

My Practice

To set up a new patient

Press the 'New' button at the top of the tool bar

A screenshot of the 'My Practice' software interface showing the 'Patient Details - Christine Test' form. The form is divided into several sections: 'Personal Details', 'Addresses', 'Contacts', 'Chart', 'Schemes', 'Relationships', and 'Family Members'. The 'Personal Details' section includes fields for Surname (Test), First Names (Christine), Date of Birth (09/11/1958), Status (Not Specified), and Language (English). The 'Addresses' section shows a home address: 12 Brookfield St, St Heliers, Auckland. The 'Contacts' section shows a table with columns for Method, Contact Number, Note, Preferred, Statem, and Recall. The 'Chart' section includes fields for Preferred (Marcus Welby), Type (Regular), Reg. (24/09/2001), Last Seen (19/01/2016), and NHI (ABC1235). The 'Schemes' section has a table with columns for Type, Start, Expiry, and Reference. The 'Relationships' section has a table with columns for Relationship, With, and Notes. The 'Family Members' section has a table with columns for Family to join, Leave, Add Member, and Go to. The 'Actions' panel on the right lists various actions such as Clinical Notes, Accounts, Post It Note, Appointment His..., Change Log, Labels - Single, Labels - Page, Document, New Family Me..., Update Family, Check for Duplic..., Merge Record, Delete this Patient, Portal Registrati..., Add Task, Check NHI, and Get Enrolment. The 'Notes' section shows a note: 'Reqd visit frequency = 6'. The 'Map' button is also visible.

Complete the details as prompted.

Areas marked with red exclamation marks must be completed whenever possible.

Yellow areas will present a drop-down list once you start typing in them.

Orange coloured fields (for example Account Holder), will bring up a search window when you enter text and press [Enter]

Finding a patient on NHI

If no NHI is present, you will be presented with a 'search and match screen'

- Find the patient
- Or Add a new patient on the NHI system

When this screen opens, you may see a list of potential matches

1. If no suitable match is displayed, you can try changing the search criteria then [Search] again
2. Select a likely candidate and proceed to [Compare] the details with your data
3. If no suitable candidate exists, click [Add to NHI] to create a new Patient on the NHI system

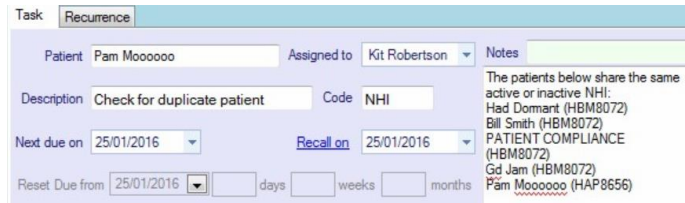
Note:

- There are some minimum data elements required for a search to proceed
- The list is ordered by the Match score (the most likely match is at the top)
- Take extra care when there are similar match scores
- For newborns, remember to try "Baby of..." in your search

Check for possible duplicates

When 'Finding patients on the NHI', we will check for possible duplicate records within My Practice.

- We will display patients with the same NHI or any of the dormant NHI numbers (old deprecated numbers)
- We will create a task to remind your staff to check and merge these duplicates



Task: Recurrence

Patient: Pam Moooooo Assigned to: Kit Robertson

Description: Check for duplicate patient Code: NHI

Next due on: 25/01/2016 Recall on: 25/01/2016

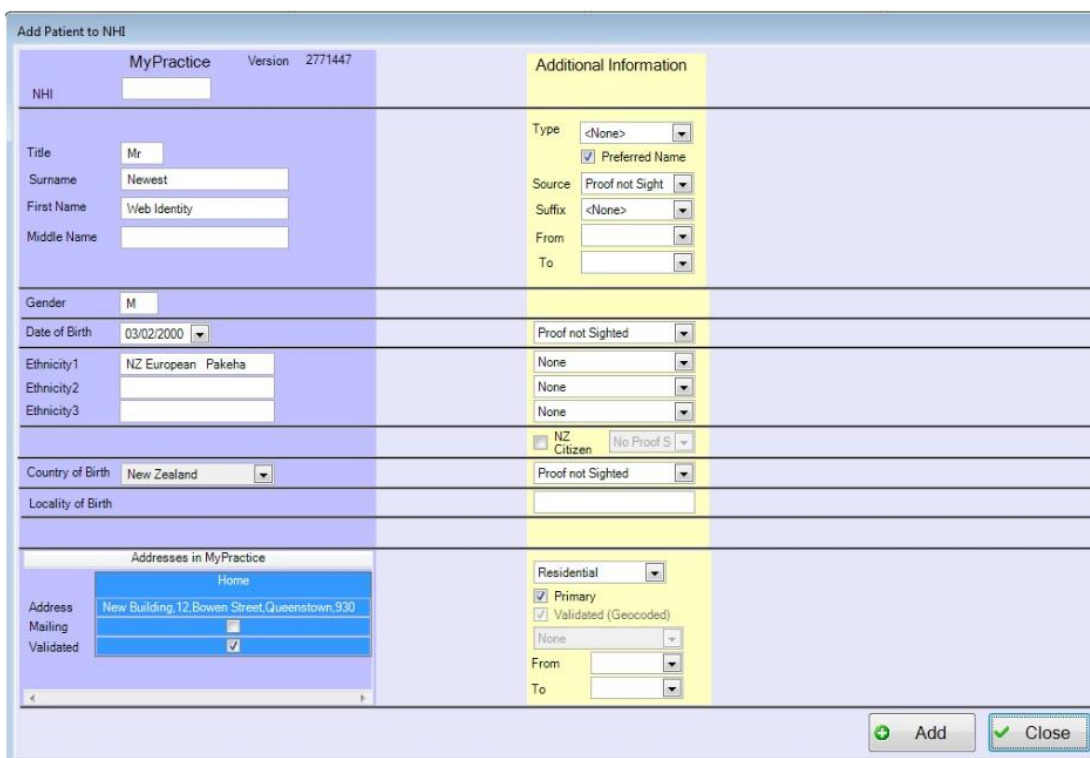
Reset Due from: 25/01/2016 days weeks months

Notes: The patients below share the same active or inactive NHI:
Had Dormant (HBM8072)
Bill Smith (HBM8072)
PATIENT COMPLIANCE (HBM8072)
Gd Jam (HBM8072)
Pam Moooooo (HAP8656)

Add a patient to the NHI system

Add as much patient information to the NHI as possible. The minimum information required is:

- A Given name and Family name
- A Primary residential address – validated and a physical address (not a PO Box)
- Date of birth (no proof sighted)
- Gender
- Ethnicity
- NZ Citizenship (proof not sighted)



MyPractice Version 2771447

NHI: [Empty]

Title: Mr Surname: Newest First Name: Web Identity Middle Name: [Empty]

Gender: M Date of Birth: 03/02/2000

Ethnicity1: NZ European Pakeha Ethnicity2: [Empty] Ethnicity3: [Empty]

Country of Birth: New Zealand Locality of Birth: [Empty]

Addresses in MyPractice: Home: New Building, 12, Bowen Street, Queenstown, 930 Mailing: [Empty] Validated: [Checked]

Additional Information: Type: <None> Preferred Name: [Checked] Source: Proof not Sight Suffix: <None> From: [Empty] To: [Empty]

Proof not Sighted: [Empty]

NZ Citizen: [Checked] No Proof S: [Empty]

Residential: [Checked] Primary: [Checked] Validated (Geocoded): [Checked] None: [Empty] From: [Empty] To: [Empty]

Buttons: Add, Close

Add to NHI

Once all the information is entered, click on the Add button.

NHI Compare and Update

- Where more than one entry exists (names and addresses) the selected entry is highlighted in blue (Updates, additions or deletions will apply to the highlighted items)
- The label for information that does not match and cannot be updated is highlighted in orange

The label for information that does not match and can be updated is highlighted in red. Additional information stored on the NHI but not retained in My Practice is displayed with a yellow background. Information retrieved from the NHI system is displayed on the right (Green background) Information stored in the My Practice is displayed on the left (Purple background) Related information is updated together eg Name (separated by black lines)

- When information does not match, your options include:
 - **Update My Practice** – copy the information from the NHI system and update My Practice
 - **Add to NHI** – add information from My Practice to the NHI system
 - **None** – take no action
 - **Delete from NHI** – remove the information from the NHI system
 - **Update NHI** – copy information from My Practice and update the NHI system. If you are Updating or Adding information to the NHI, you may be prompted for additional information.

Update Options

1. Review and determine the appropriate action for each type of information
2. Complete any additional information

Additional Information