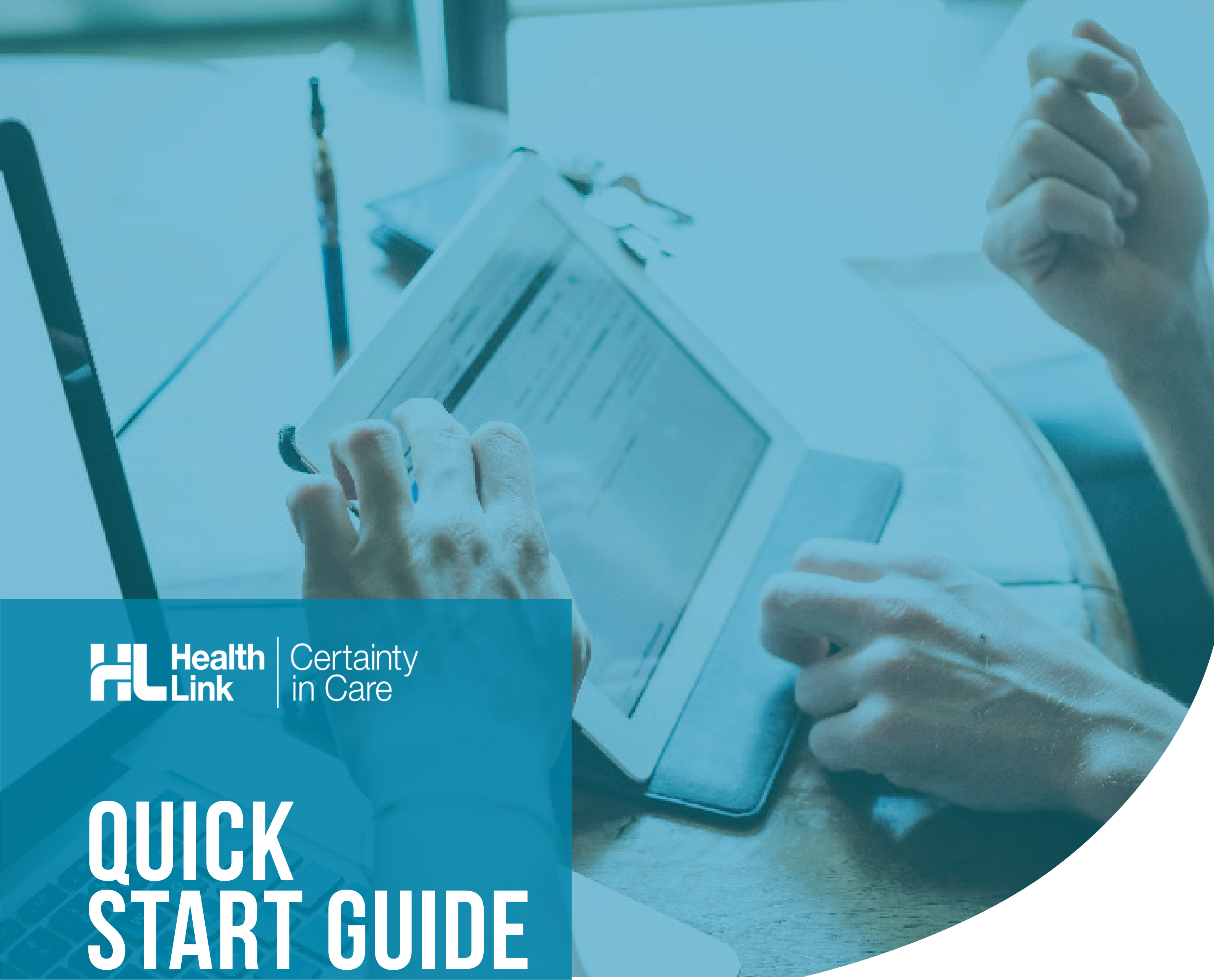


Health Link | Certainty in Care

QUICK START GUIDE

Checking eReferral messages received in Medtech32

We know that a lot of practices already have processes to regularly check electronic communications, but it is important that practices that receive electronic referrals must have a good working knowledge of how their system operates and be able to use it correctly.

If you are in any doubt as to the correct operation of Medtech32 for receiving electronic referrals, or require further training on it, please contact Medtech support on 0800 2 633 832 for assistance.

It is absolutely essential that incoming messages are promptly reviewed and dealt with.

This guide will arm you with the knowledge to perform this task in various ways.

1. Viewing “matched” eReferral messages

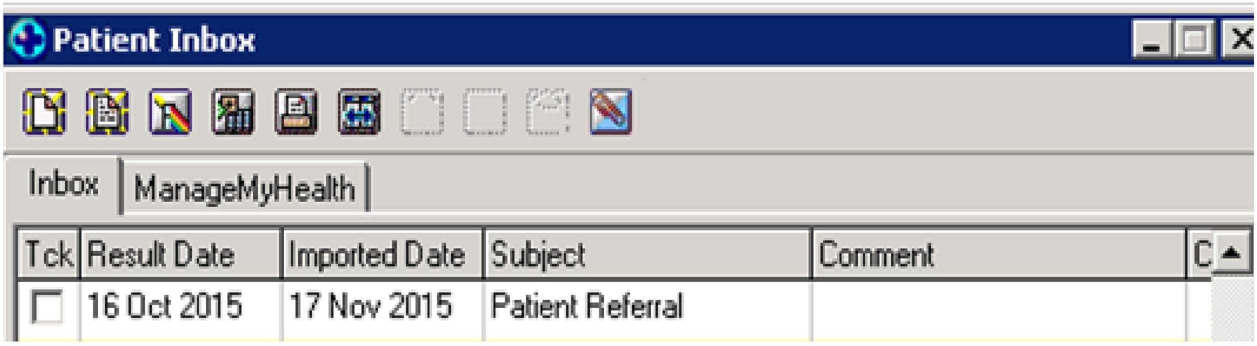
eReferral messages imported into Medtech32 are matched to both a patient and a provider during the import process. When matching has been completed successfully, the eReferral message can be located in both the Provider and Patient Inbox screens.

a. Patient Inbox

Messages matched successfully to a patient can be viewed in the Patient Inbox module. The Patient Inbox can be opened by navigating to **Module > Inbox > Patient Inbox**, or selecting the Patient Inbox icon on your toolbar (if configured).

To open an eReferral message displayed in the Patient Inbox:

a. Ensure that the correct Patient is selected on the Medtech32 Patient Palette
b. Open the Patient Inbox module
c. Browse the Patient Inbox list screen
d. Double click on the eReferral to open the View Patient Inbox screen
e. The received eReferral message will be displayed

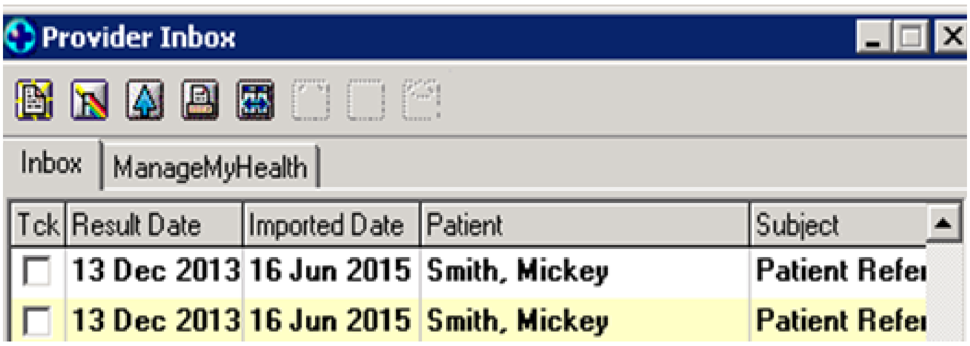


b. Provider Inbox

Messages matched successfully to a provider can be viewed in the Provider Inbox module. The Provider Inbox can be opened by navigating to **Module > Inbox > Provider Inbox**, or selecting the Provider Inbox icon on your toolbar (if configured).

To open an eReferral message displayed in the Provider Inbox:

a. Open the Provider Inbox module
b. Browse the Provider Inbox list screen
c. Double click on the eReferral to open the View Provider Inbox screen
d. The received eReferral message will be displayed



2. View Attachments

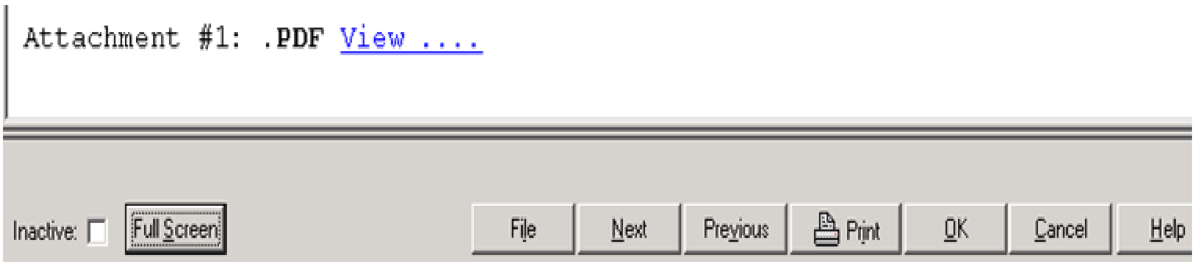
eReferral messages imported into Medtech32 have the ability to include a number of attachments along with the eReferral message. It is important for you to review the eReferral message received thoroughly to ensure you have viewed any and all attachments included with the eReferral message to ensure that have the full and complete details

Any attachments received within your eReferral message will be listed in the message text as ‘Attachment #1’, ‘Attachment #2’ etc.

To open an eReferral message attachment:

a. Open the eReferral message from the Patient or Provider Inbox list screen
b. Locate the ‘Attachment’ headings within the message text
c. Click on the ‘View….’ link to open the attachment
d. The attachment file will be displayed in the relevant system application for the identified file type
e. Complete steps b, c and d for each attachment identified in the message text

Note: If you cannot open an attachment it is possible that you do not have the relevant program installed for that file type. Please contact your local IT support or the Medtech support desk if this happens.

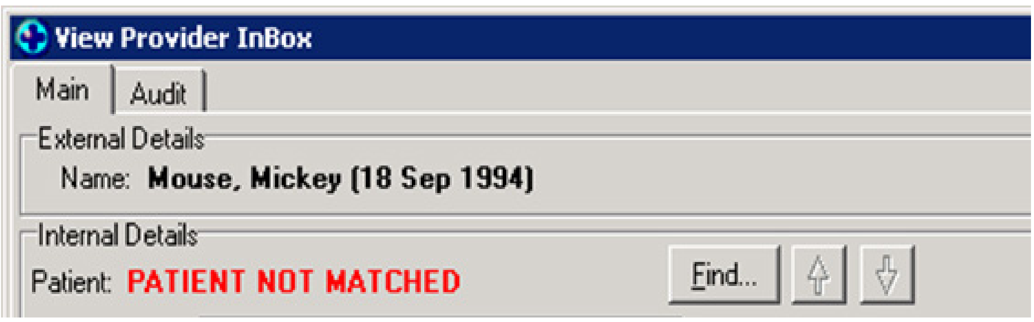


3. Managing eReferral messages ‘unmatched’ to a Patient

There is a possibility that eReferral messages imported into Medtech32 may be un-successfully matched to a Patient in your Medtech32 database, but may be matched to a Provider. If this occurs the eReferral message will only be displayed in the Provider Inbox and will need to be manually matched to a Patient.

To open a eReferral message displayed in the Provider Inbox

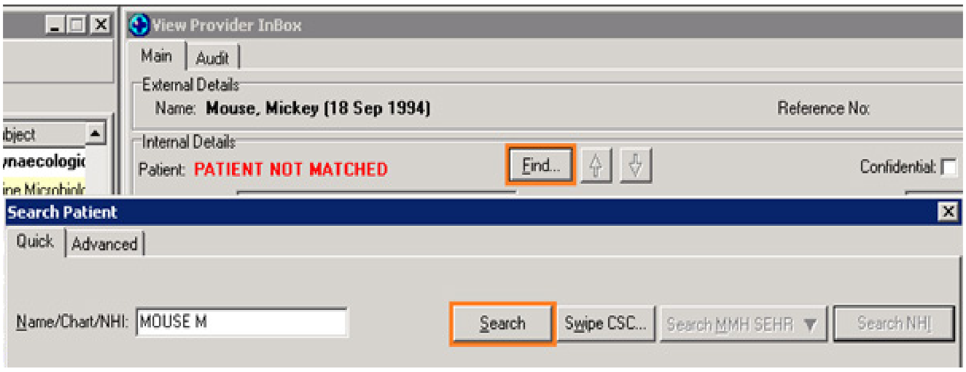
a. Open the Provider Inbox module
b. Browse the Provider Inbox list screen
c. Double click on the eReferral to open the View Provider Inbox screen
d. The received eReferral message will be displayed
e. You will note the **‘PATIENT NOT MATCHED’** text displayed in the ‘Internal Details’ section of the screen

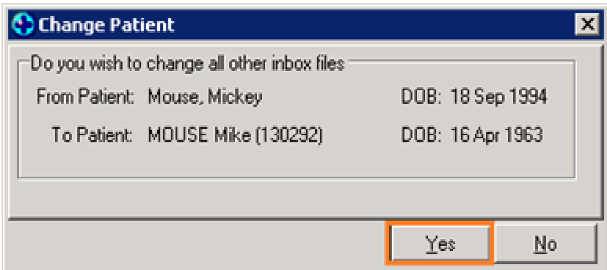


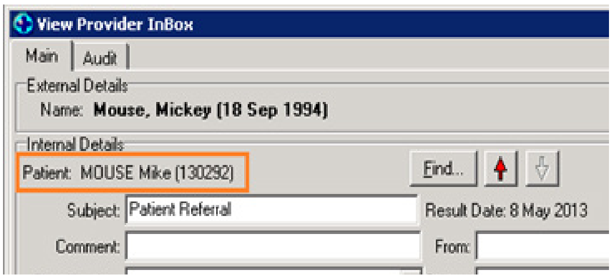
To match the eReferral message to a Patient in your database:

a. Click on the ‘Find’ button, the ‘Search Patient’ screen will be displayed
b. Enter the search criteria and click on the ‘Search’ button
c. Select the relevant Patient from the patient list displayed
d. Click on the Ok button, the ‘Change Patient’ screen will be displayed
e. Click on ‘Yes’ to assign the eReferral message to the selected Patient

f. The ‘PATIENT NOT MATCHED’ text will be updated to show the correct Patient name
g. The eReferral message will now be displayed in the Patient Inbox screen







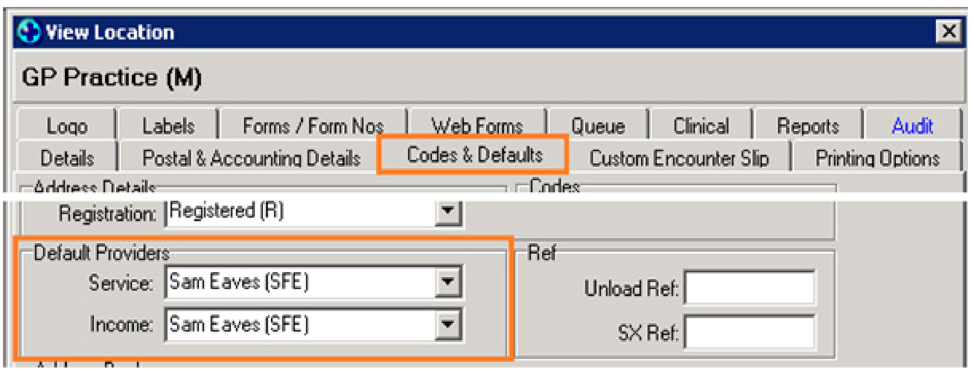
4. Managing eReferral messages ‘unmatched’ to a Provider

There is a possibility that eReferral messages imported into Medtech32 may be unsuccessfully matched to a Provider in your Medtech32 database, but may be matched to a Patient. If this occurs the eReferral message will be allocated to the Provider Inbox of the **default Service Provider** configured in your Location setup.

The default Service Provider Inbox will need to be checked by someone within the Practice on a regular basis and any messages received should be allocated to the correct Provider so that they can be reviewed and actioned.

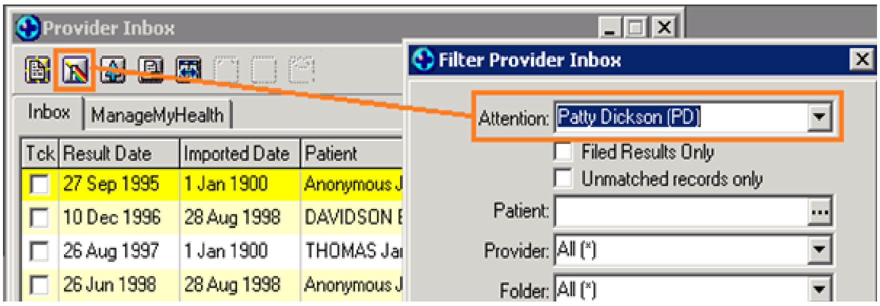
Identifying the Location default Service Provider

a. Navigate to Setup > Location > Location Settings
b. Double click on the correct Location in the Location list screen to open the View Location screen
c. Click on the Codes & Defaults tab
d. Locate the ‘Default Providers’ section on the screen
e. Identify the default ‘Service’ provider
f. Click on OK or Cancel to close the screen



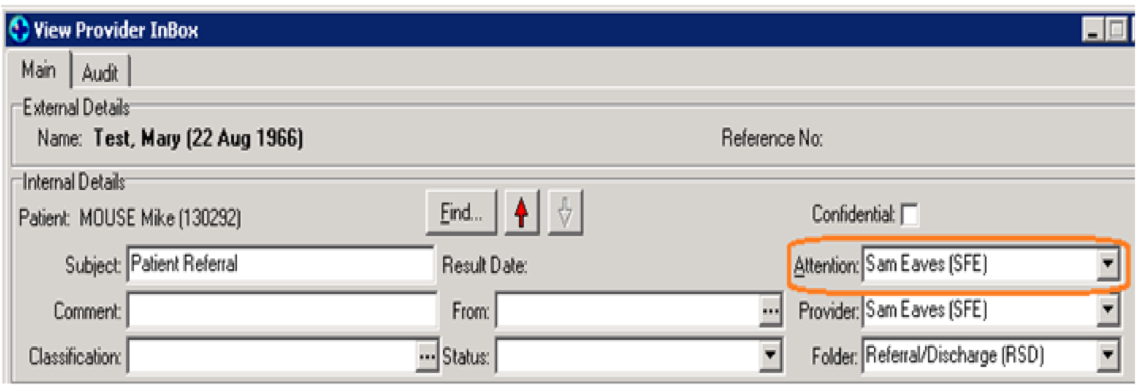
To check messages in the default Service Provider Inbox

a. Open the Provider Inbox module
b. Click on the Filter icon, the Filter Provider Inbox screen will be displayed
c. Click on the 'Attention' drop down list, and select the name of the default Service Provider
d. Click on the OK button
e. The Filter Provider Inbox screen will be closed, and the Provider Inbox list screen updated to show messages that have been allocated to the default Service Provider



To allocate an eReferral message to the correct Provider

a. Browse the Provider Inbox list screen
b. Double click on the eReferral to open the View Provider Inbox screen
c. The received eReferral message will be displayed
d. Click on the 'Attention' drop down list, and select the name of the correct Provider
e. Click on the OK button
f. The View Provider Inbox screen will be closed
g. The eReferral message will be allocated to the correct Provider, and will be available in their Provider Inbox screen for review

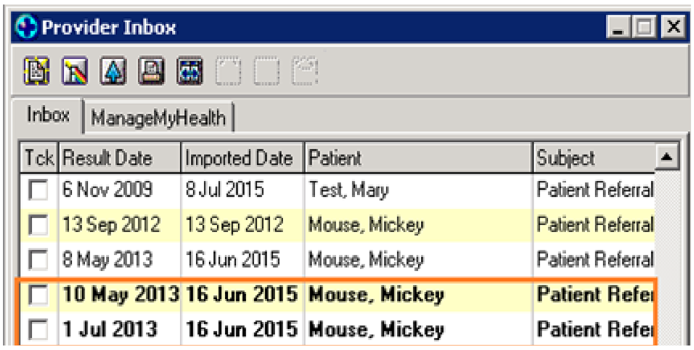


Health Link | Certainty in Care

Hints and Tips

a. Identifying New/Unread messages

Any new and unread eReferral messages displayed in the Provider Inbox will be shown in **Bold** text.
This ensures that you are easily able to identify which messages you have viewed and which you still need to review.



Once an eReferral message has been opened and viewed by a Provider, the message will no longer be in bold text, and will be displayed in plain text.

b. Filing messages

It is important to ensure that once you have reviewed and actioned an eReferral message, that you 'File' it out of your Provider Inbox.

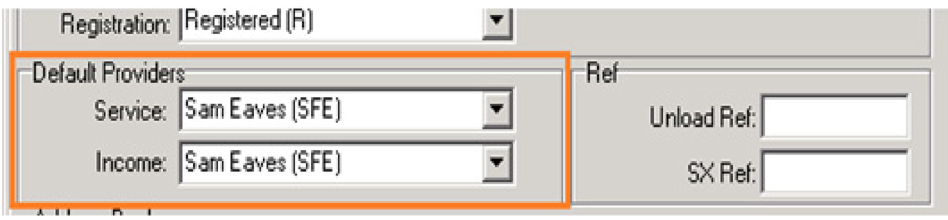
This will ensure that the Provider Inbox is easy to manage and does not contain an unnecessary list of incoming messages which have already been reviewed and actioned.

To 'File' an eReferral message, click on the 'File' button when you have completed your review and any actions necessary.

Filing the message will remove it from the Provider Inbox list screen, however it will remain on the relevant Patient Inbox list screen as part of the patient's clinical record.

c. Default Service Provider

It is important to ensure that the **default Service Provider** configured for your practice is a **current and active provider in your database.**



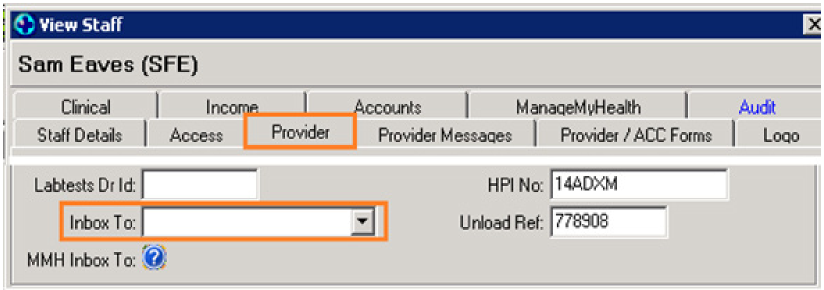
Check your current default Service Provider regularly in **setup > Location > Location Settings > Codes & Defaults** tab, to ensure that your default Service Provider is correct.

Filing the message will remove it from the Provider Inbox list screen, however it will remain on the relevant Patient Inbox list screen as part of the patient's clinical record.

d. Setting "Inbox To"

The Staff Setup in Medtech32 allows for a Provider Inbox to be forwarded to another staff member during absences.

If a provider is going to be absent from the practice, or has moved on, ensure that the 'Inbox To' field on the 'Provider' tab in the Setup > Staff > Members > View Staff screen is mapped to an active and available Provider.



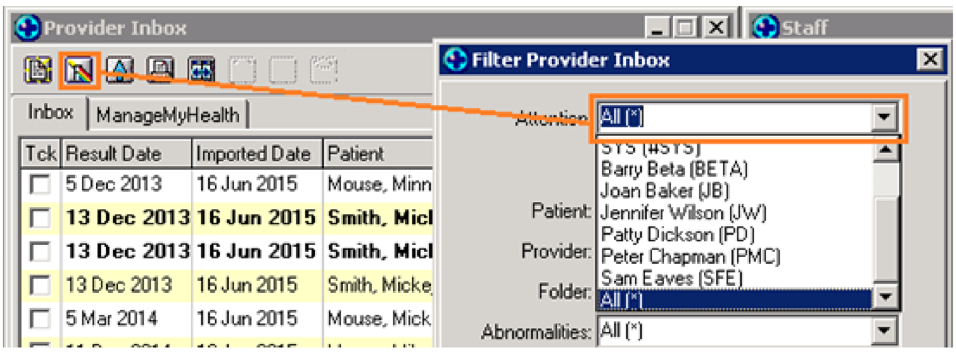
This will ensure that any received eReferral messages are forwarded to another provider for review and action when the addressed provider is not available.

e. Viewing all Provider Inbox messages

The Provider Inbox screen provides the capability for you to view all received messages for all Providers. This function can be used when you are unsure of which provider a message may have been sent to.

To check messages for all providers in the provider inbox:

a. Open the Provider Inbox module
b. Click on the Filter icon, the Filter Provider Inbox screen will be displayed
c. Click on the 'Attention' drop down list, and select the 'All' option
d. Click on the OK button
e. The Filter Provider Inbox screen will be closed, and the Provider Inbox list screen updated to show messages that have been received by all Providers within the practice



All of the locations where an electronic referral can be received inside the Medtech32 Practice Management System, such as Inboxes for "matched" or "unmatched" provider messages, should be checked a minimum of once a day

For all queries, please call the
HealthLink Customer Support Line:

Monday to Friday (except public holidays) 8am- 6pm
Phone 0800 288 887 Support email: helpdesk@healthlink.net

HealthLink

HealthLink
Level 3, 13-15 Teed Street
Newmarket, Auckland 1023
New Zealand

www.healthlink.net
info@healthlink.net

HealthLink delivers certainty in care to over 50,000 healthcare practitioners by integrating their computer systems and enabling them to exchange data, quickly, reliably and securely.

0800 288 887 (NZ office)
1800 125 036 (AU office)

REF_MT32_V1