Training manual for NGOs using the Web Data Entry System

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- Completeness
- 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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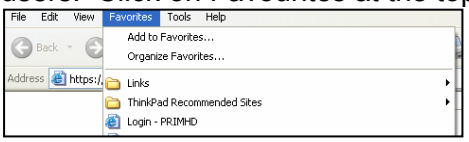
1. Accessing The PRIMHD Website

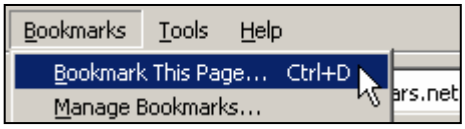
To access the PRIMHD website easily, it should be listed as a favourite or bookmark which can be accessed from the toolbar.

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**.

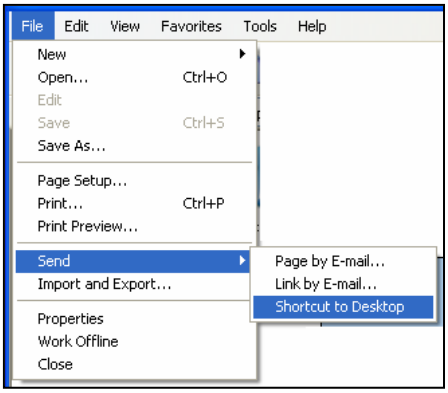


Firefox users: Click on Bookmarks at the top of the screen and choose **Bookmark This Page**



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

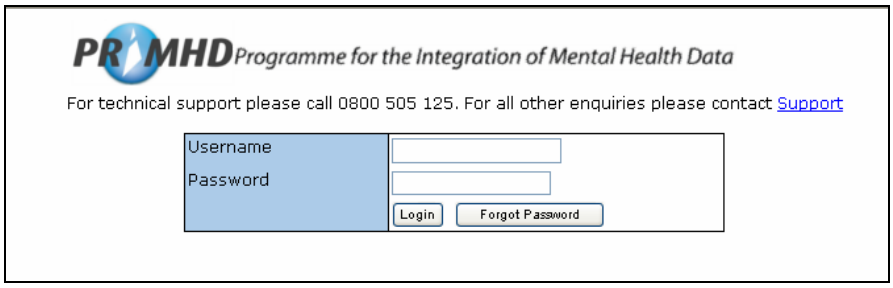


The shortcut icon will then appear on your desktop looking like this:

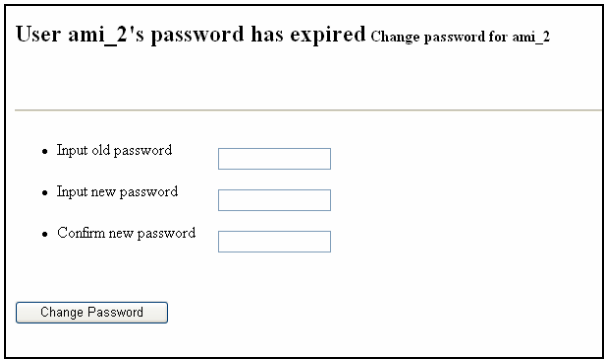
You can then use this shortcut to easily access the site in the future.

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.



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



Enter your old password and your new password and then reconfirm your new password and click the **Change Password** button. You will then be taken to the Search Referral screen.

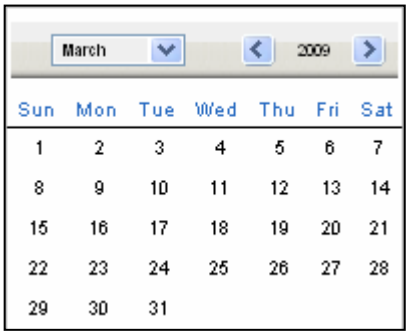
NOTE: The **Forgot Password** feature is not currently accessible in this product release.

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.

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

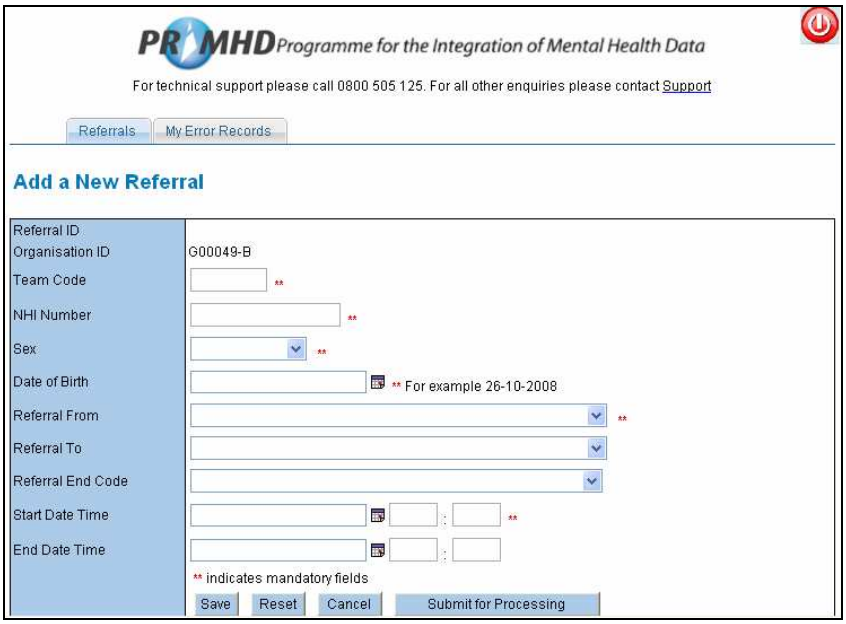


Note that there are several places on different screens where this calendar can be accessed from the icon

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.

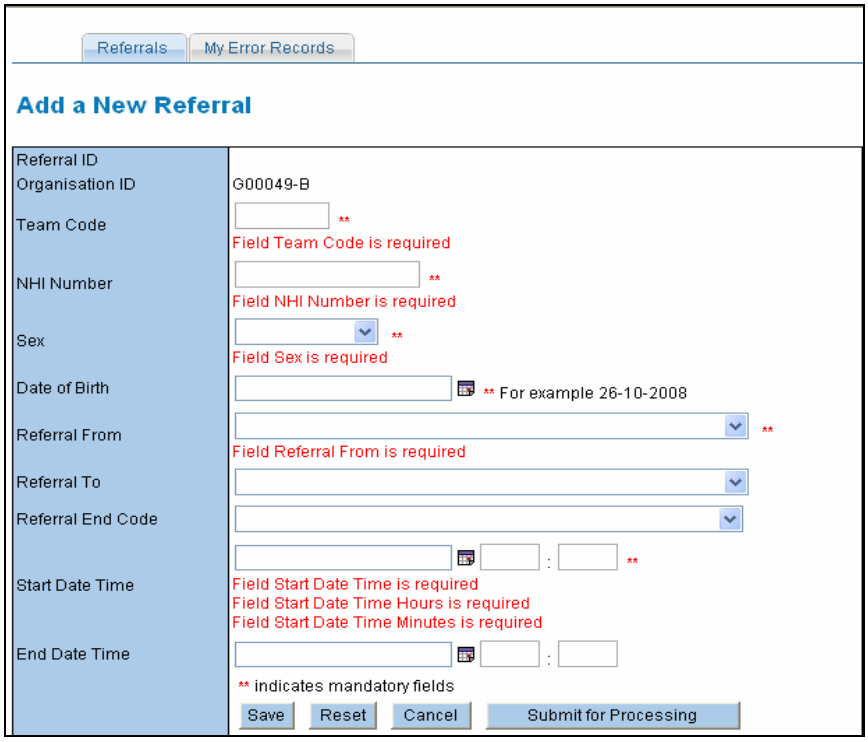
4. Adding New Referrals

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.



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:

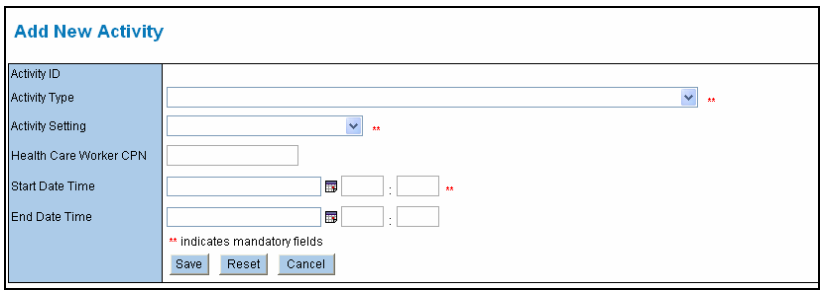


Continued on next page

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).

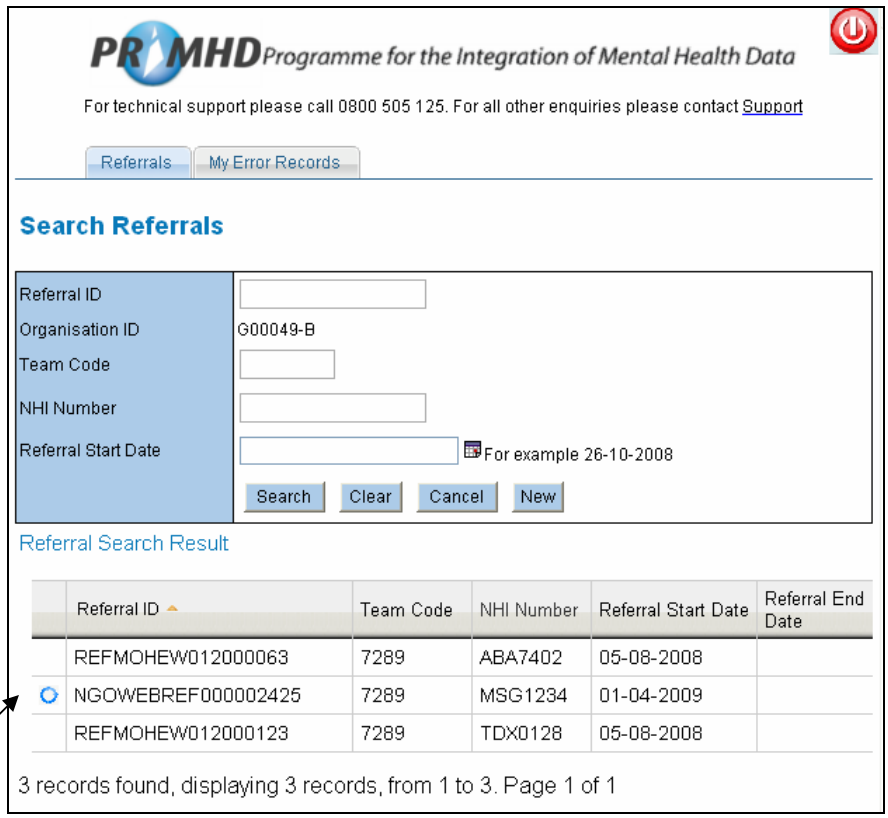


The **Reset** button enables you to clear all the data that you have just entered in the form.

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**



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.

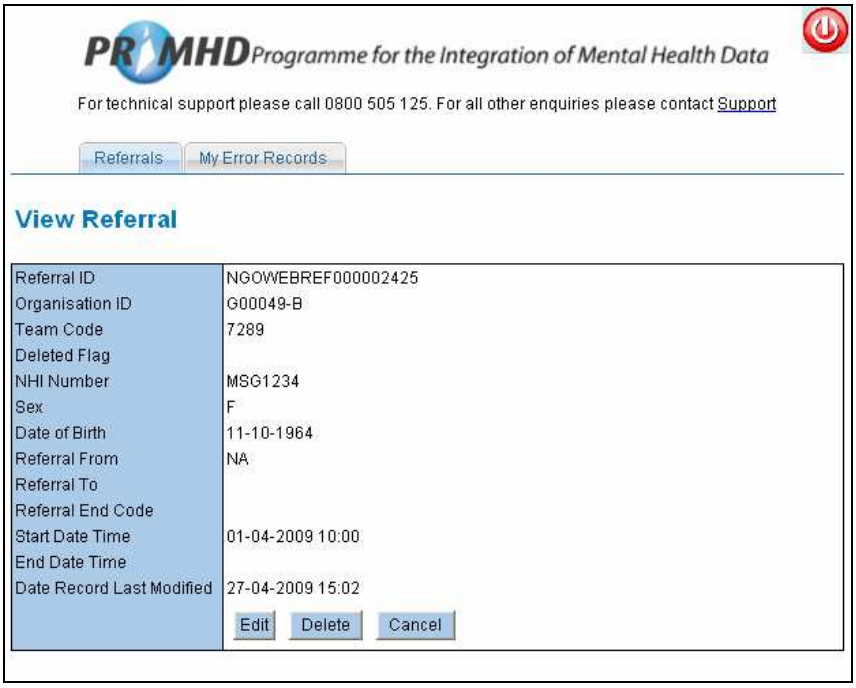
From this screen you can modify the existing Referrals by following the instructions on page 12 or adding an activity by following the instructions on page 15

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

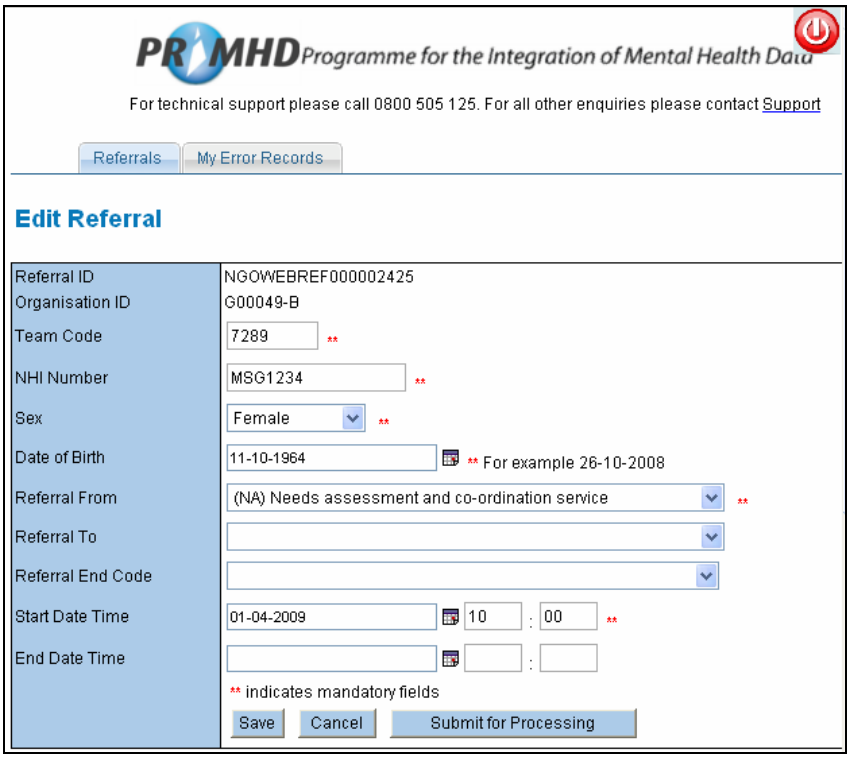
The **Cancel** button will remove your search results display.

6. Editing Referrals

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



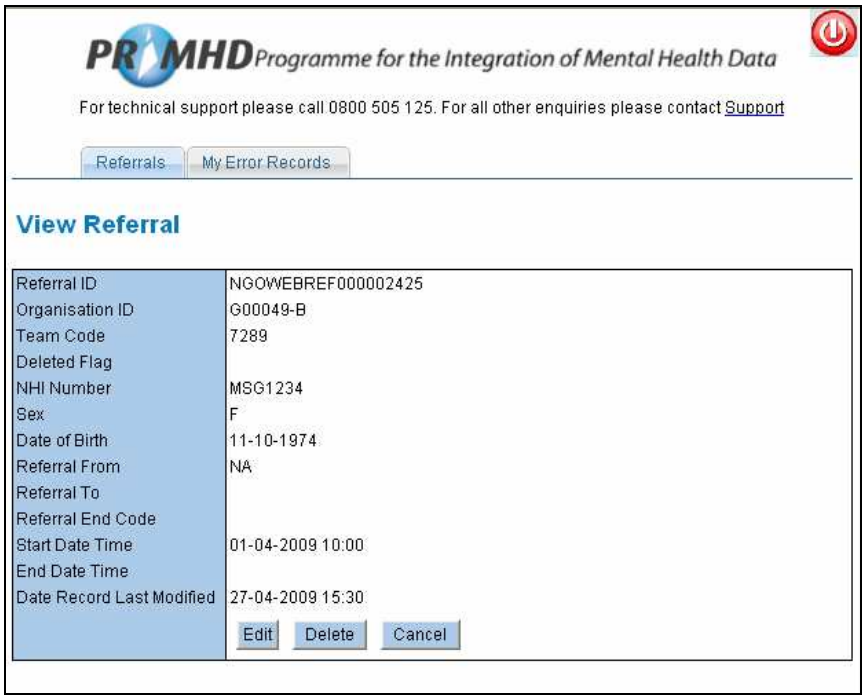
Click the **Edit** button to take you to the form to edit the data.



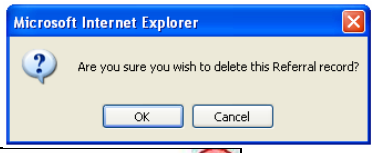
When you are ready to submit the edited Referral details, then click the **Submit for Processing** button, otherwise, just click the **Save** button if you wish to continue adding activities.

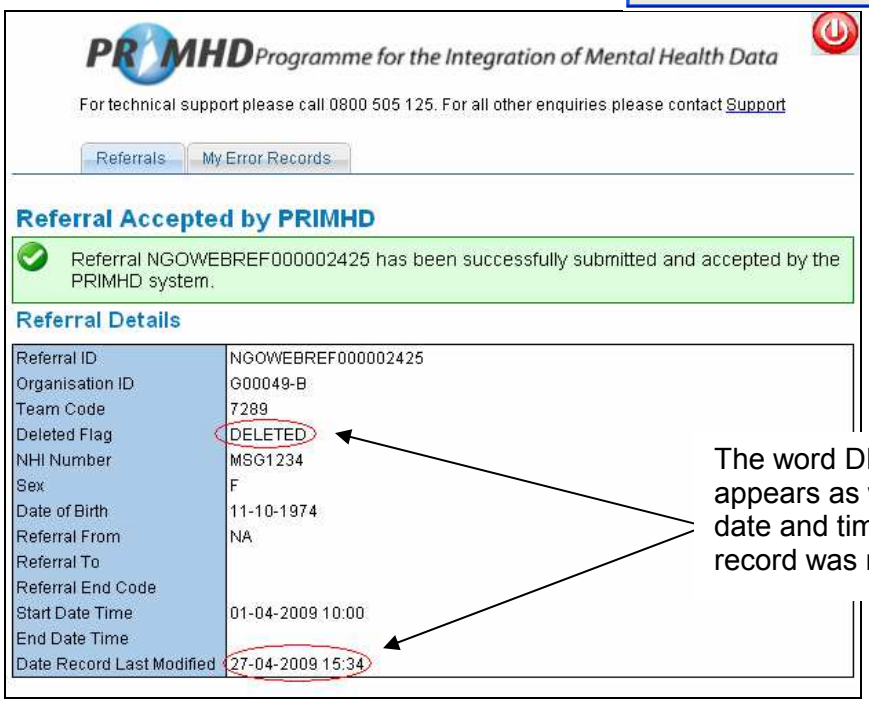
7. Deleting Referrals

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



A warning message will appear asking for confirmation.



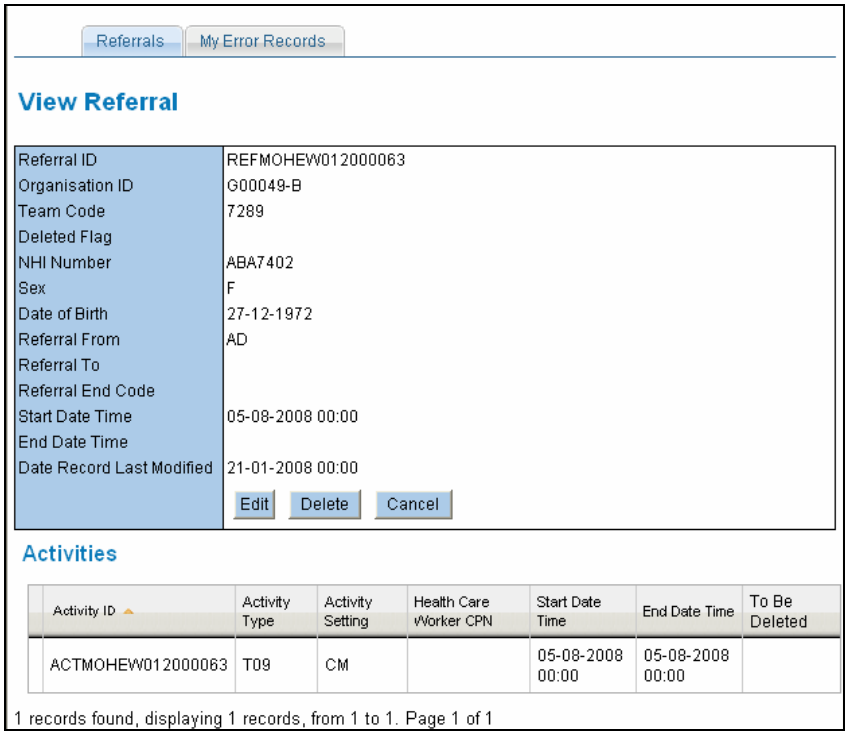


The word DELETED appears as well as date and time the record was modified.

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

8. Activities

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 | My Error Records

View Referral

Referral ID	REFMOHEW012000063
Organisation ID	G00049-B
Team Code	7289
Deleted Flag	
NHI Number	ABA7402
Sex	F
Date of Birth	27-12-1972
Referral From	AD
Referral To	
Referral End Code	
Start Date Time	05-08-2008 00:00
End Date Time	
Date Record Last Modified	21-01-2008 00:00

Edit Delete Cancel

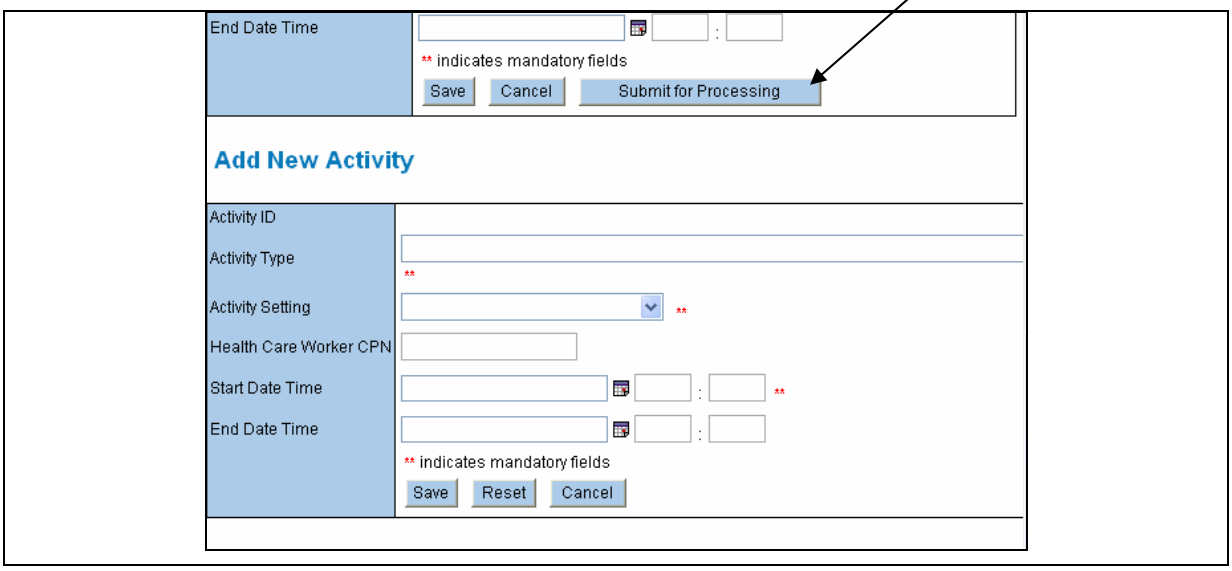
Activities

Activity ID	Activity Type	Activity Setting	Health Care Worker CPN	Start Date Time	End Date Time	To Be Deleted
ACTMOHEW012000063	T09	CM		05-08-2008 00:00	05-08-2008 00:00	

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

9. Adding New Activities

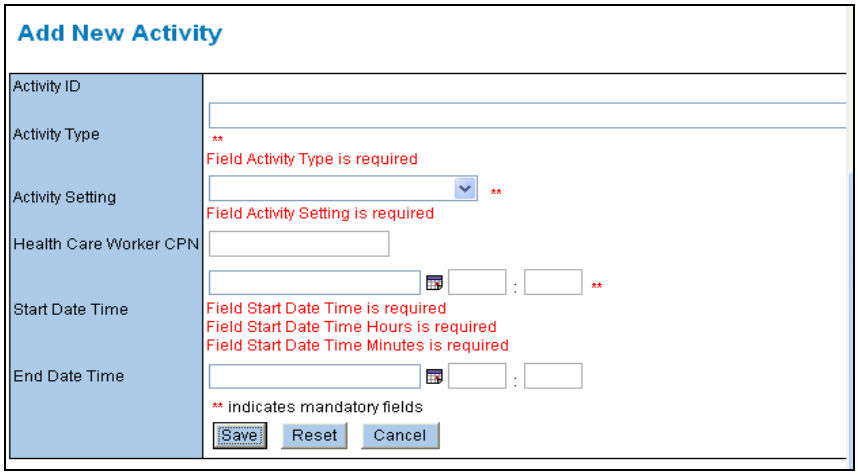
To add a new Activity after you have entered and saved the new Referral details or found a specific (existing) Referral, click the **Edit** button and scroll down to the **Add a New Activity** form below. Enter all the details in this form and then click the **Save** button. If there are multiple activities 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.



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

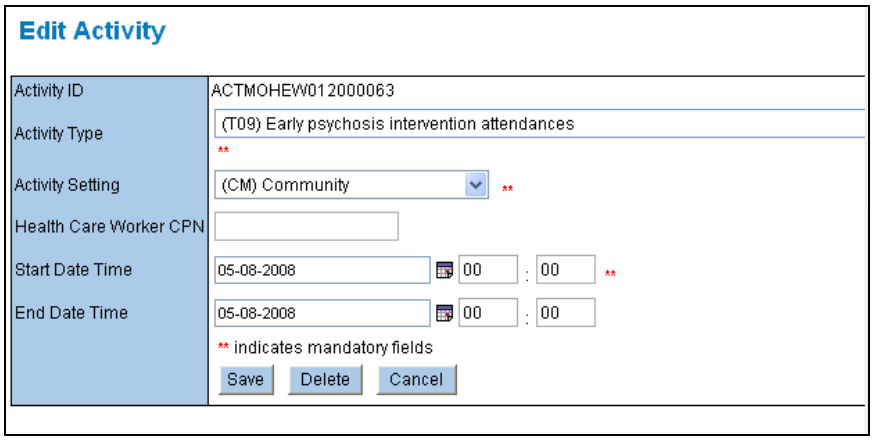
NOTE: Some validation happens after the **Save** button has beep clicked and further validation happens when the **Submit for Processing** button is clicked.

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.



10. Editing Activities

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



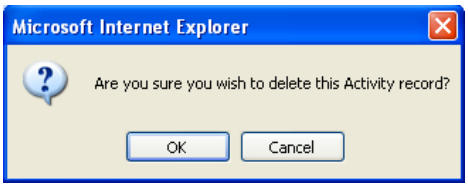
Make any appropriate changes and then click the **Save** button. This will put the form into a temporary holding database until you are ready to submit. When you are ready, click the **Submit for Processing** button higher up in the referral section.

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

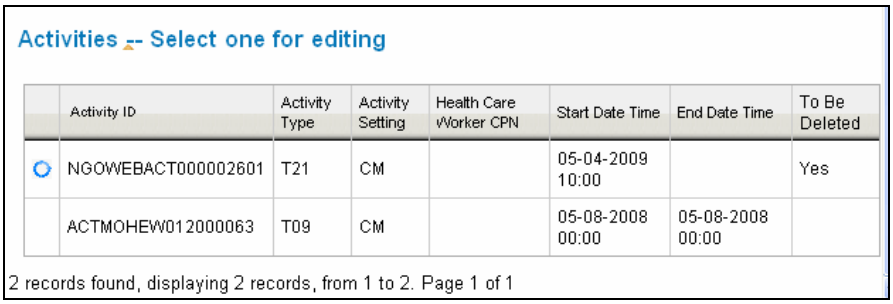
The **Cancel** button will clear this form of any data you have just entered, and take you back to the previous screen.

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:



Activities -- Select one for editing

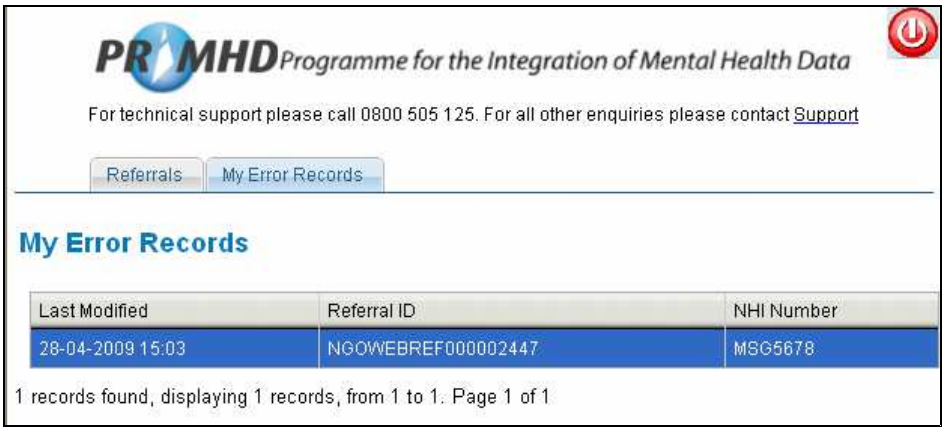
	Activity ID	Activity Type	Activity Setting	Health Care Worker CPN	Start Date Time	End Date Time	To Be Deleted
	NGOWEBACT000002601	T21	CM		05-04-2009 10:00		Yes
	ACTMOHEW012000063	T09	CM		05-08-2008 00:00	05-08-2008 00:00	

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

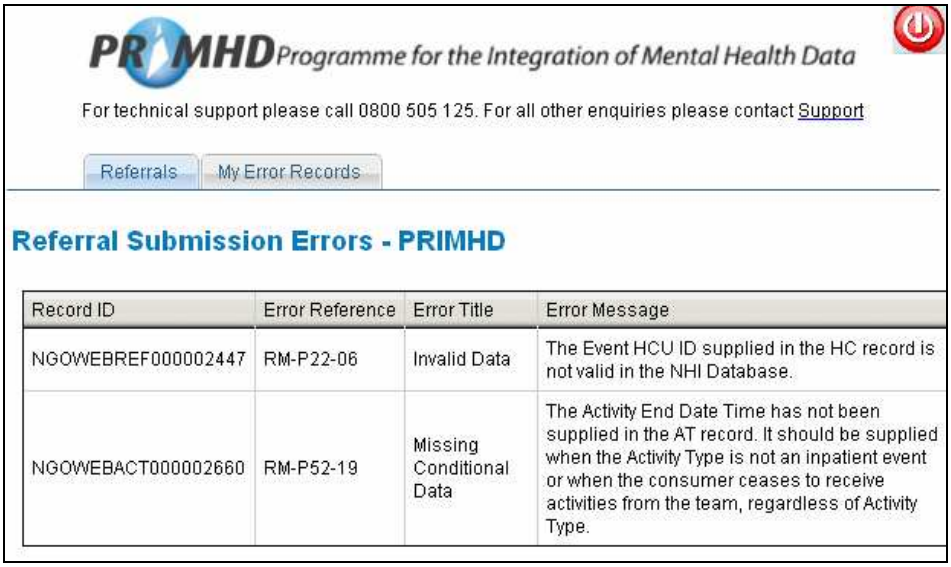
12. My Error Records

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



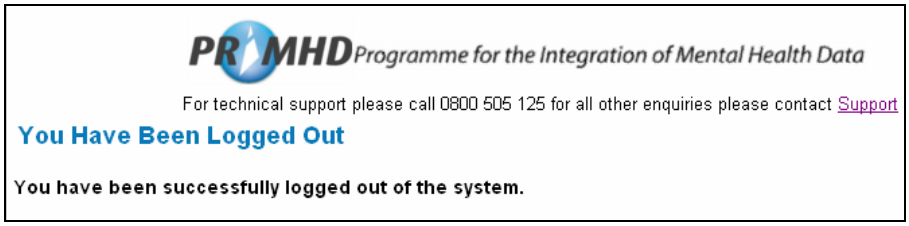
Click on any of the Referral IDs to take you to a screen showing the errors.



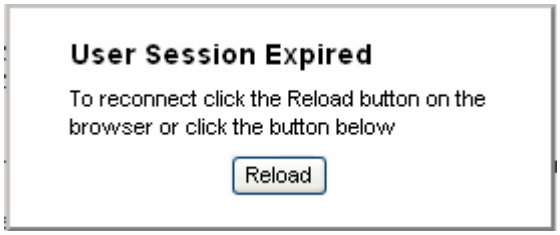
Click on the **Edit Referral** link to open up the Referral details screen. Click on the **Edit** button and then edit the erroneous data. (see page 12 for how to edit the data)

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: 
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 **consumer (**recipient) as an 'Activity'. As the person using this system saves a record, an ***Activity ID*** is automatically allocated. Each activity is associated with its relevant **referral** by use of the ***Referral ID***.
NGO	Non-Government Organisation.
NHI	The National Health Index which has a unique lifetime identifier for each **consumer.**
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 **NHI** 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 **team** is no longer providing services to the **recipient**. The PRIMHD Referral Discharge ID (Referral ID) is a unique identifier that identifies a Referral Discharge for a **recipient** and is the primary key that links the relevant **activities**. As the person using this system saves a record, a ***Referral ID*** is automatically allocated. Each activity is associated with its relevant **referral** by use of the ***Referral ID***.
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: