

Programme for the Integration of Mental Health Data

# Training manual for NGOs using the Web Data Entry System



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- Usability

# **Document Control**

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Purpose	This document describes how to use PRIMHD NGO Web Data Entry System to send data to the Ministry of Health.
When to use this document	When the software has been installed, this document will be used as part of NGO training and for future reference.
Who uses this document?	NGOs who are using the PRIMHD Web Data Entry System.
Supplementary materials (technical)	NGO Web Data Entry System user manual.
Contacts for PRIMHD	Tony Griffiths (04) 816-2848 For technical support: 0800 505 125 or email: primhduserinterface@moh.govt.nz www2.nzhis.govt.nz/primhd/primhd.html

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## 1. Accessing The PRIMHD Website

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 screen and press the **Enter** key on the keyboard. This will take you to the PRIMHD site (the log in page).

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

File Edic View	Pavontes Tools Help	
Back - 6	Add to Favorites	D.
G back + G	Organize Favorites	1
Address 🕘 https:/,	🛅 Links	•
	ThinkPad Recommended Sites	эЦ
	🕘 Login - PRIMHD	- 11

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

<u>B</u> ookmarks	<u>T</u> ools	<u>H</u> elp	0	
<u>B</u> ookmark	This Pa	ge	Ctrl+D	
<u>M</u> anage B	3ookmarl	ട	N	ars.net

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.

## 2. Log In Instructions

To log in to the PRIMHD system, click in the **Username** 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.

	amme for the Integration of Mental Health Data
For technical support pleas	e call 0800 505 125. For all other enquiries please contact <u>Support</u>
Username	
Password	Login Forgot Password

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

User ami_2's password has expired Change password for ami_2			
<ul> <li>Input old password</li> <li>Input new password</li> <li>Confirm new password</li> </ul>			
Change Password			

Enter your old password and your new password and then reconfirm your new password and 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.

## 3. Referrals

Once in the system, your starting point will be the Referrals section (notice the tab at the top of the screen is shaded). 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.

P	<b>WHD</b> Programme for the Integration of Mental H	lealth Data
For	technical support please call 0800 505 125. For all other enquiries please o	contact <u>Support</u>
Referrals	My Error Records	
Search Referra	ls	
Referral ID		
Organisation ID	G00049-B	
Team Code		
NHI Number		
Referral Start Date	For example 26-10-2008	
	Search Clear Cancel New	

This screen enables you to complete all of the fields for a new referral (see page 9) or just a few fields if you wish to search for an existing referral (see page 11).

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

<sup>III</sup> icon. A calendar showing the current month and year will appear.

	March	*	] [	<b>&lt;</b> 2	009	>
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 <sup>III</sup> icon

You can use the drop down arrow to change the month or the left and right arrow to change the year. To select a date click on it, it will then insert the date into the start referral field and close the calendar.

### 4. Adding New Referrals

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.

Referrals	My Error Records	
Add a New Re	eferral	
Referral ID		į
Organisation ID	G00049-B	
Team Code	**	
NHI Number	**	
Sex	<b>**</b>	
Date of Birth	🖾 ** For example 26-10-2008	
Referral From	**	
Referral To		
Referral End Code	×	
Start Date Time		
End Date Time		
	** indicates mandatory fields	
	Save Reset Cancel Submit for Processing	

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

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:

Referrals My	Error Records
Add a New Refer	ral
Referral ID	
Organisation ID	G00049-B
Team Code	Field Team Code is required
NHI Number	Field NHI Number is required
Sex	Field Sex is required
Date of Birth	🖙 ** For example 26-10-2008
Referral From	Field Referral From is required
Referral To	
Referral End Code	
Start Date Time	Field Start Date Time is required Field Start Date Time Hours is required Field Start Date Time Minutes is required
End Date Time	
	** indicates mandatory fields
	Save Reset Cancel Submit for Processing

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

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

The new Activity form will appear below the referral form (see page 15 for steps on how to complete this form).

Add New Activity	
Activity ID	
Activity Type	•
Activity Setting	× *
Health Care Worker CPN	
Start Date Time	
End Date Time	
	** indicates mandatory fields
	Save Reset Cancel

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.

## 5. Existing Referrals

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

	Р <b>К</b> МН	DProgram	me for the li	ntegration of	f Mental Health D	Data		
	For technical support please call 0800 505 125. For all other enquiries please contact <u>Support</u>							
	Referrals	Error Records						
Sea	rch Referrals							
Refer	ral ID							
Orgai	nisation ID	G00049-B						
Team	i Code							
NHEN	lumber							
Refer	ral Start Date							
		Search	Clear Cano					
Refe	rral Search Result							
	Referral ID 🔺		Team Code	NHI Number	Referral Start Date	Referral Er Date		
	Relefiand					Dato		
	REFMOHEW0120	00063	7289	ABA7402	05-08-2008	Duto		
0			7289 7289	ABA7402 MSG1234	05-08-2008 01-04-2009			

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

From this screen you can modify the existing Referrals by following the instructions on page 12 or adding an activity by following the instructions on page 15

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.

## 6. Editing Referrals

By clicking on an individual Referral ID, the completed form will open

Referrals	y Error Records
View Referral	
Referral ID	NGOWEBREF000002425
Organisation ID	G00049-B
Team Code	7289
Deleted Flag	
NHI Number	MSG1234
Sex	F
Date of Birth	11-10-1964
Referral From	NA
Referral To	0.022
Referral End Code	
Start Date Time	01-04-2009 10:00
End Date Time	
Date Record Last Modified	27-04-2009 15:02
Date Record Last Modified	
	Edit Delete Cancel

Click the **Edit** button to take you to the form to edit the data.

PR	<b>HD</b> Programme for the Integration of Mental Health Data
For technica	l support please call 0800 505 125. For all other enquiries please contact <u>Support</u>
Referrals	Error Records
Edit Referral	
Referral ID	NGOWEBREF000002425
Organisation ID	G00049-B
Team Code	7289 **
NHI Number	MSG1234 **
Sex	Female 💌 💀
Date of Birth	11-10-1964 💷 ** For example 26-10-2008
Referral From	(NA) Needs assessment and co-ordination service 💉 😖
Referral To	×
Referral End Code	×
Start Date Time	01-04-2009 🗊 10 : 00 **
End Date Time	
	** indicates mandatory fields
	Save Cancel Submit for Processing

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

## 7. Deleting Referrals

To delete a Referral with its associated activities, click on the **Delete** button.

or Records COWEBREF000002425 0049-B 89
0049-B
0049-B
0049-B
89
:G1234
-10-1974
-04-2009 10:00
-04-2009.15:30
-04-2009 15:30 dit Delete Cancel

A warning message will appea	ar asking for confirmation.	Microsoft Internet Explorer
		Are you sure you wish to delete this Referral record?
		OK Cancel
РЕМН	DProgramme for the Integration of N	Nental Health Data
For technical supp	ort please call 0800 505 125. For all other enquirie	es please contact <u>Support</u>
Referrals	y Error Records	
Referral Accepte		
	BREF000002425 has been successfully sul	bmitted and accepted by the
Referral Details		
Referral ID	NGOWEBREF000002425	
Organisation ID Team Code	G00049-B 7289	
Deleted Flag	DELETED	
NHI Number	MSG1234	The word DELETED
Sex	F	appears as well as
Date of Birth Referral From	11-10-1974 NA	date and time the
Referral To	NA	record was modified.
Referral End Code		
Start Date Time	01-04-2009 10:00	
End Date Time		
Date Record Last Modified	27-04-2009 15:34	

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

## 8. Activities

Г

To search for existing activities from the Referrals screen (see page 11) click on the appropriate Referral and if there are Activities they will be listed:

Referrals	Error Record	ls						
View Referral								
Referral ID	REFMOHEV	V012000063	1					
Organisation ID	G00049-B	G00049-B						
Team Code	7289	7289						
Deleted Flag								
NHI Number	ABA7402							
Sex	F							
Date of Birth	27-12-1972							
Referral From	AD							
Referral To								
Referral End Code		00.2000.00.00						
Start Date Time	05-08-2008	5-08-2008 00:00						
End Date Time								
Date Record Last Modified	21-01-2008	1-01-2008 00:00						
	Edit D	elete Ca	ancel					
Activities								
Activity ID 🔺	Activity	Activity	Health Care	Start Date	End Date Time	То Ве		
Activity to _	Туре	Setting	Worker CPN	Time	End Date Time	Deleted		
ACTMOHEW01200006	3 TO9	СМ		05-08-2008 00:00	05-08-2008 00:00			
1 records found, displaying	1 records, f	rom 1 to 1.	Page 1 of 1					

## 9. Adding New Activities

To add a new Activity after you have entered and saved the new Referral details or found a specific (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. If there are multiple activities to add, this will put the forms into a temporary holding 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.

End Date Time	Image: Save Cancel Submit for Processing	
Add New Activit	у	
Activity ID		
Activity Type	AA	
Activity Setting	**	
Health Care Worker CPN		
Start Date Time		
End Date Time		
	** indicates mandatory fields Save Reset Cancel	
		]

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 beep clicked and further validation happens when the **Submit for Processing** button is clicked.

If there are any errors within your data, error messages will show up with a red explanatory note. See page 18 on how to correct your errors.

Add New Activi	ty
Activity ID	
Activity Type	** Field Activity Type is required
Activity Setting	Field Activity Setting is required
Health Care Worker CPN	
Start Date Time	Field Start Date Time is required Field Start Date Time Hours is required Field Start Date Time Minutes is required
End Date Time	
	** indicates mandatory fields
	Save Reset Cancel

Activity ID	ACTMOHEW012000063
Activity Type	(T09) Early psychosis intervention attendances
	**
Activity Setting	(CM) Community 💉 💀
Health Care Worker CPN	
Start Date Time	05-08-2008 🗊 00 : 00 **
End Date Time	05-08-2008
	** indicates mandatory fields
	Save Delete Cancel

If you need to edit any Activity, click on the appropriate Activity ID and the edit form will open.

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 **Delete** button will delete this Activity (see the next section on Deleting activities).

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

## **11. Deleting Activities**

You can delete an Activity by clicking on the **Delete** button. This warning screen will appear:



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

		Activity	Activity	Health Care			То Ве
	Activity ID	Туре	Setting	Worker CPN	Start Date Time	End Date Time	Deleted
0	NGOWEBACT000002601	T21	СМ		05-04-2009 10:00		Yes
	ACTMOHEW012000063	т09	СМ		05-08-2008 00:00	05-08-2008 00:00	

## 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



Click on any of the Referral IDs to take you to a screen showing the errors.

Referrals My E	Error Records		
	montecordo		
Record ID	Error Reference	Error Title	Error Message
	i -		The Event HCU ID supplied in the HC record is
NGOWEBREF000002447	RM-P22-06	Invalid Data	not valid in the NHI Database.

Click on the **Edit Referral** link to open up the Referral details screen. Click on the **Edit** button and then edit the erroneous data. (see page 12 for how to edit the data)

## 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:





# **APPENDIX A – Troubleshooting**

Problem	Suggested resolution
Incorrect password entered	Ensure the CAPSLOCK key is not switched on and try to enter your password again Contact the system administrator
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 one hour, it will time out and any data on screen will not be saved. This error message will appear: User Session Expired To reconnect click the Reload button on the browser or click the button below Reload
Cannot get to the login page	Check that your internet connection is still working and if in doubt, contact your Internet Service Provider

## **APPENDIX B – Glossary**

A more comprehensive system description is contained in the document NGO Web Data Entry User Manual

Please refer to the Health Information Standards Organisation (HISO) data set for further PRIMHD terminology.

Term	Meaning		
Activity	PRIMHD describes all service provision to a <b>consumer (</b> recipient) as an 'Activity'.		
	As the person using this system saves a record, an <i>Activity ID</i> is automatically allocated. Each activity is associated with its relevant <b>referral</b> by use of the <i>Referral ID</i> .		
NGO	Non-Government Organisation.		
NHI	The National Health Index which has a unique lifetime identifier for each <b>consumer.</b>		
PRIMHD	Programme for the Integration of Mental Health Data.		
Consumer	The consumer of Ministry funded health care. The consumer is also known as a patient or recipient.		
	Each consumer has a unique code called an <b>NHI</b> number		
Referral	The Referral, also known as the Referral-Discharge can be a request for management of a problem or provision of a service, e.g. a request for an investigation, intervention or treatment.		
	A referral must be closed when the <b>team</b> is no longer providing services to the <b>recipient</b> .		
	The PRIMHD Referral Discharge ID (Referral ID) is a unique identifier that identifies a Referral Discharge for a <b>recipient</b> and is the primary key that links the relevant <b>activities</b> .		
	As the person using this system saves a record, a <b>Referral ID</b> is automatically allocated. Each activity is associated with its relevant <b>referral</b> by use of the <b>Referral ID</b> .		
Team	A team/Health Care worker that provides mental health and addiction services within a service provider eg NGO, DHB, PCP, PHO, other community agencies.		

NOTES: