referral screen.

NOTE: The **Forgot Password** feature is not currently accessible in this product release. See section 1.6 for details of who to contact if you need help with your password.

3.4 Referral Records

Once in the system, your starting point will be the Referrals section (notice the tab at the top of the screen is shaded blue). This form will appear, ready for you to input new data or search for existing data. You can come back to this screen at any time by clicking on the Referrals tab.



This screen enables you to complete all of the fields for a new referral (see pages 13-15) or just a few fields if you wish to search for an existing referral (see page 16).

For the **Referral Start Date** you can enter the day, month and year directly or click on the

 icon. A calendar showing the current month and year will appear.



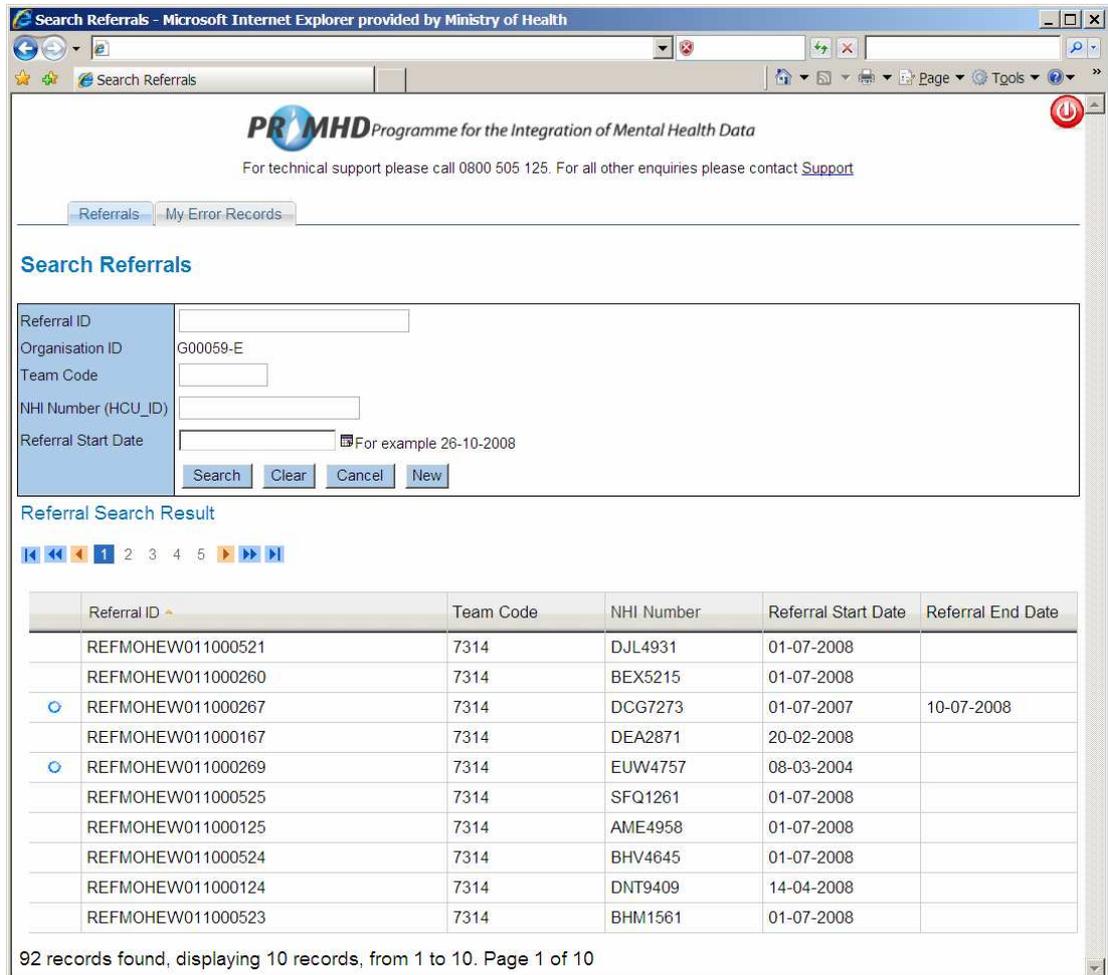
Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Note that there are several places on different screens where this calendar can be accessed from the  icon.

You can use the drop down arrows to change the month or year. To select a date click on it, it will then insert the date into the Referral Start Date field and close the calendar.

3.5 Search Existing Referral Records

To search for any Referrals within your organisation, click on the **Search** button and this screen will display with all Referrals listed. If you want to search by any of the fields on the form in addition to Organisation ID, enter the appropriate details before you click **Search**



Note: The blue/white round icon on the left of the Referral ID means that this particular Referral has not yet been submitted for processing **or** has errors that need to be corrected.

You can click on the column headings to display the activity records in different order. The small arrow next to referral ID in the screenshot above indicates the records are ordered by referral ID.

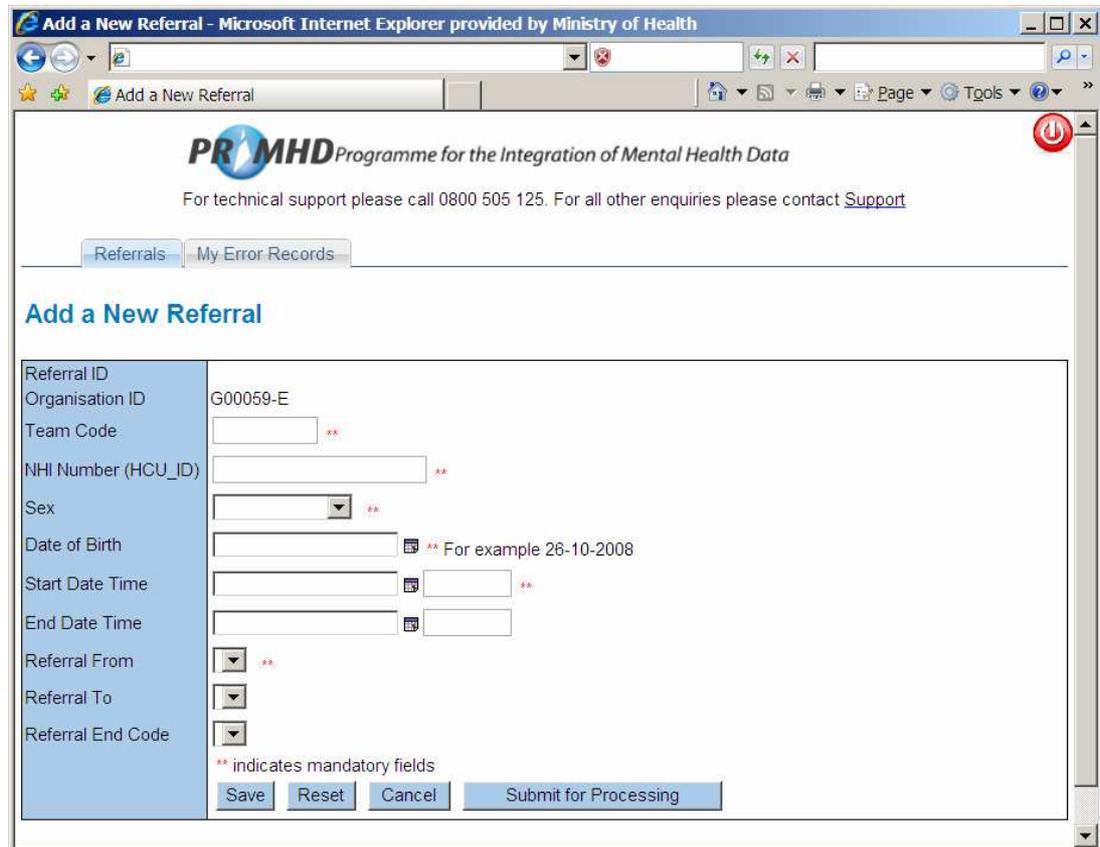
From this screen you can modify the existing Referrals by following the instructions in Section 3.6 on page 13 or Adding an activity by following the instructions in Section 3.10 on page 18.

The **Clear** button will clear any data that you have entered in any field on this form.

The **Cancel** button will remove your search results display.

3.6 Adding New Referral Records

To add a new Referral, click on the **New** button and complete the required data fields. Any field that has ****** is mandatory. Some fields have drop down lists for you to make your selection from. You must enter a start time in the 24 hour clock format including minutes.



Add a New Referral - Microsoft Internet Explorer provided by Ministry of Health

PRIMHD Programme for the Integration of Mental Health Data
For technical support please call 0800 505 125. For all other enquiries please contact [Support](#)

Referrals My Error Records

Add a New Referral

Referral ID	
Organisation ID	G00059-E
Team Code	<input type="text"/> **
NHI Number (HCU_ID)	<input type="text"/> **
Sex	<input type="text"/> **
Date of Birth	<input type="text"/> ** For example 26-10-2008
Start Date Time	<input type="text"/> <input type="text"/> **
End Date Time	<input type="text"/> <input type="text"/>
Referral From	<input type="text"/> **
Referral To	<input type="text"/>
Referral End Code	<input type="text"/>

** indicates mandatory fields

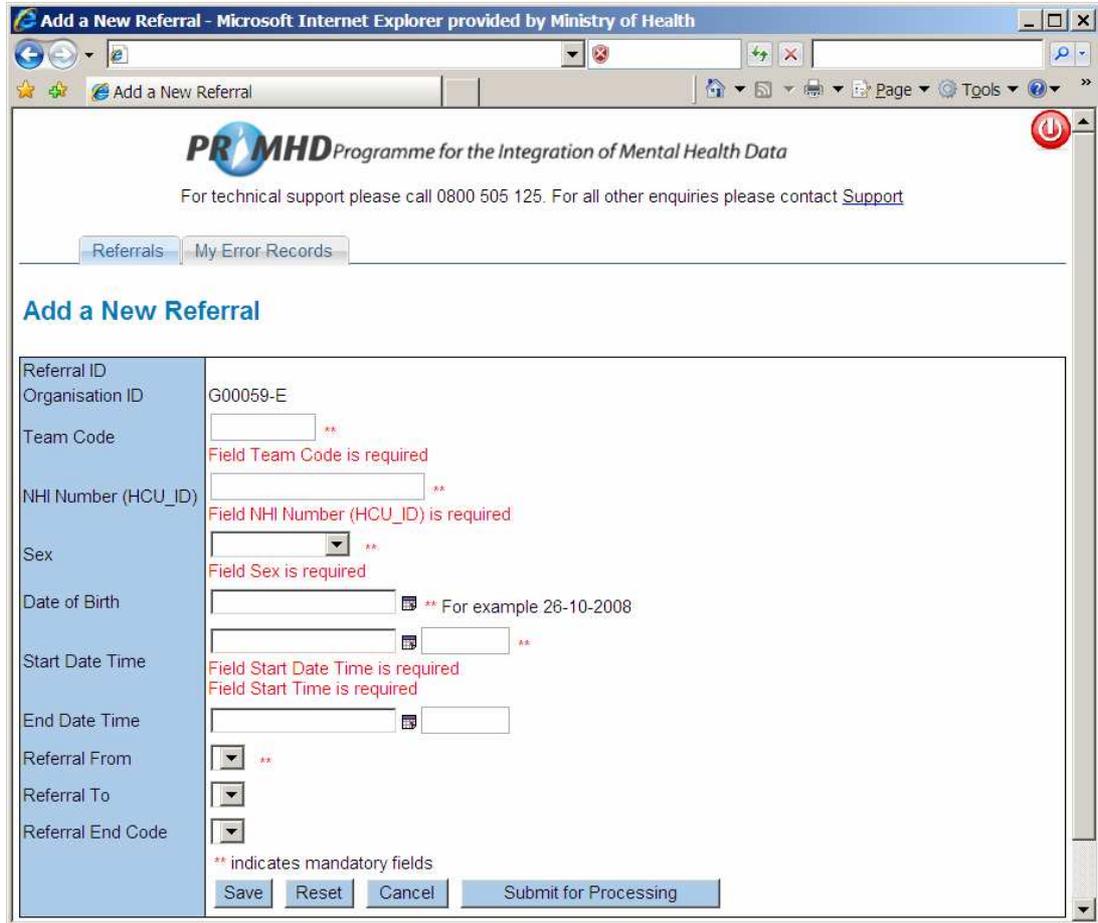
Save Reset Cancel Submit for Processing

Enter all appropriate details and click the **Save** button.

Continued on next page...

Adding New Referral Records, Continued

If you miss out any mandatory fields (those marked with red stars **) or use incorrect formatting, error messages will show up with a red explanatory note eg:



Add a New Referral - Microsoft Internet Explorer provided by Ministry of Health

PRIMHD Programme for the Integration of Mental Health Data

For technical support please call 0800 505 125. For all other enquiries please contact [Support](#)

Referrals My Error Records

Add a New Referral

Referral ID	
Organisation ID	G00059-E
Team Code	<input type="text"/> ** Field Team Code is required
NHI Number (HCU_ID)	<input type="text"/> ** Field NHI Number (HCU_ID) is required
Sex	<input type="text"/> ** Field Sex is required
Date of Birth	<input type="text"/> ** For example 28-10-2008
Start Date Time	<input type="text"/> ** Field Start Date Time is required Field Start Time is required
End Date Time	<input type="text"/>
Referral From	<input type="text"/> **
Referral To	<input type="text"/>
Referral End Code	<input type="text"/>

** indicates mandatory fields

Save Reset Cancel Submit for Processing

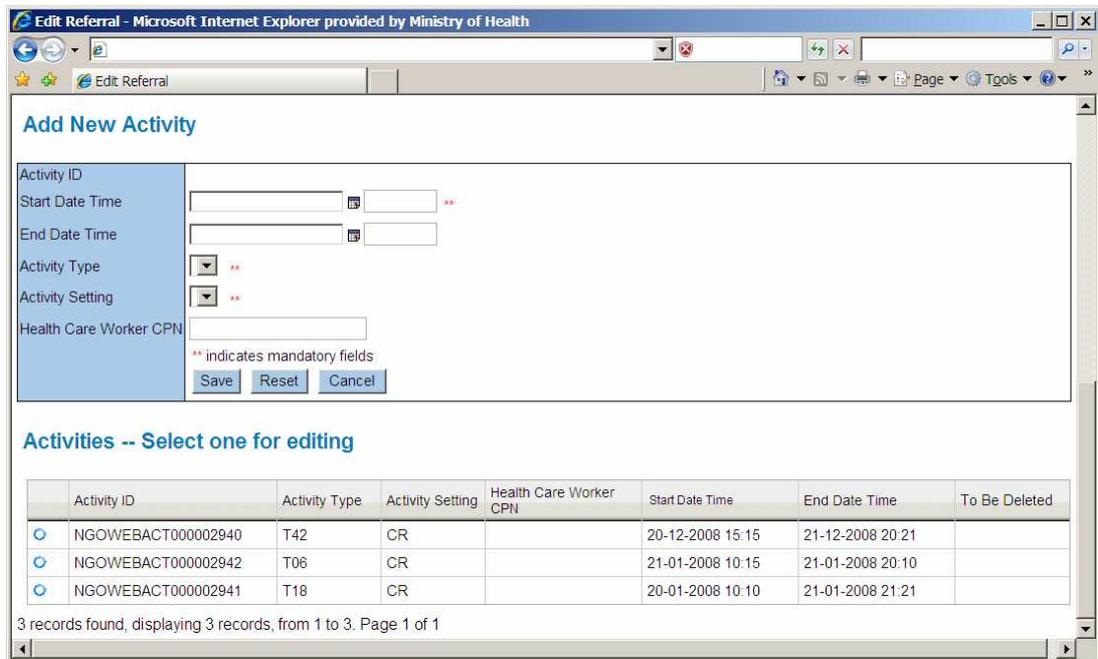
Continued on next page...

Adding New Referral Records, Continued

When you have entered your Referral details and you wish to add activities, click the **Save** button.

The new Activity form will appear below the referral form (see Section 3.10 Page 18 for steps on how to complete this form).

If you only wish to submit the Referral details, then click the **Submit for Processing** button.



The screenshot shows a web browser window titled 'Edit Referral - Microsoft Internet Explorer provided by Ministry of Health'. The main content area is titled 'Add New Activity' and contains a form with the following fields:

- Activity ID
- Start Date Time (with a calendar icon and a double asterisk **)
- End Date Time (with a calendar icon)
- Activity Type (dropdown menu with **)
- Activity Setting (dropdown menu with **)
- Health Care Worker CPN (text input)

Below the form is a legend: "** indicates mandatory fields". At the bottom of the form are three buttons: 'Save', 'Reset', and 'Cancel'.

Below the form is a section titled 'Activities -- Select one for editing' containing a table with the following data:

Activity ID	Activity Type	Activity Setting	Health Care Worker CPN	Start Date Time	End Date Time	To Be Deleted
NGOWEBACT000002940	T42	CR		20-12-2008 15:15	21-12-2008 20:21	
NGOWEBACT000002942	T06	CR		21-01-2008 10:15	21-01-2008 20:10	
NGOWEBACT000002941	T18	CR		20-01-2008 10:10	21-01-2008 21:21	

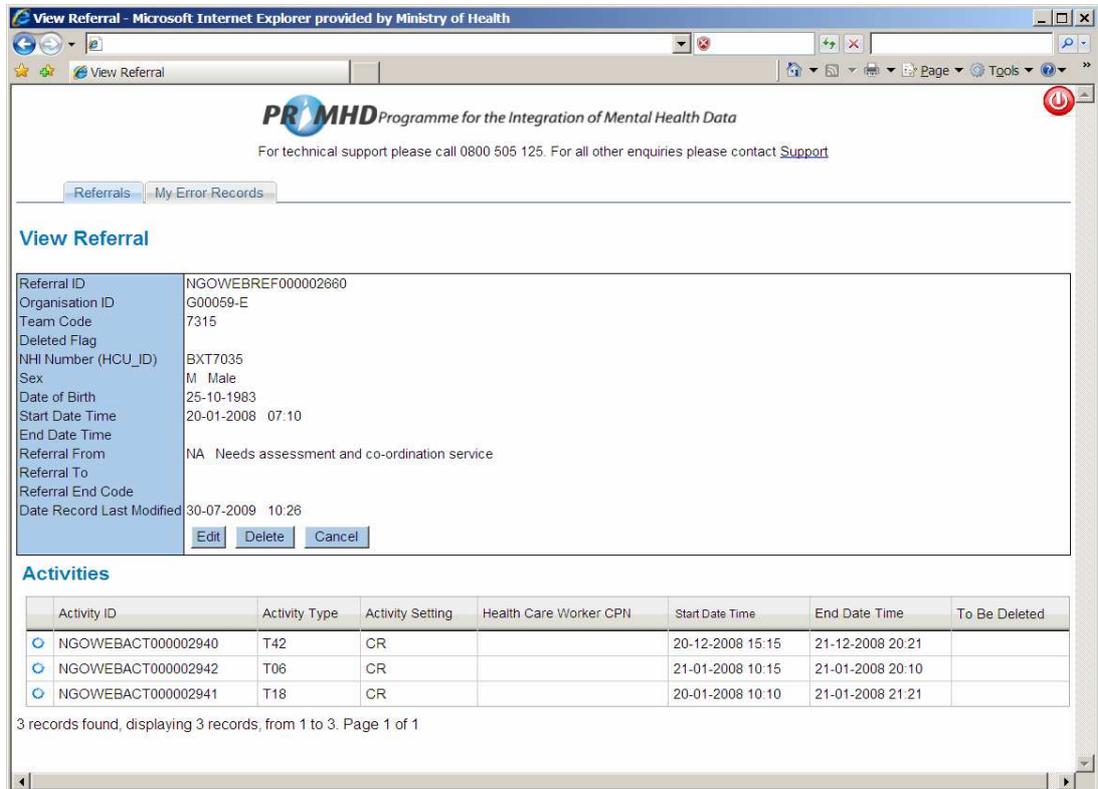
At the bottom of the table, it says: '3 records found, displaying 3 records, from 1 to 3. Page 1 of 1'.

The **Reset** button enables you to clear all the data that you have just entered in the form.

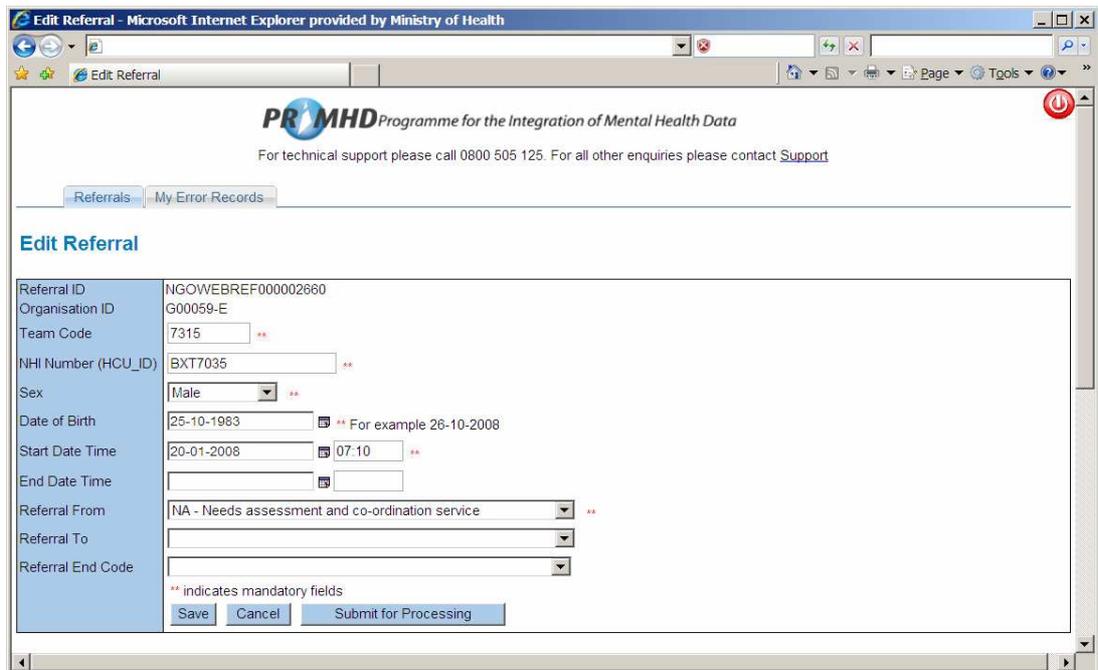
The **Cancel** button takes you back to the previous screen.

3.7 Editing Existing Referral Records

After searching, click on an individual Referral ID to select the record. The View Referral Screen will open



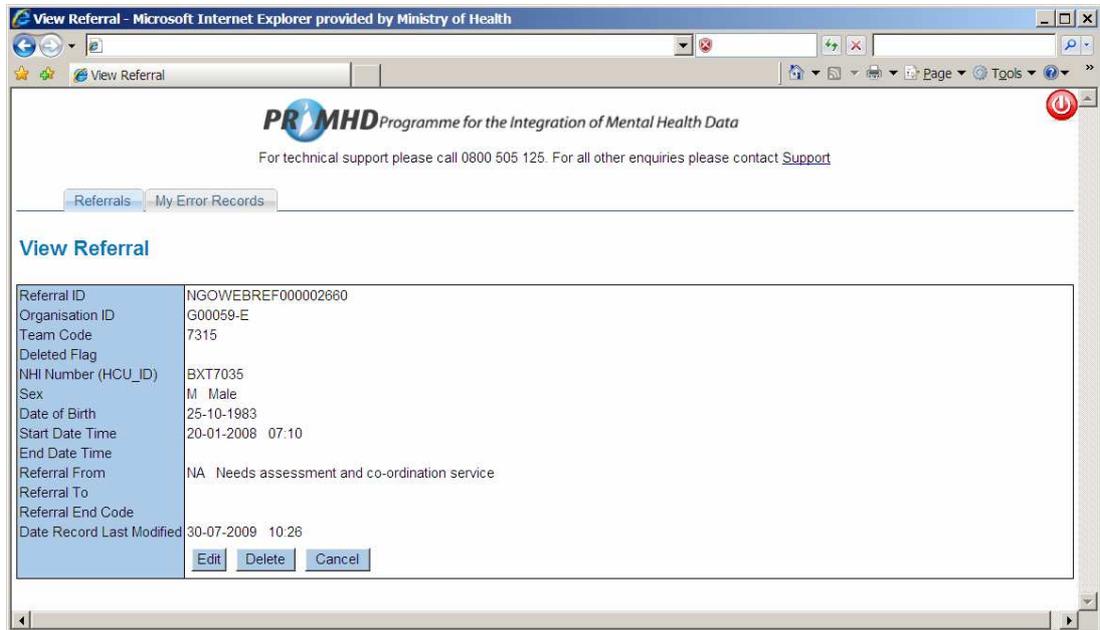
Click the **Edit** button to take you to the Edit Referral screen to edit the data.



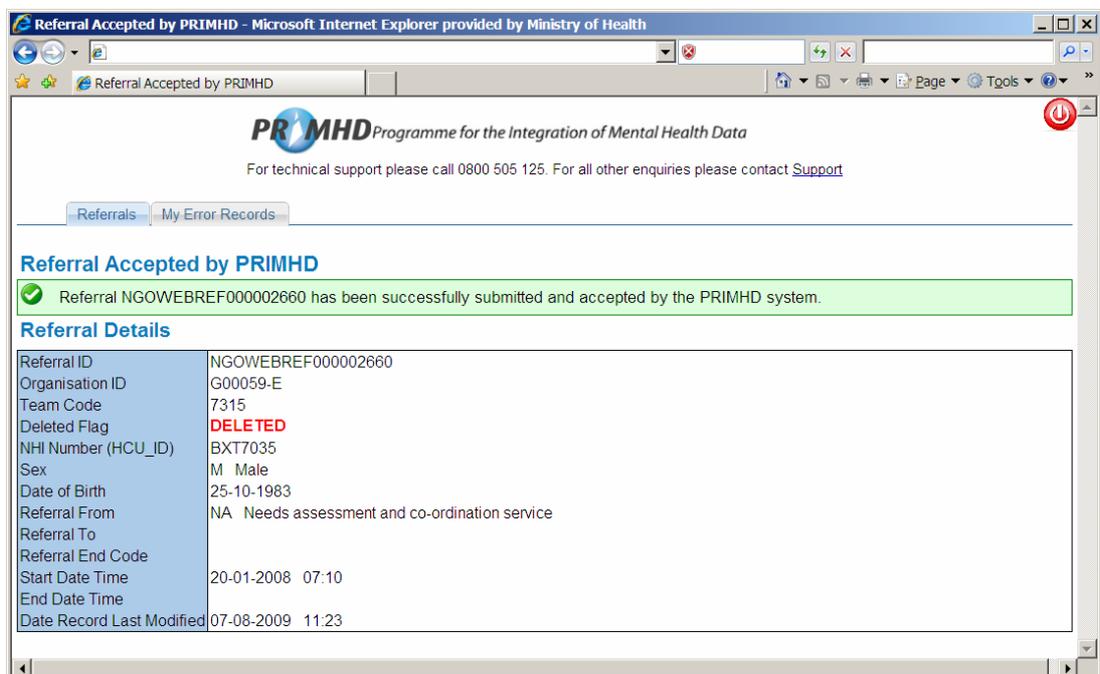
When you are ready to submit the edited Referral details, click the **Submit for Processing** button, otherwise, just click the **Save** button if you wish to continue adding activities.

3.8 Deleting Referral Records

After searching, click on an individual Referral ID to select the record. The View Referral Screen will open. To delete a Referral with its associated activities, click on the **Delete** button.



A warning message will appear asking for confirmation



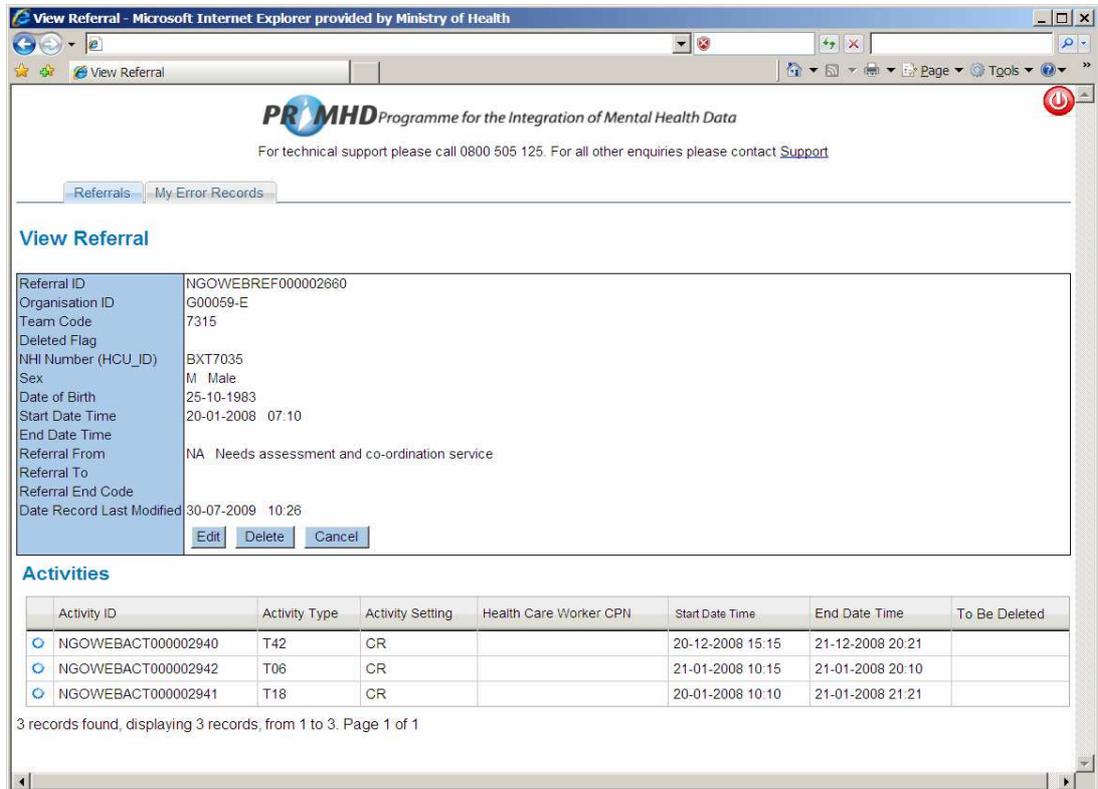
The word DELETED appears as well as date and time the record was modified.

WARNING: When you delete a Referral record, it cannot be restored. Deletion is final.

3.9

Activity Records

To search for existing activities from the Referrals screen (see Section 3.6 page 15). Click on the appropriate Referral and if there are Activities they will be listed: as shown below.



The screenshot shows a web browser window titled "View Referral - Microsoft Internet Explorer provided by Ministry of Health". The page header includes the PRIMHD logo and the text "PRIMHD Programme for the Integration of Mental Health Data". Below the header, there are tabs for "Referrals" and "My Error Records". The main content area is titled "View Referral" and displays the following details:

- Referral ID: NGOWEBREF000002660
- Organisation ID: G00059-E
- Team Code: 7315
- Deleted Flag: (empty)
- NHI Number (HCU_ID): BXT7035
- Sex: M Male
- Date of Birth: 25-10-1983
- Start Date Time: 20-01-2008 07:10
- End Date Time: (empty)
- Referral From: NA Needs assessment and co-ordination service
- Referral To: (empty)
- Referral End Code: (empty)
- Date Record Last Modified: 30-07-2009 10:26

Below the details, there are buttons for "Edit", "Delete", and "Cancel". The "Activities" section contains a table with the following data:

Activity ID	Activity Type	Activity Setting	Health Care Worker CPN	Start Date Time	End Date Time	To Be Deleted
NGOWEBACT000002940	T42	CR		20-12-2008 15:15	21-12-2008 20:21	
NGOWEBACT000002942	T06	CR		21-01-2008 10:15	21-01-2008 20:10	
NGOWEBACT000002941	T18	CR		20-01-2008 10:10	21-01-2008 21:21	

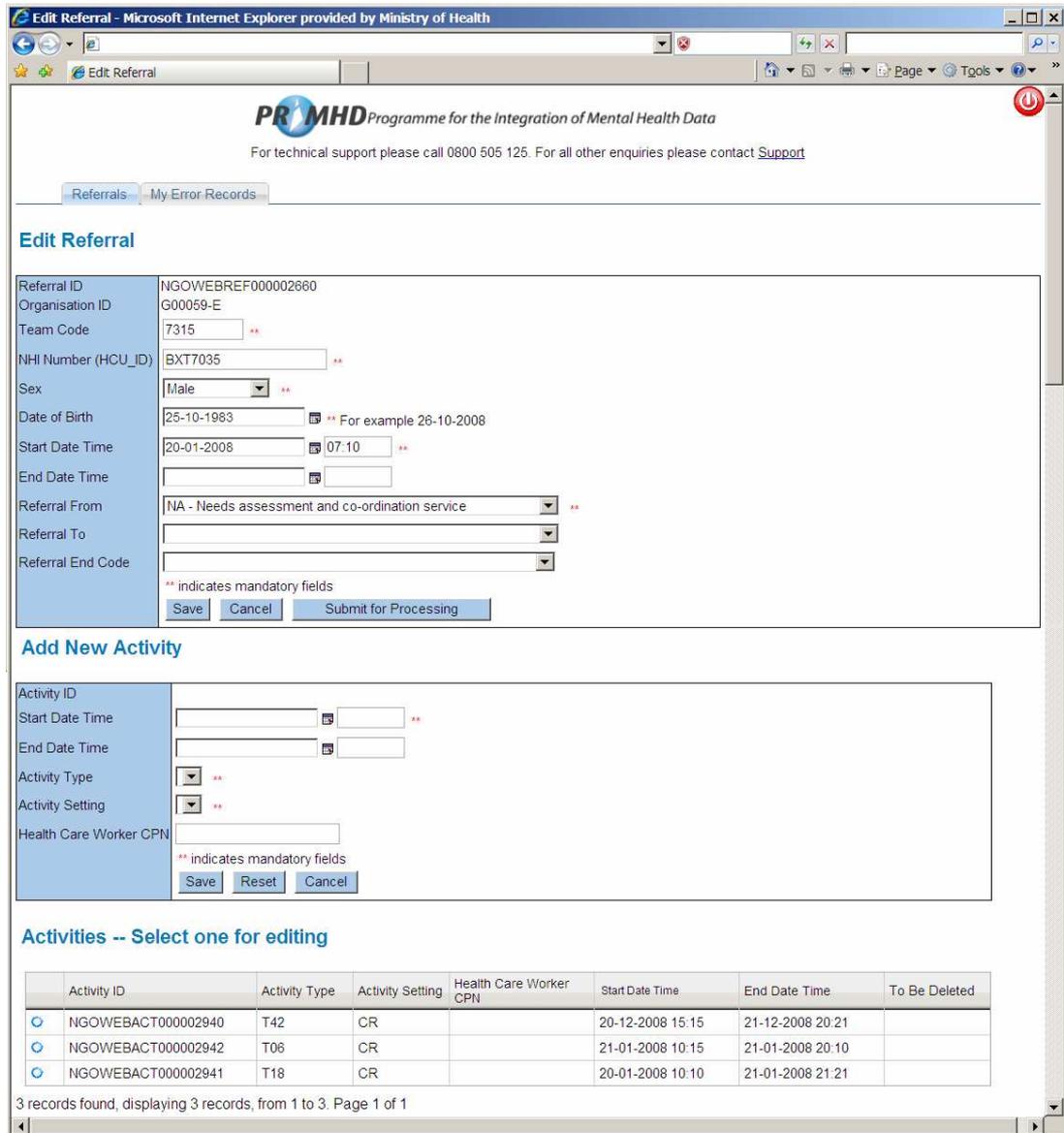
At the bottom of the activities table, it says "3 records found, displaying 3 records, from 1 to 3. Page 1 of 1".

You can click on the column headings to display the activity records in different order.

3.10

Adding New Activity Records

To add a new Activity after you have entered and saved the new Referral details or searched and found an existing Referral, click the **Edit** button and scroll down to the **Add a New Activity** form below. Enter all the details in this form and then click the **Save** button. Repeat this if there are more activity records to be entered. If multiple activities are added, these will be held in a temporary database until you are ready to submit. When you are ready to submit the data, click on the **Submit for Processing** button higher up in the referral section.



Edit Referral - Microsoft Internet Explorer provided by Ministry of Health

PRIMHD Programme for the Integration of Mental Health Data
For technical support please call 0800 505 125. For all other enquiries please contact [Support](#)

Referrals | My Error Records

Edit Referral

Referral ID: NGOWEBREF000002680
 Organisation ID: G00059-E
 Team Code: 17315 **
 NHI Number (HCU_ID): BXT7035 **
 Sex: Male **
 Date of Birth: 25-10-1983 ** For example 26-10-2008
 Start Date Time: 20-01-2008 07:10 **
 End Date Time:
 Referral From: INA - Needs assessment and co-ordination service **
 Referral To:
 Referral End Code:
 ** indicates mandatory fields
 Save Cancel Submit for Processing

Add New Activity

Activity ID:
 Start Date Time:
 End Date Time:
 Activity Type:
 Activity Setting:
 Health Care Worker CPN:
 ** indicates mandatory fields
 Save Reset Cancel

Activities -- Select one for editing

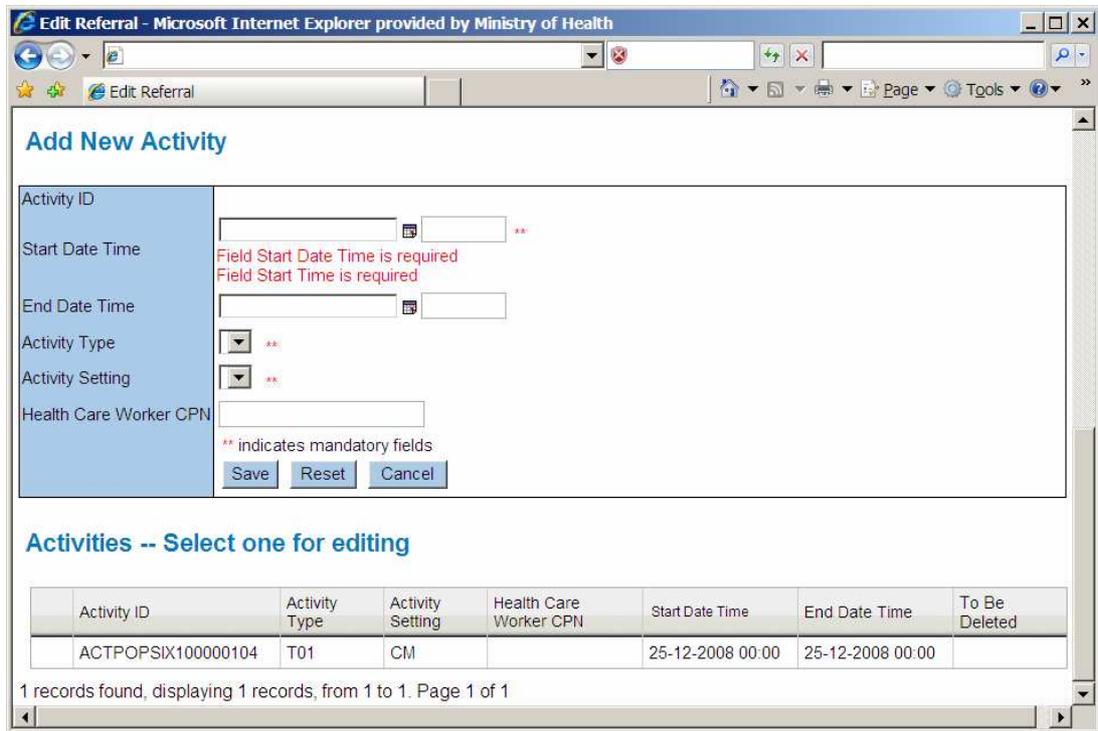
	Activity ID	Activity Type	Activity Setting	Health Care Worker CPN	Start Date Time	End Date Time	To Be Deleted
	NGOWEBACT000002940	T42	CR		20-12-2008 15:15	21-12-2008 20:21	
	NGOWEBACT000002942	T06	CR		21-01-2008 10:15	21-01-2008 20:10	
	NGOWEBACT000002941	T18	CR		20-01-2008 10:10	21-01-2008 21:21	

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

If there are no errors in your data, the activity just created will be added to the list at the bottom of the screen.

NOTE: Some validation happens after the **Save** button has been clicked and further validation happens when the **Submit for Processing** button is clicked.

Adding New Activity Records, Continued



The screenshot shows a web browser window titled 'Edit Referral - Microsoft Internet Explorer provided by Ministry of Health'. The main content area is titled 'Add New Activity' and contains a form with the following fields:

- Activity ID: **
- Start Date Time: ** (Error messages: Field Start Date Time is required, Field Start Time is required)
- End Date Time: **
- Activity Type: **
- Activity Setting: **
- Health Care Worker CPN:

Below the form, there is a legend: ** indicates mandatory fields. At the bottom of the form are 'Save', 'Reset', and 'Cancel' buttons.

Below the form is a section titled 'Activities -- Select one for editing' containing a table:

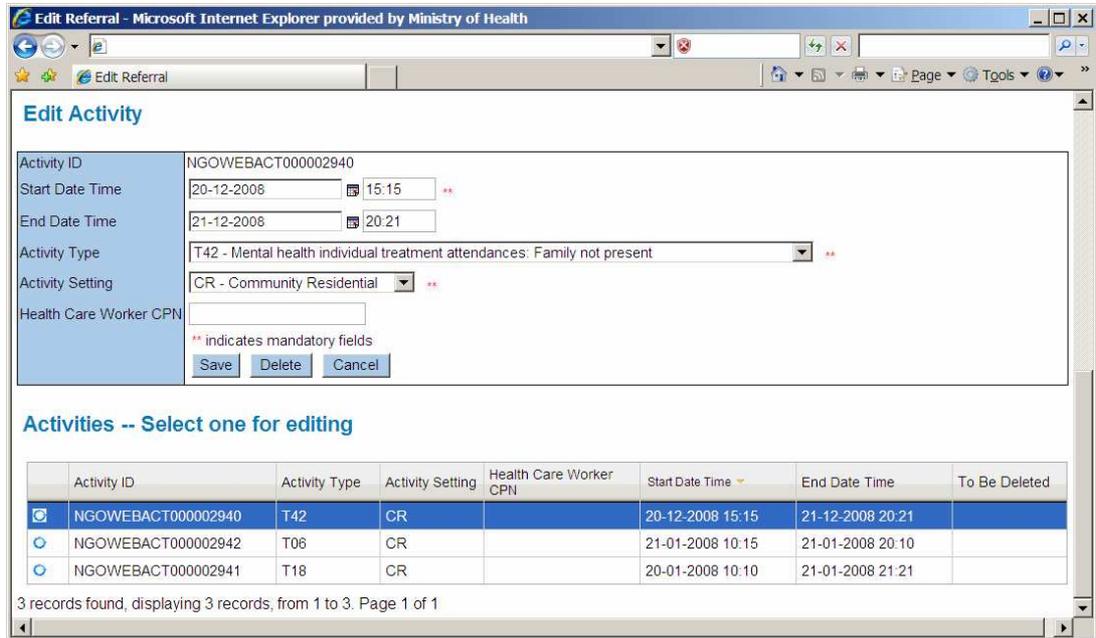
Activity ID	Activity Type	Activity Setting	Health Care Worker CPN	Start Date Time	End Date Time	To Be Deleted
ACTPOPSIX100000104	T01	CM		25-12-2008 00:00	25-12-2008 00:00	

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

If there are any errors within your data, error messages will show up with a red explanatory note. See section 3.12 page 22 on how to correct your errors.

3.11 Editing and Deleting Activity Records

To edit an Activity Record, first search and find the existing Referral, click the **Edit** button and scroll down to the list of activity records below. Click on the appropriate Activity ID and the edit form will open.

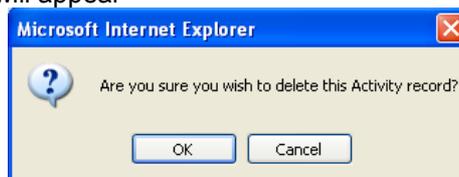


Activity ID	Activity Type	Activity Setting	Health Care Worker CPN	Start Date Time	End Date Time	To Be Deleted
NGOWEBACT000002940	T42	CR		20-12-2008 15:15	21-12-2008 20:21	
NGOWEBACT000002942	T06	CR		21-01-2008 10:15	21-01-2008 20:10	
NGOWEBACT000002941	T18	CR		20-01-2008 10:10	21-01-2008 21:21	

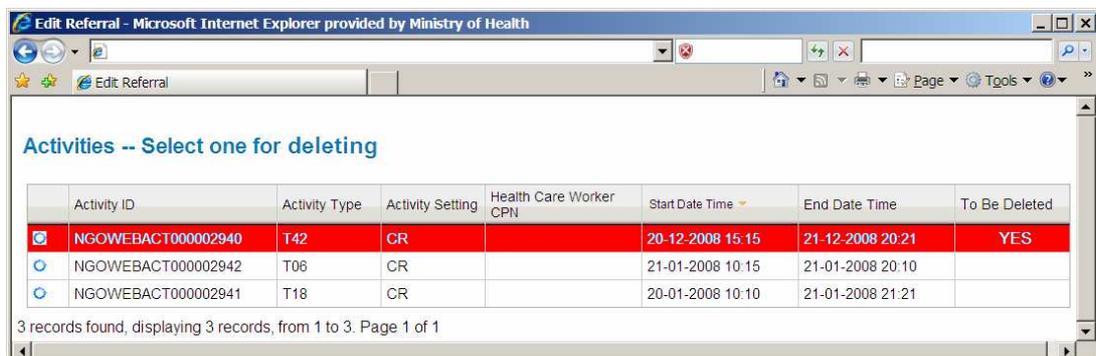
Make any appropriate changes and then click the **Save** button. This will put the form into a temporary holding database until you are ready to submit. When you are ready, click the **Submit for Processing** button higher up in the referral section.

The **Cancel** button will clear this form of any data you have just entered, and take you back to the previous screen.

You can delete an Activity by clicking on the **Delete** button on the Edit Activity form. The following warning screen will appear



Click on **OK** and the activity screen will appear with the word **Yes** in the **To Be Deleted** column.



Activity ID	Activity Type	Activity Setting	Health Care Worker CPN	Start Date Time	End Date Time	To Be Deleted
NGOWEBACT000002940	T42	CR		20-12-2008 15:15	21-12-2008 20:21	YES
NGOWEBACT000002942	T06	CR		21-01-2008 10:15	21-01-2008 20:10	
NGOWEBACT000002941	T18	CR		20-01-2008 10:10	21-01-2008 21:21	

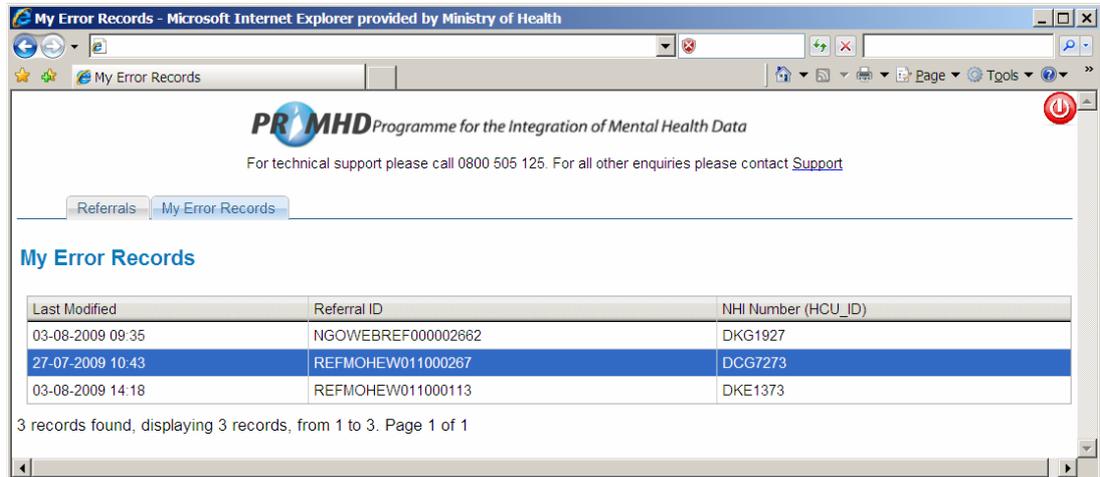
When you are ready, click the **Submit for Processing** button higher up in the referral section.

3.12

My Error Records

Where submitted data has been rejected, the information will appear on the My Error Records page.

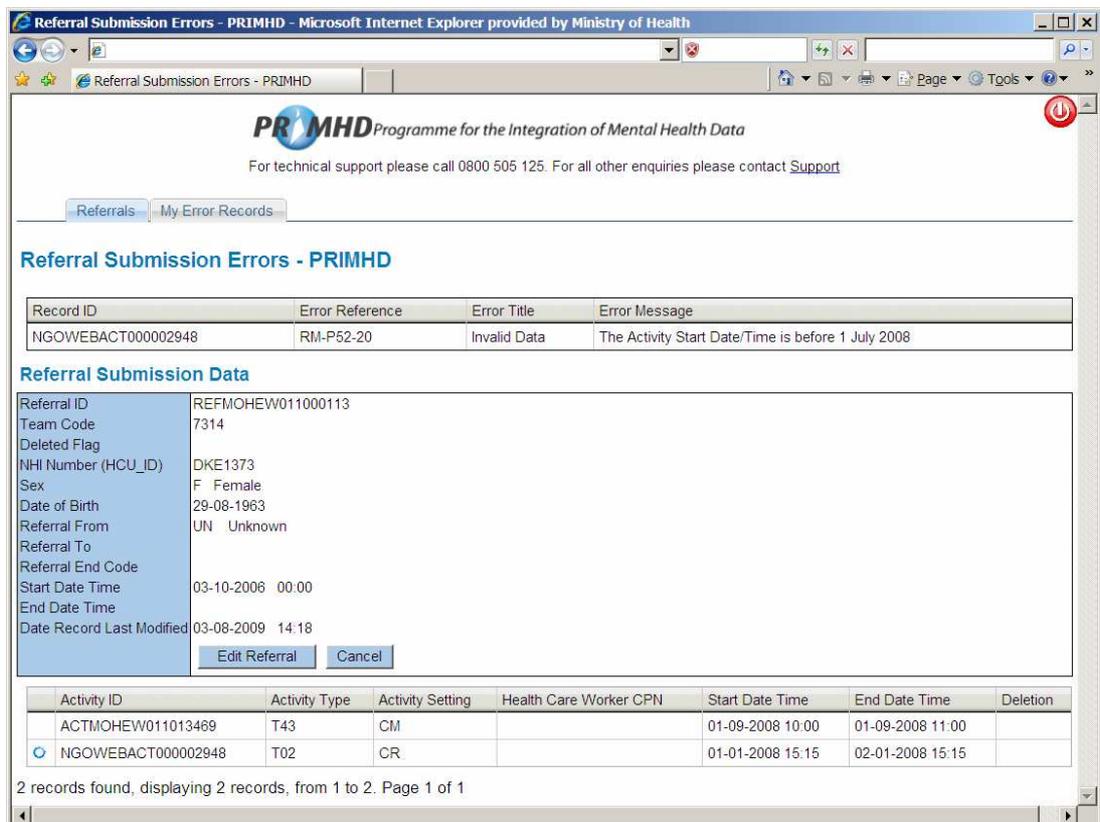
To correct any errors, click on the **My Error Records** tab at the top of the screen



Last Modified	Referral ID	NHI Number (HCU_ID)
03-08-2009 09:35	NGOWEBREF000002662	DKG1927
27-07-2009 10:43	REFMOHEW011000267	DCG7273
03-08-2009 14:18	REFMOHEW011000113	DKE1373

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

Click on any of the Referral IDs in the list to take you to a screen showing the errors for that Referral. Then click on the **Edit Referral** button to correct or update erroneous data.



Record ID	Error Reference	Error Title	Error Message
NGOWEBACT000002948	RM-P52-20	Invalid Data	The Activity Start Date/Time is before 1 July 2008

Referral Submission Data

Referral ID	REFMOHEW011000113
Team Code	7314
Deleted Flag	
NHI Number (HCU_ID)	DKE1373
Sex	F Female
Date of Birth	29-08-1963
Referral From	UN Unknown
Referral To	
Referral End Code	
Start Date Time	03-10-2006 00:00
End Date Time	
Date Record Last Modified	03-08-2009 14:18

Activity ID	Activity Type	Activity Setting	Health Care Worker CPN	Start Date Time	End Date Time	Deletion
ACTMOHEW011013469	T43	CM		01-09-2008 10:00	01-09-2008 11:00	
NGOWEBACT000002948	T02	CR		01-01-2008 15:15	02-01-2008 15:15	

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

3.13 To Log Out of the System

When you are ready to log out of the system, click the **Logoff** button in the top right hand corner of the screen:



3.14 Trouble Shooting

Problem	Suggested resolution
Incorrect password entered	Ensure the CAPSLOCK key is not switched on and try to enter your password again – passwords are case sensitive. If you forget your password please email: primhduserinterface@moh.govt.nz
Screen freeze	Check that your internet connection is still working and if in doubt, contact your Internet Service Provider.
Timed out	If the system is not used for fifteen minutes, it will time out and any data on screen will not be saved. If a user's session is terminated the user will have to restart their browser before attempting to log in to the system again.
Cannot get to the login page	Check that your internet connection is still working and if in doubt, contact your Internet Service Provider

4. Detailed Screens

4.1 Introduction

The PRIMHD NGO Web Data Entry System is an application in which all the work is done via the system's screens detailed in this chapter.

There is a sub-section for each of the main screens:

1. Logging In (4.2)
2. "Referral and Activity Records" (4.3)
3. "My Error Records" - working with error records (4.4)
4. Logging Out (4.5)

If you are using this section for reference only, please note:

- **Record Key Click** means select a record in the list
- The self-explanatory error messages are defined in the File Specification – see Associated Documents.
- The editing specified with the individual fields uses common sense business and data validation rules like bed-night activities cannot take place over the phone. These business and data validation rules are more fully defined in the PRIMHD File Specification – see Associated Documents.

4.2 Logging In

4.2.1 Login Screen

To log into the PRIMHD system, click in the **Username field** and type your User ID (that will have been supplied to you by the Ministry's Data Management Services (DMS) National Collections Team) and your **Password** (which appears as a series of dots rather than letters). Click on **Login** to enter the system.



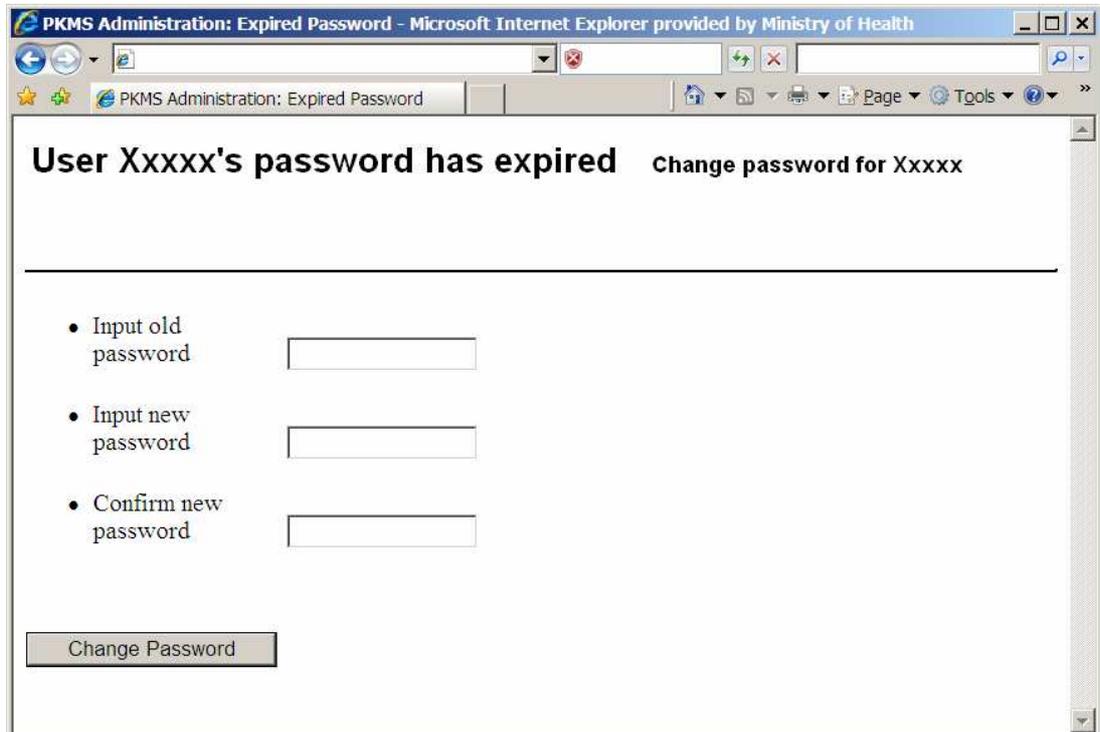
Note:

1. *If you are logging in following a timeout or having previously logged off the **NGO Web Data Entry System**, you must close and reopen your browser first before re-attempting to login.*
2. *The **[Forgot Password]** functionality is still to be introduced*

Logging In, Continued

4.2.2 Change Password Screen

The first time the system is accessed, a screen will appear prompting you to change your password.



PKMS Administration: Expired Password - Microsoft Internet Explorer provided by Ministry of Health

PKMS Administration: Expired Password

User Xxxxx's password has expired Change password for Xxxxx

- Input old password
- Input new password
- Confirm new password

Change Password

Enter your old password and your new password and then reconfirm your new password. The new password needs to be at least 6 characters long and is case-sensitive.

Click the [Change Password](#) button and your password will be updated. There is no confirmation screen when changing your password. If successful, you will then be transferred to the Search Referral screen to resume normal operation of the system.

If a user does not use the system for more than fifteen minutes, they will be automatically logged out.

If a user is automatically logged out, they will be prompted to log in again when they return to using the system.

If a user is automatically logged out, they will have to restart or reload their browser before attempting to reconnect or log in again.

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

4.3 Referral and Activity Records

4.3.1 Introduction

The following sub-sections have the screens to create, update or delete Referral and Activity records data in the NGO Web Data Entry System.

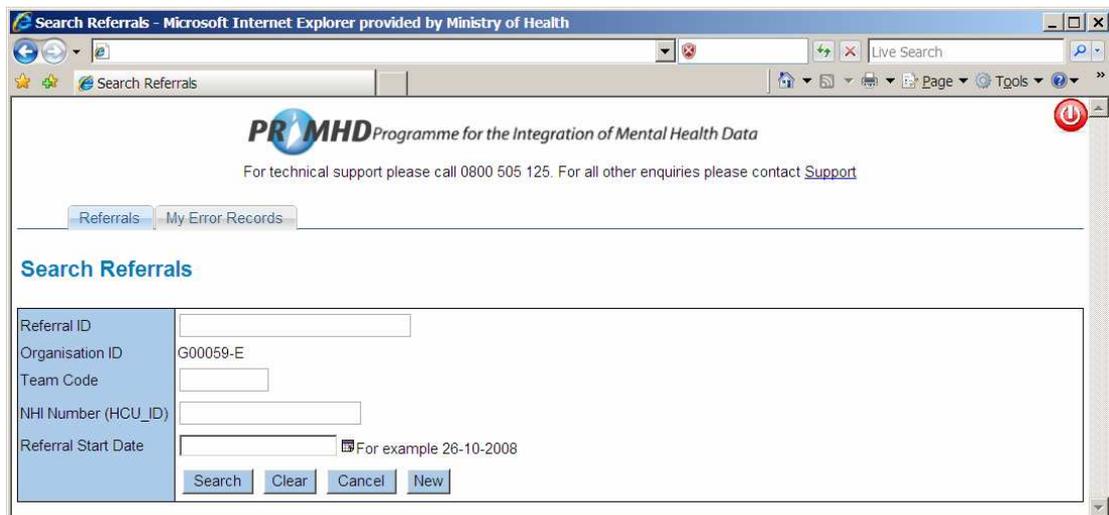
1. Search Referrals Screen (4.3.2) and Search Referrals Results Screen (4.3.3)
2. Add Referral Records (4.3.4)
3. View Referral Records and Activity Records (4.3.5)
4. Edit Referral (4.3.6), Add New Activity (4.3.7) and Edit/Update/Delete Activity (4.3.8)
5. Referral Accepted or Referral Rejected by PRIMHD (4.3.9 and 4.3.10)

In each of the sub-sections (listed above) are the following details of each Screen:

- Screenshot diagram of screen used and its primary function,
- The operational buttons and their function,
- Navigated from and Navigate to, with Other Comments

4.3.2 Search Referrals Screen

This search screen (aka The Start Screen) appears after the user has logged on or clicked the referral tab that enables the user to initiate a search for a Referral Record.

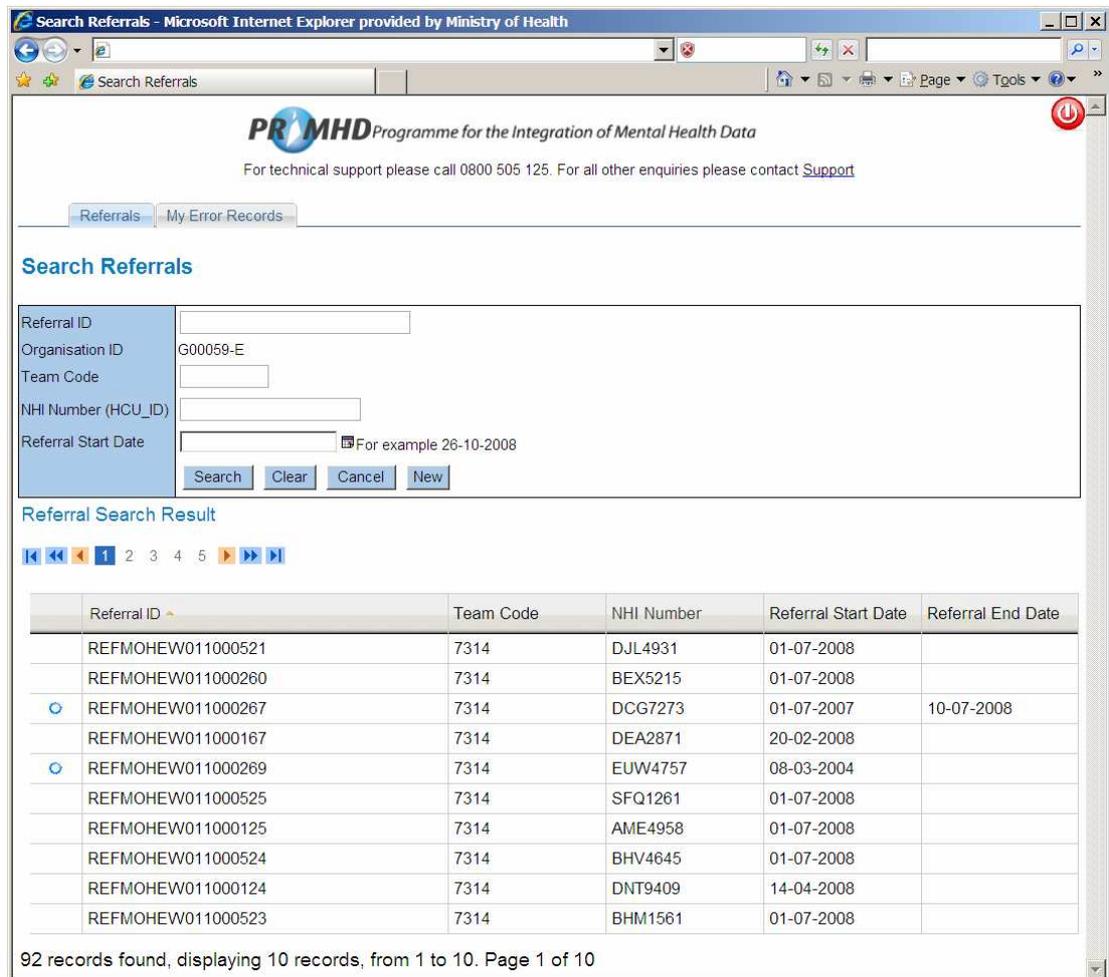


Function	Get a Referral Record to work with.	
Data Entry Notes	Searches are initiated via the Referral ID, NHI Number, Team Code or Referral Start Date, with some fields prompting a dropdown list of options of previously used entries. Wild card characters can be used.	
Button Functions	Button	Function
	[Cancel]	Clears both the search entries and the search result
	[Clear]	Clears all the entries for a search
	[New]	Start a new referral. Goes to Section 4.3.4
	[Search]	Triggers a search for all referrals meeting the specified criteria. Uses wild card with a blank meaning all values. Therefore, a search with all blanks returns all referrals for an organisation.
Record Key Click	Not Applicable for starting a search	
Navigated from	1. Section 4.2.1 Log In Screen; or 2. At anytime by clicking the [Referrals] tab	
Navigate to	Section 4.3.3 Search Referral Results	
Other Comment	If the Support link at the top of the screen is selected, and eMail to the Ministry's Help Desk will be automatically initiated.	

Referral and Activity Records, Continued

4.3.3 Search Referral Results

The following Results Screen appears after a Search Referral has been initiated as describe in Section 4.3.2 previously.



Search Referrals - Microsoft Internet Explorer provided by Ministry of Health

PRIMHD Programme for the Integration of Mental Health Data
For technical support please call 0800 505 125. For all other enquiries please contact [Support](#)

Referrals | My Error Records

Search Referrals

Referral ID

Organisation ID G00059-E

Team Code

NHI Number (HCU_ID)

Referral Start Date For example 26-10-2008

Referral Search Result

1 2 3 4 5

Referral ID	Team Code	NHI Number	Referral Start Date	Referral End Date
REFMOHEW011000521	7314	DJL4931	01-07-2008	
REFMOHEW011000260	7314	BEX5215	01-07-2008	
REFMOHEW011000267	7314	DCG7273	01-07-2007	10-07-2008
REFMOHEW011000167	7314	DEA2871	20-02-2008	
REFMOHEW011000269	7314	EUW4757	08-03-2004	
REFMOHEW011000525	7314	SFQ1261	01-07-2008	
REFMOHEW011000125	7314	AME4958	01-07-2008	
REFMOHEW011000524	7314	BHV4645	01-07-2008	
REFMOHEW011000124	7314	DNT9409	14-04-2008	
REFMOHEW011000523	7314	BHM1561	01-07-2008	

92 records found, displaying 10 records, from 1 to 10. Page 1 of 10

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 in Section 4.3.2 can start another search.
Button Functions	Not applicable for results, but the search functionality in Section 4.3.2 can start another search.
Record Key Click	After a search returns values, click the desired referral in the result screen.
Navigate from	Section 4.3.2 Search Referral
Navigate to	Section 4.3.5 View Referral

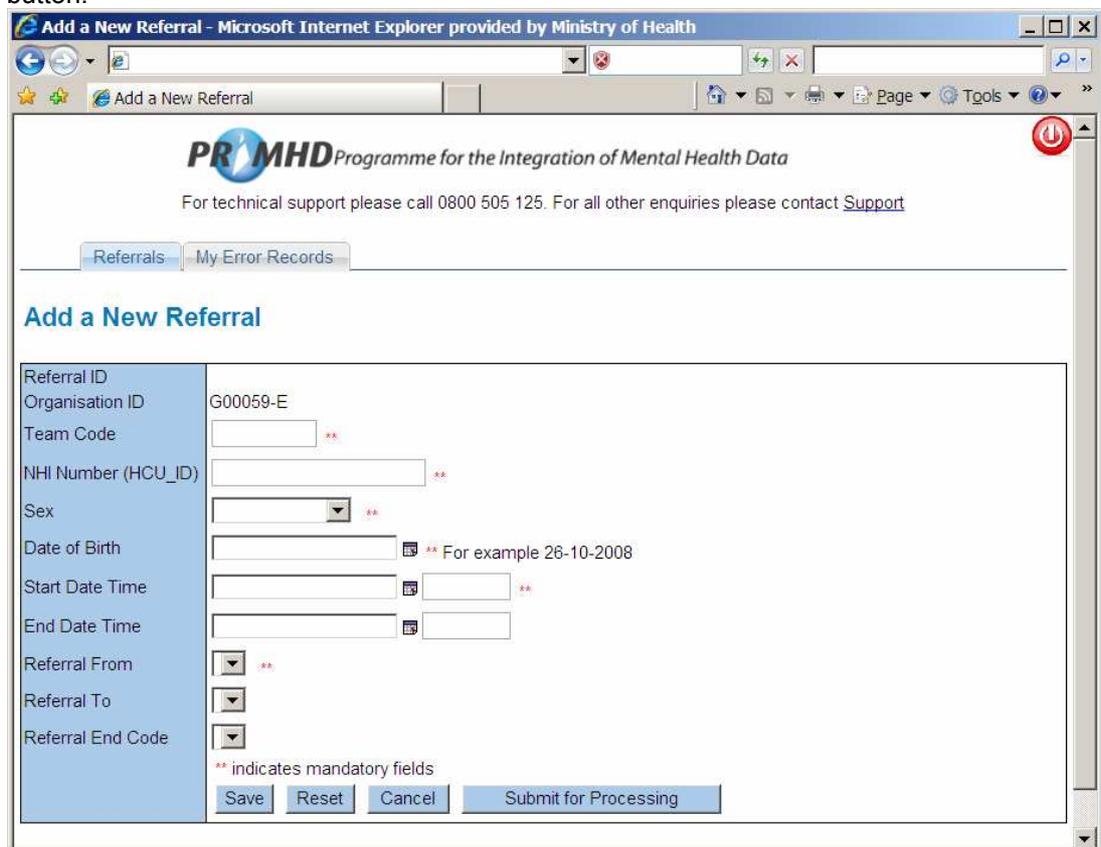
Continued on next page

Referral and Activity Records, Continued

Other Comments	<ol style="list-style-type: none"> The page number selection facilities to view the search results are . The paired arrow functions are: <ul style="list-style-type: none">  to go to the first page - its opposite symbol goes to the last page  to go 5 pages left  to go one page left The blue and white circle on the left shows the activity record has not been submitted or it has errors. Also shown is the count of selected records (92), 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. Search results can be sorted by any column by clicking on the desired column heading. The referral colour banding is: <ul style="list-style-type: none"> Dark Blue - the last referral looked at Light Blue - the referral result the cursor is positioned on
-----------------------	---

4.3.4 Add New Referral

The following Add New Referral Record Screen appears after a Search Referral has been initiated as describe in Section 4.3.2 previously and the User has clicked on the **[New]** button.



Add a New Referral

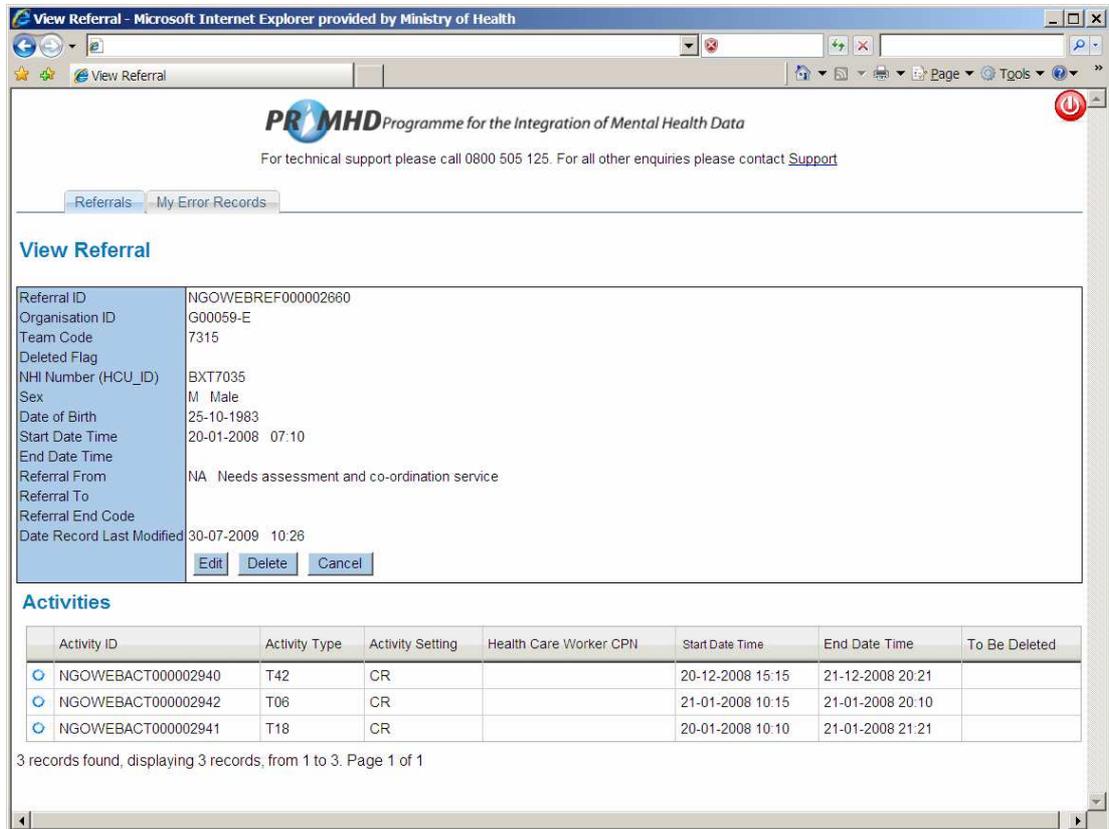
Referral ID
 Organisation ID: G00059-E
 Team Code: **
 NHI Number (HCU_ID): **
 Sex: **
 Date of Birth: ** For example 26-10-2008
 Start Date Time: **
 End Date Time: **
 Referral From: **
 Referral To:
 Referral End Code:

** indicates mandatory fields

Save Reset Cancel Submit for Processing

Referral and Activity Records, Continued

4.3.5 View Referral The following View Referral Screen appears after the user selects a Referral Record to view from the Search Referral Results list as describe in Section 4.3.3 previously.

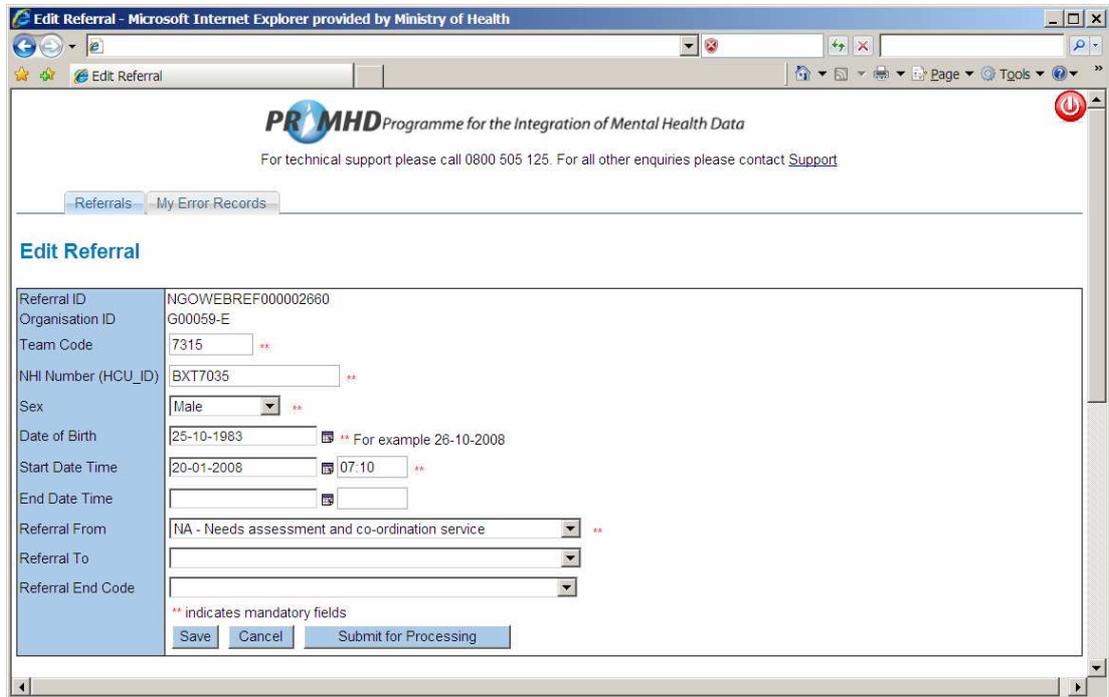


Function	Display the referral and its activities. Also leads to editing or deletion of the referral and its activities.	
Data Entry Notes	Not Applicable	
Button Functions	Button	Function
	[Cancel]	Transfers the user back to the search screen.
	[Delete]	After confirmation, the referral and all its associated activity records are deleted
	[Edit]	Transfers to editing of a referral Section 4.3.6
Record Key Click	Not Applicable	
Navigated from	Section 4.3.3 Search Screen Results	
Navigate to	either: <ul style="list-style-type: none"> Section 4.3.6 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 has not been submitted or it has errors.	

Referral and Activity Records, Continued

4.3.6 Editing a Referral

The following Edit Referral Screen appears after the user selects the [Edit] button from the previous View Referral Screen as describe in Section 4.3.5 previously.

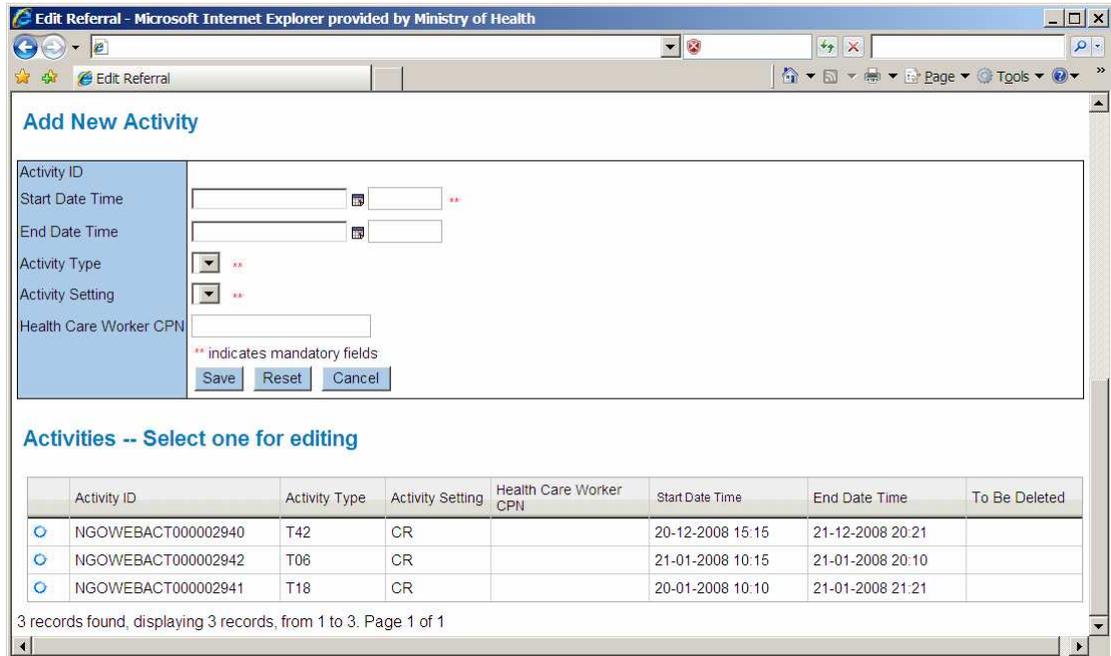


Function	Edit a referral. This includes deleting the referral. The lower half of this screen is also used for editing activities – see Section 4.3.5.	
Data Entry Notes	Mandatory fields are shown with an **..	
Referral Button Functions	Button	Function
	[Cancel]	The Referral [Cancel] transfers the user back to the section 4.3.5 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.
Record Key Click	Editing of an activity is triggered by clicking the mouse over the activity	
Navigated from	Section 4.3.5 View Referral screen	
Navigates to	The last search results – do this by clicking the referral tab. By clicking [Submit for Processing] control switches to: <ul style="list-style-type: none"> Section 4.3.9 Referral Accepted by PRIMHD (if no errors) Section 4.3.10. Referral Rejected by PRIMHD 	
Other Comment	None.	

Referral and Activity Records, Continued

4.3.7 Add New Activity

The following Add New Activity Screen is accessed by scrolling up or down in the Edit Referral Screen and appears below the Edit Referral Screen as describe in Section 4.3.6 previously.



Add New Activity

Activity ID:

Start Date Time: **

End Date Time: **

Activity Type: **

Activity Setting: **

Health Care Worker CPN:

** indicates mandatory fields

Activities -- Select one for editing

Activity ID	Activity Type	Activity Setting	Health Care Worker CPN	Start Date Time	End Date Time	To Be Deleted
NGOWEBACT000002940	T42	CR		20-12-2008 15:15	21-12-2008 20:21	
NGOWEBACT000002942	T06	CR		21-01-2008 10:15	21-01-2008 20:10	
NGOWEBACT000002941	T18	CR		20-01-2008 10:10	21-01-2008 21:21	

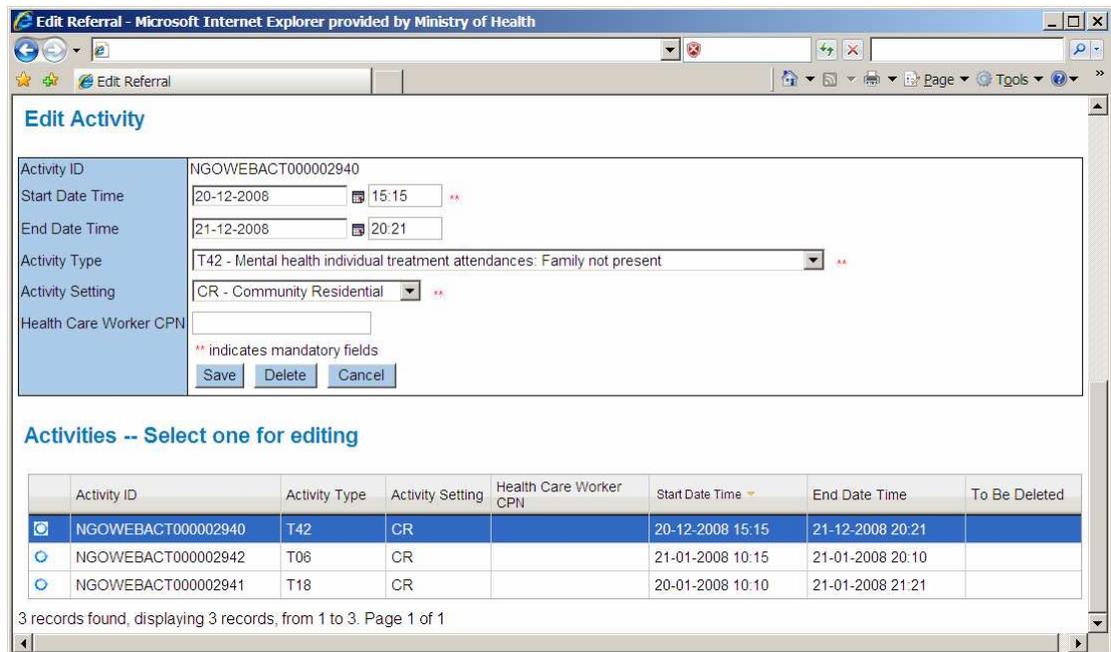
3 records found, displaying 3 records, from 1 to 3. Page 1 of 1

Function	Adding a new Activity Record is possible when editing a Referral Record and no other Activity Record(s) have been selected for editing.	
Data Entry Notes	Mandatory fields are shown with an **.	
Adding an Activity's Button Functions	Button	Function
	[Cancel]	When adding a record, the [Cancel] clears out the new activity record
	[Reset]	This is the same as [Cancel]
	[Save]	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)
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	
Navigated from	Working on 4.3.6 Editing a Referral	
Navigates to	By clicking [Submit for Processing] control switches to: <ul style="list-style-type: none"> Section 4.3.9 Referral Accepted by PRIMHD (if no errors) Section 4.3.10. Referral Rejected by PRIMHD (if an error is detected). 	

Referral and Activity Records, Continued

4.3.8 Edit or Delete Activity

The following Edit Activity Screen appears after the user has selected an Activity record to edit/update or delete from the View Activities List as shown below and in Section 4.3.6 previously.

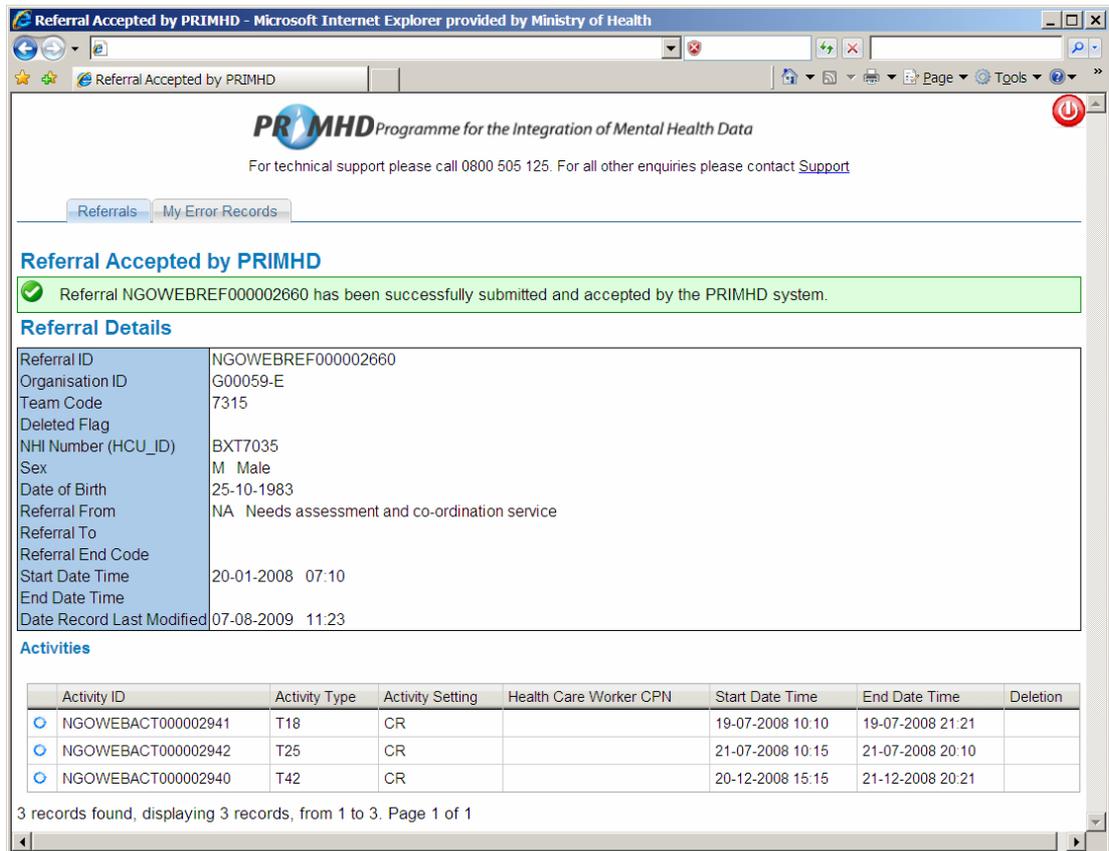


Function	Activity Records work can be either: <ul style="list-style-type: none"> Editing or deleting an Activity Record, using the above screen; or Adding a new Activity Record – see Section 4.3.7 on previous page. An Activity Record is able to be edited by selecting the desired entry in the list.								
Data Entry Notes	Mandatory fields are shown with an ** .								
Editing or Deleting an Activity's Button Functions	<table border="1"> <thead> <tr> <th>Button</th> <th>Function</th> </tr> </thead> <tbody> <tr> <td>[Cancel]</td> <td>[Cancel] clears out the new activity record and the screen appears ready to add a new activity</td> </tr> <tr> <td>[Delete]</td> <td>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.</td> </tr> <tr> <td>[Save]</td> <td>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</td> </tr> </tbody> </table>	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.	[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
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.								
[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								
Record Key Click	Editing of an activity is triggered by clicking the mouse on an activity in the list, as shown highlighted in dark blue above.								
Navigated from	Section 4.3.6 Editing a Referral								
Navigated to	By clicking [Submit for Processing] control switches to: <ul style="list-style-type: none"> Section 4.3.9 Referral Accepted by PRIMHD (if no errors) Section 4.3.10. Referral Rejected by PRIMHD (if an error is detected) 								

Referral and Activity Records, Continued

4.3.9 Referral Accepted by PRIMHD

The following Referral Accepted by PRIMHD Screen appears after the user has selected and clicked on the **[Submit for Processing]** button and the Referral Record, including all the attached Activity Records has been successfully submitted and loaded into the PRIMHD database.



Referral Accepted by PRIMHD

Referral NGOWEBREF000002660 has been successfully submitted and accepted by the PRIMHD system.

Referral Details

Referral ID	NGOWEBREF000002660
Organisation ID	G00059-E
Team Code	7315
Deleted Flag	
NHI Number (HCU_ID)	BXT7035
Sex	M Male
Date of Birth	25-10-1983
Referral From	NA Needs assessment and co-ordination service
Referral To	
Referral End Code	
Start Date Time	20-01-2008 07:10
End Date Time	
Date Record Last Modified	07-08-2009 11:23

Activities

Activity ID	Activity Type	Activity Setting	Health Care Worker CPN	Start Date Time	End Date Time	Deletion
NGOWEBACT000002941	T18	CR		19-07-2008 10:10	19-07-2008 21:21	
NGOWEBACT000002942	T25	CR		21-07-2008 10:15	21-07-2008 20:10	
NGOWEBACT000002940	T42	CR		20-12-2008 15:15	21-12-2008 20:21	

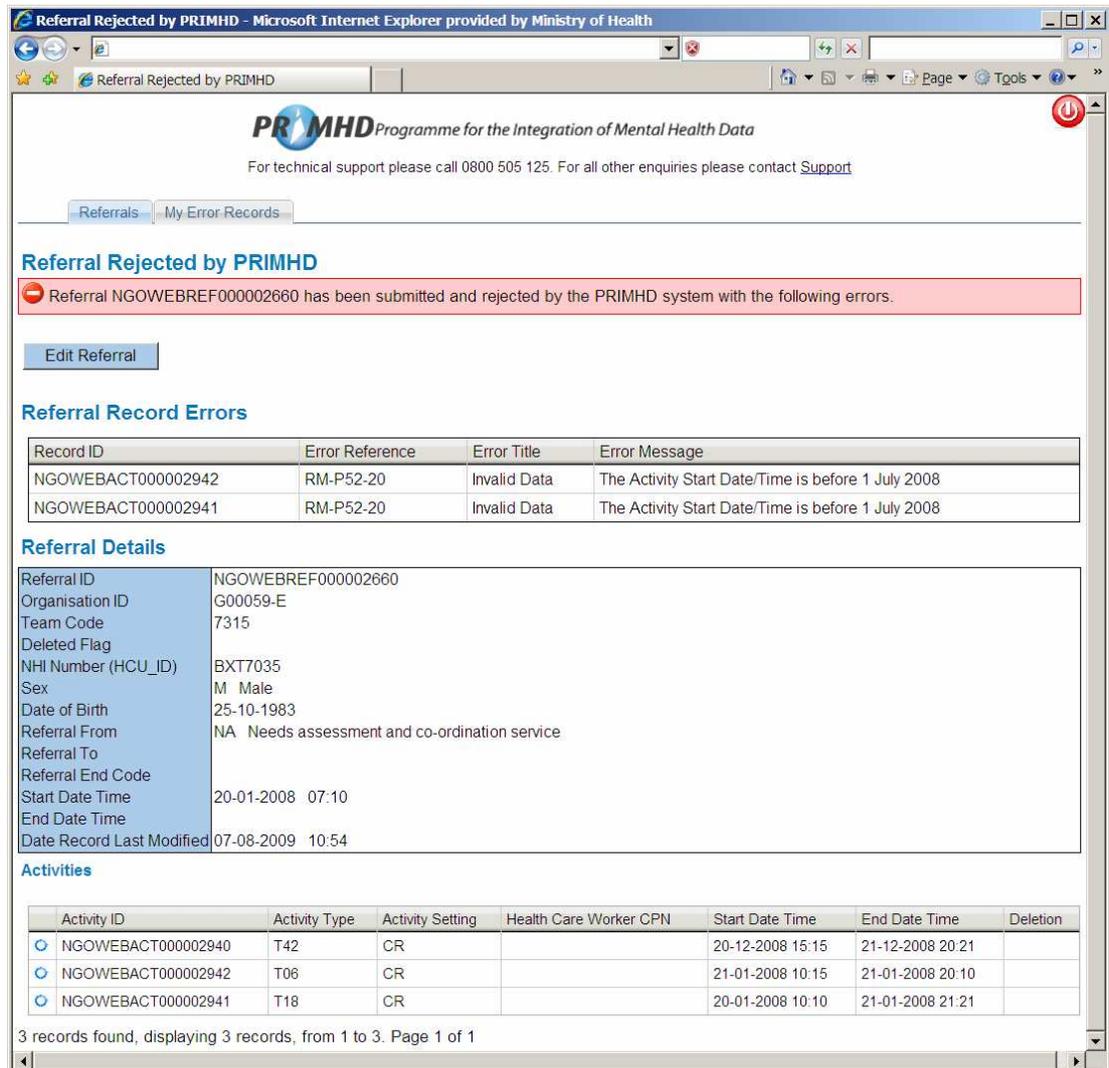
3 records found, displaying 3 records, from 1 to 3. Page 1 of 1

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
Navigated from	By successfully submitting a referral without errors.
Navigates to	The referrals tab or else log off

Referral and Activity Records, Continued

4.3.10 Referral Rejected by PRIMHD

The following Referral Rejected by PRIMHD Screen appears after the user has selected and clicked on the **[Submit for Processing]** button and the Referral Record, and/or any of the attached Activity Records has been unsuccessfully submitted and failed to be loaded into the PRIMHD database.



Referral Rejected by PRIMHD

Referral NGOWEBREF000002660 has been submitted and rejected by the PRIMHD system with the following errors.

[Edit Referral](#)

Referral Record Errors

Record ID	Error Reference	Error Title	Error Message
NGOWEBACT000002942	RM-P52-20	Invalid Data	The Activity Start Date/Time is before 1 July 2008
NGOWEBACT000002941	RM-P52-20	Invalid Data	The Activity Start Date/Time is before 1 July 2008

Referral Details

Referral ID	NGOWEBREF000002660
Organisation ID	G00059-E
Team Code	7315
Deleted Flag	
NHI Number (HCU_ID)	BXT7035
Sex	M Male
Date of Birth	25-10-1983
Referral From	NA Needs assessment and co-ordination service
Referral To	
Referral End Code	
Start Date Time	20-01-2008 07:10
End Date Time	
Date Record Last Modified	07-08-2009 10:54

Activities

Activity ID	Activity Type	Activity Setting	Health Care Worker CPN	Start Date Time	End Date Time	Deletion
NGOWEBACT000002940	T42	CR		20-12-2008 15:15	21-12-2008 20:21	
NGOWEBACT000002942	T06	CR		21-01-2008 10:15	21-01-2008 20:10	
NGOWEBACT000002941	T18	CR		20-01-2008 10:10	21-01-2008 21:21	

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

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 returns the user to the Edit Referral Screen as previously detailed in Section 4.3.6. NOTE: 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

Continued on next page

Referral and Activity Records, Continued

Navigated from	<ul style="list-style-type: none"> • Submitting a Referral Record or associated Activity Records which have errors – see Section 4.3.6 Editing a Referral and Section 4.3.7 Add New Activity and Section 4.3.8 Edit or Delete Activity • Selecting and clicking on a record with an error that is listed in My Error Records, Section 4.3.10
Navigates to	<p>[Edit Referral] – see above. If a user does not want to edit/update this Referral Record straight away, then they can return to correct it at a later time and they can select the “Referrals” or “My Error Records” tab option or Log Off.</p>
Other Comment	<ol style="list-style-type: none"> 1. The following text appears in the record identifier to signify what record type requires attention: <ul style="list-style-type: none"> • Referral Record IDs have “REF” in the middle of the identifier • Activity Record IDs have “ACT” in the middle of the identifier 2. A blue and white circle in the left most column signifies the record data is either unsubmitted or it contains errors.

4.4 My Error Records

4.4.1 Introduction

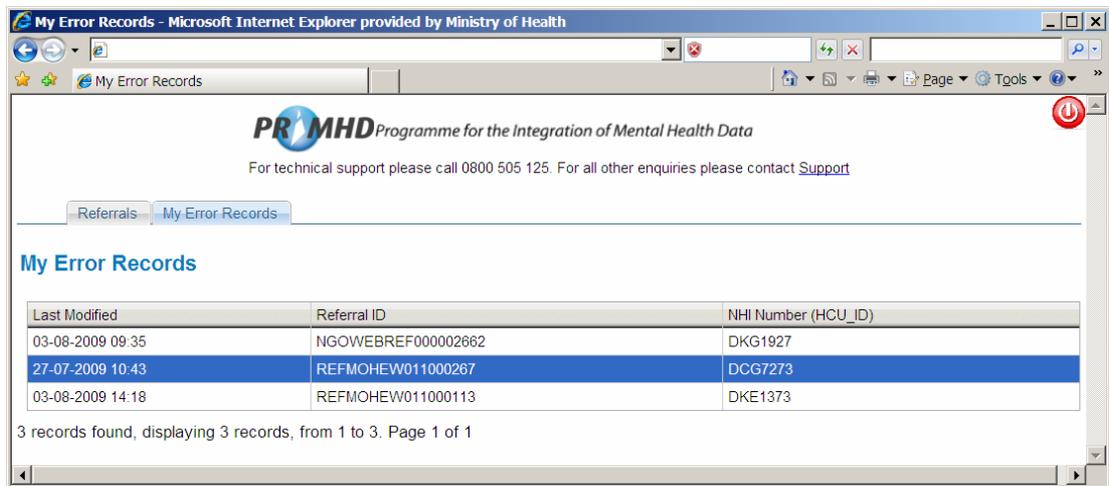
To view and correct Referral and Activity records data that is incorrect in the NGO Web Data Entry System the user first needs to select and click on the My Error Records tab.

In this section are the following details of each Screen;

- Screenshot diagram of screen used and its primary function,
- The operational buttons and their function,
- Navigated from and Navigate to, with Other Comments

4.4.2 My Error Records

The following list of Referral Records appears in the My Error Records Screen after the user has selected and clicked on the My Error Records tab to view and correct Referral and Activity records data that is incorrect in the NGO Web Data Entry System.



Function	This tab displays all the NGO Referral Records that have been rejected by the PRIMHD database due to data errors. The error may be in the Referral Record or an associated Activity Record.
Data Entry Notes	None.
Button Functions	None.
Record Key Click	Brings up the referral for viewing
Navigated from	Clicking "My Error Records" tab
Navigates to	See Record Key Click

4.5 Logging Out

4.5.1 Introduction

The “Log Out” icon is situated in the top right corner of each screen. The icon is a red circular button with a white universal “OFF” symbol as shown in the following screen.



4.5.2 Logging Out

To finish or “log-out” from the NGO Web Data Entry System select and click on the “Log Out” icon situated in the top right corner of the screen. The system will perform the “log-out” procedure and display the following confirmation screen upon successful “log-out”.



Note:

1. **Once you have logged out of the NGO Web Data Entry System you must close and reopen your browser before attempting to log in again**
2. **A user will be automatically logged out of the NGO Web Data Entry System after fifteen minutes of inactivity.**

5. Terminology

5.1 Introduction

This chapter is intended as a guide for the use of the data and other associated terms in the PRIMHD NGO Web Data Entry System. It is expected that readers will use this chapter for general reference purposes when they have a query about data, the fieldnames or other terminology used on the record screens.

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.
-

5.2 Data Fieldnames

5.2.1 Introduction

The terminology for the data fieldnames of this section of the User Guide lists each fieldname in alphabetical order and provides supporting information of the interpretation or meaning of the data fieldname, its guide for use and the section reference of the records screen that it is used for in the PRIMHD NGO Web Data Entry System.

Guideline notes for use of this section are:

- Names in brackets after the actual fieldname describe the implied association.
 - Unless specifically stated, data values can be modified at later dates, but, the validation rules would still be applied.
 - “**Required**” options are:
 - “Mandatory” - Must be completed or filled with data.
 - “Optional” - Does not have to be completed or filled with data.
 - “Conditional” - Must be completed or filled with data when other data or validation rules are applied or initiated.
 - “Automatically Generated” - Sourced and completed or filled with the correct data by the system.
 - Unless specifically stated for a data element, editing rules are applied as the data is saved or submitted.
-

Data Fieldnames, Continued

5.2.2 Data Fieldnames Terminology

The following table lists all the Data Fieldnames in the PRIMHD NGO Web Data Entry System in strict alphabetical order.

Screen Fieldname	Meaning and/or Guide for Use
Activity End Date Time	<p>Definition: the date and time the activity ended</p> <p>Required: conditional – required as record is initially saved for all non bed-night activities</p> <p>Example value: 25-02-09 08:10</p> <p>Editing rules: must be a valid date and time combination</p> <p>Comments:</p> <ol style="list-style-type: none"> If the time is unknown, use 23:59
Activity ID	<p>Definition: the Activity ID is a unique identifier that identifies a single Activity Record for the consumer. This uniqueness applies to all PRIMHD activities – i.e. not just those submitted by this web system</p> <p>Required: automatically generated by the system as the record is saved. This unique identifier is generated by a combination of:</p> <ul style="list-style-type: none"> 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 <p>Example value: NGOWEBACT0000482</p> <p>Editing rules: Not applicable</p> <p>Comments:</p> <ol style="list-style-type: none"> As it is system generated it cannot be modified NGO’s may wish to add this ID to their own records Freeform entry on search screen is allowed
Activity Setting	<p>Definition: classification of the location where the activity took place.</p> <p>Required: mandatory</p> <p>Example value: DM – home</p> <p>Editing rules: must be a list box value</p> <p>Comments:</p>
Activity Start Date Time	<p>Definition: the date and time the activity started</p> <p>Required: mandatory</p> <p>Example value: 25-02-09 11:03:00</p> <p>Editing rules: must be a valid date and time</p> <p>Comments:</p> <ol style="list-style-type: none"> If the time is unknown, enter 00:00
Activity Type	<p>Definition: the type of MH& A service activity provided</p> <p>Required: mandatory</p> <p>Example value: T42 – face-to-face consultation</p> <p>Editing rules: must be a list box value</p> <p>Comments:</p>

Data Fieldnames, Continued

Screen Fieldname	Meaning and/or Guide for Use
Date of Birth	<p>Definition: the consumer's date of birth.</p> <p>Required: mandatory</p> <p>Example value: 27-12-1946</p> <p>Editing rules: must be a valid date and time combination</p> <p>Comments:</p> <ol style="list-style-type: none"> This date value must match the date of birth value in the NHI. If they are different then this may require a correction to the NHI record.
Date Record Last Modified	<p>Definition: The date and time this referral record was first added or last altered</p> <p>Required: automatically generated</p> <p>Example value: 25-02-09 08:04</p> <p>Editing rules: not applicable</p> <p>Comments:</p> <ol style="list-style-type: none"> if the record has not been updated, then this data is the date and time when the record was first created.
End Date Time	See Referral End Date Time or Activity End Date Time as appropriate.
Healthcare Worker CPN	<p>Definition: the HPI identifier of the responsible Healthcare worker associated with the service 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)</p> <p>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</p> <p>Example value: 94TYGR</p> <p>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.</p> <p>Comments:</p> <ol style="list-style-type: none"> Currently HPI CPNs are only being allocated to Clinical Healthcare Workers as more Health Care workers have their CPN allocated, more activities will have this value recorded

Data Fieldnames, Continued

Screen Fieldname	Meaning and/or Guide for Use
NHI Number	<p>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.</p> <p>Required: mandatory</p> <p>Example value: DFG4086</p> <p>Editing rules:</p> <ol style="list-style-type: none"> 1. must be 3 characters followed by four digits 2. when submitted to PRIMHD: <ul style="list-style-type: none"> • 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 <p>Comments:</p> <ol style="list-style-type: none"> 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
Organisation ID	<p>Definition: the Organisation identifier from the Health Practitioner Index, the HPI Organisation ID, will be used to define the organisation providing service.</p> <p>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.</p> <p>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</p> <p>Required: automatically generated by the system configured for the NGO</p> <p>Example value: G01059-E</p> <p>Editing rules: not applicable</p> <p>Comments:</p> <ol style="list-style-type: none"> 1. this is set up as the NGO's system is configured by DMS
Password	<p>Definition: user unique and password used for checking authority to access the system</p> <p>Required: mandatory</p> <p>Example value: --</p> <p>Editing rules: --</p> <p>Comments:</p> <ol style="list-style-type: none"> 1. the full rules re security of use supplied as the user is set up apply 2. the password must be at least 6 characters and is case-sensitive.

Data Fieldnames, Continued

Screen Fieldname	Meaning and/or Guide for Use
Referral End Code	<p>Definition: the reason the referral ended</p> <p>Required: conditional – must be supplied whenever the Referral To and the Referral End Date are supplied</p> <p>Example value: DR – Ended Routinely</p> <p>Editing rules: must be a list box value</p> <p>Comments:</p>
Referral End Date Time	<p>Definition: the date (and time) a referral ends.</p> <p>Required: conditional – must be supplied whenever the Referral To and the Referral End Code are supplied</p> <p>Example value: 25-02-09 08:23</p> <p>Editing rules: Must be a valid date and time combination</p> <p>Comments:</p> <ol style="list-style-type: none"> 1. if the time is unknown, use 23:59
Referral From	<p>Definition: the referral source</p> <p>Required: mandatory</p> <p>Example value: GP</p> <p>Editing rules: must be a list box value</p> <p>Comments:</p>
Referral ID	<p>Definition: the Referral ID is a unique identifier that identifies a consumer's referral record. This uniqueness applies to all PRIMHD referrals – i.e. not just those submitted by this web system.</p> <p>Required: automatically generated by the system as the record is saved. This unique identifier is generated by a combination of:</p> <ul style="list-style-type: none"> • 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 <p>Example value: NGOWEBREF0000145</p> <p>Editing rules: not applicable</p> <p>Comments:</p> <ol style="list-style-type: none"> 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	<p>Definition: the date (and time) the referral started</p> <p>Required: mandatory</p> <p>Example value: 25-02-09 11:01</p> <p>Editing rules: must be a valid date and time</p> <p>Comments:</p> <ol style="list-style-type: none"> 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

Data Fieldnames, Continued

Screen Fieldname	Meaning and/or Guide for Use
Referral To	<p>Definition: records where the consumer is referred to.</p> <p>Required: conditional – must be supplied whenever the Referral End Code and the Referral End Date are supplied</p> <p>Example value: NR – No further referral</p> <p>Editing rules: must be a list box value</p> <p>Comments:</p>
Sex	<p>Definition: the consumer's sex</p> <p>Required: mandatory</p> <p>Example value: F – Female</p> <p>Editing rules:</p> <ol style="list-style-type: none"> 1. must be a value in the drop-down list 2. must match the NHI value <p>Comments:</p> <ol style="list-style-type: none"> 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	<p>Definition: the code for the NGO's team that the user is entering the referral and activity data</p> <p>Required: mandatory</p> <p>Example value: 7316</p> <p>Editing rules: the team code must be one of the codes allocated to the organisation</p> <p>Comments:</p> <ol style="list-style-type: none"> 1. team code records are managed by Data Management Services National Collections Team
To Be Deleted	<p>Definition: A “yes” in this field shows this activity will be deleted when the referral is next submitted.</p> <p>Required: Set when an activity is being edited and [Delete] is clicked</p> <p>Example value: “Yes” appears if record is to be deleted</p> <p>Editing rules: When the delete key is pressed, confirmation that the delete is required is requested.</p> <p>Comments:</p> <ol style="list-style-type: none"> 1. A confirmed delete request cannot be reversed. 2. A ‘reversal’ can be achieved by re-entering the details.
User ID	<p>Definition: user's identification code entered as they logon.</p> <p>Required: mandatory</p> <p>Example value: MALTILDA</p> <p>Editing rules: verified with password by system security.</p> <p>Comments:</p> <ol style="list-style-type: none"> 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. 3. the organisation must also request the removal of the access authority for all users that leave.

5.3

Glossary

Glossary Terminology

The following table lists all the Glossary Terms and Meanings as used and understood for use in the PRIMHD NGO Web Data Entry System.

Term	Meaning
Activity	<p>PRIMHD describes all Mental Health & Addiction services provided to a consumer as an 'Activity'.</p> <p>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 via audio-visual links. An activity may also include support services, such as assistance with housing or employment.</p> <p>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.</p> <p>Activity information collected relates to:</p> <ol style="list-style-type: none"> 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 <p>Activities set in outpatient clinics or within the community are generally measured in terms of contacts with the consumer.</p> <p>For 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".</p> <p>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</p>
Collection	A national set of information and data, to a specific part of the health sector. 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.
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.

Glossary, Continued

Term	Meaning
NHI	<p>The National Health Index assigns unique identifiers to all health consumers. Other more common references to the consumer or patient are Healthcare User or Client.</p> <p>Each Client in PRIMHD has a unique coded identifier called the NHI Number. The NHI Number is used so that clinical information can be shared between Health Providers and Clinicians, who are caring for the same client, by protecting their privacy without using the Client's name and other personal details.</p>
PRIMHD	<p>Programme for the Integration of Mental Health Data.</p> <p>PRIMHD is pronounced as "primed".</p>
Referral	<p>The Referral, also known as the Referral-Discharge, can be a:</p> <ol style="list-style-type: none"> request for management of a problem or provision of a service, e.g. a request for an investigation, intervention or treatment; 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. <p>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.</p> <p>The request can be made by:</p> <ol style="list-style-type: none"> the consumer or their family, whānau, or other significant person, or from one team to another. In this case the requesting team may or may not transfer responsibility via another agency. <p>All these requests shall be recorded as a new referral. To ensure information on unmet demand is not lost, declined requests must also be recorded.</p> <p>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.</p> <p>A referral must be closed when the team is no longer providing services to the consumer.</p> <p>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.</p> <p>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.</p>
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 Information

6.1 Introduction

Prerequisites for this document are for the reader to

- have their user log on details set-up, and
 - completed training
-

6.2 Changing Personal User 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.

See section 1.6 Getting Help for contact details for this process.

6.3 Getting Reports

Although this system is for data entry, you can get one-off and /or regular reports on your data that is held in PRIMHD. Please email data-enquiries@moh.govt.nz to initiate a request.

6.4 PC and Browser Setup Support

The Ministry of Health does not provide support for any local PC, browser or other local technical problems (eg. PC start-up, Printing difficulties, Internet service problems, local applications software or operating system software problems).

If you have any local support needs please contact your usual PC support agent, Technical programming help desk, or Internet service provider for assistance.

6.5 System Timeout

The system has a "Timeout" function, which logs a user out after fifteen minutes without activity. Any record currently being edited/added will be discarded if it has not been saved or submitted when the "Timeout" function activates and terminates the user's session.

If a user's session is terminated the user will have to restart their browser before attempting to log in to the system again.

7. Appendix

7.1 Appendix A – Change/Update Register

This page and the following table is intentionally blank for future use as a Change/Update Register.

Date	Section	Change/Update Description
00/00/00	0.0.0	Xxxxxxxxxxxx
