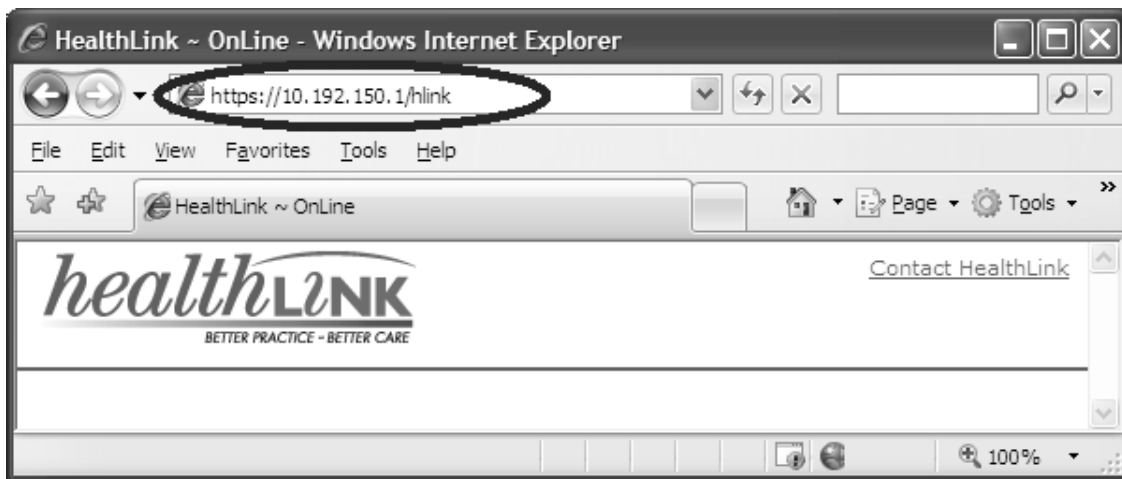


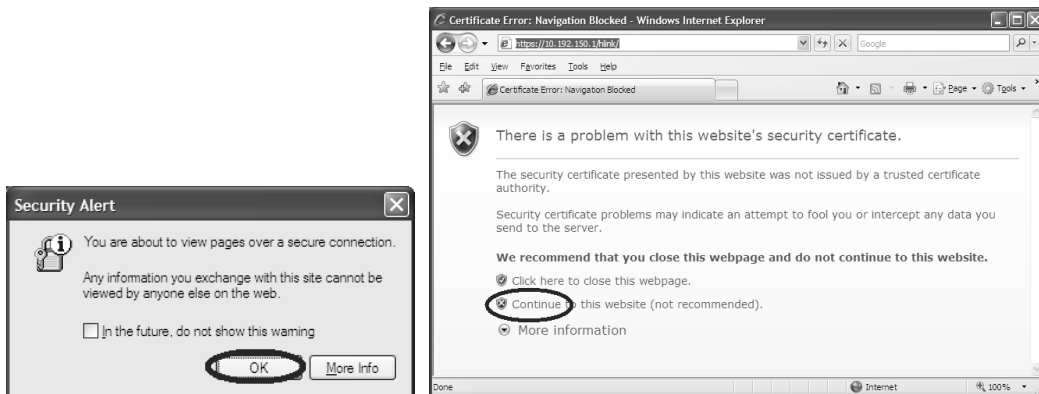
## Primary Options Install Instructions

### Step1 : Goto <https://10.192.150.1/hlink/>

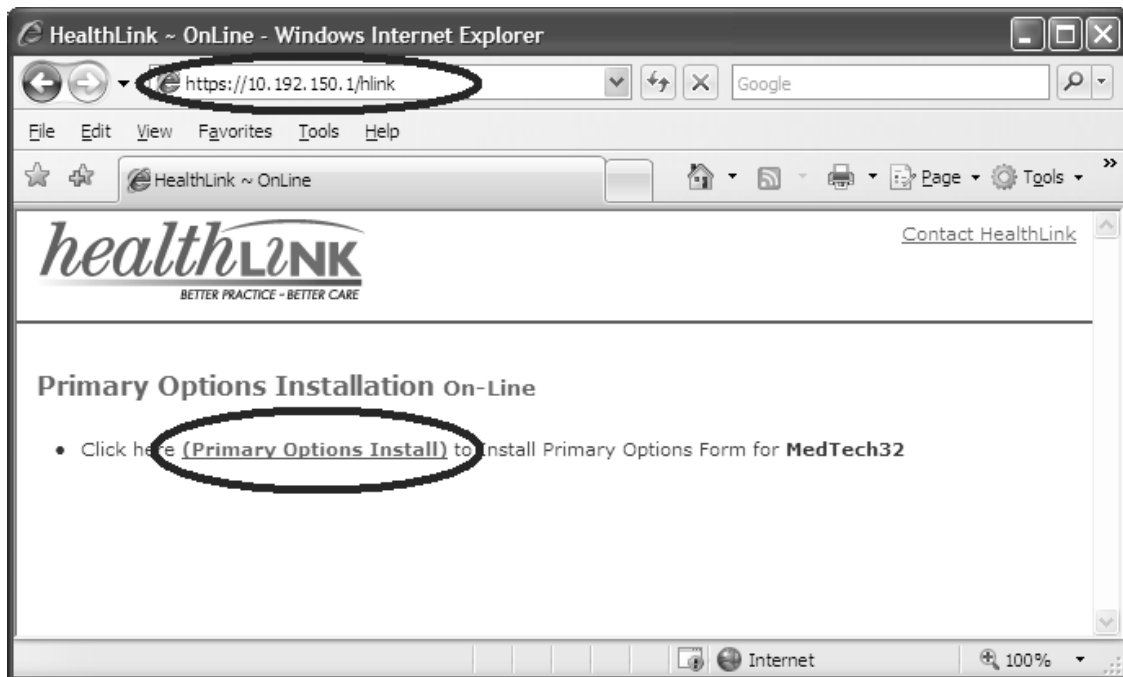
Enter <https://10.192.150.1/hlink/> in the address bar of your browser then press the enter key. (NOTE: The address is a secure connection using https not http)



You may get a certificate message/messages, click ok/continue



### Step 2 : Click (Primary Options Install)

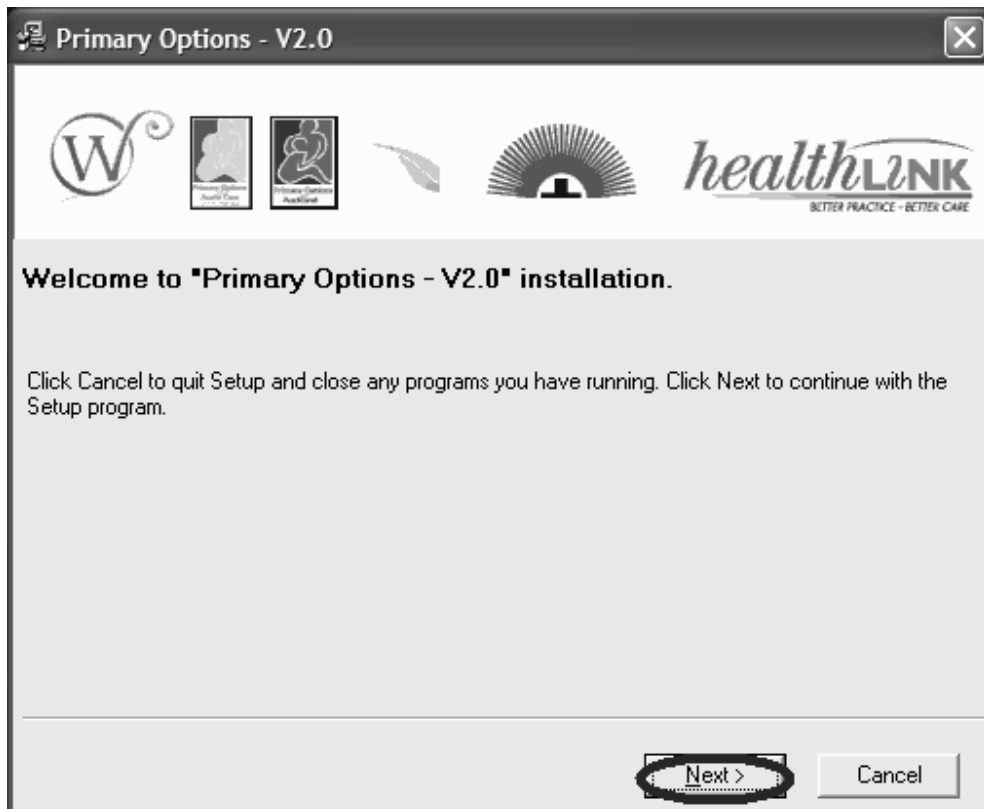


### Step 3 : Download and Run



### Step 4 : Welcome







Click Next



### Step 5: Select your Primary Options Provider

Select the provider most appropriate to your area. Then click next.

Primary Options - V2.0



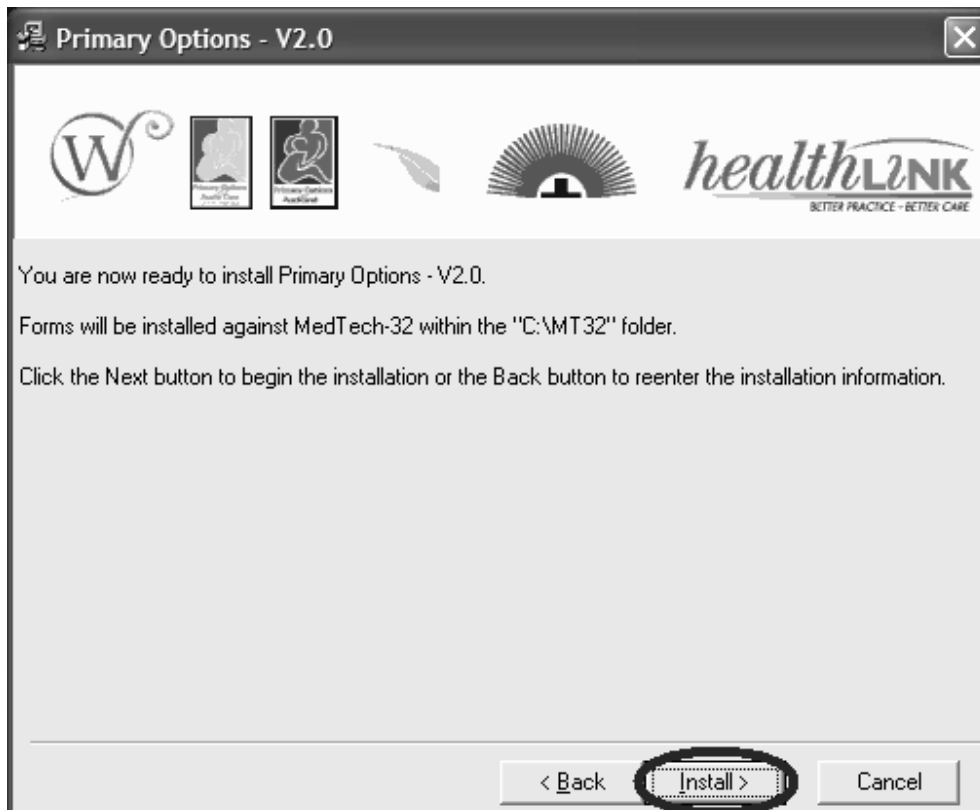
**Please select the service you wish to install :-**

- ☒ Waitamata Primary Options (WPO)
- ☐ Primary Options for Auckland (POAK)
- ☐ Primary Options Counties Manukau (POAC)
- ☐ Hawkes Bay - Coordinated Primary Options (HBPO)

Click Cancel to quit Setup and close any programs you have running. Click Next to continue with the Setup program.

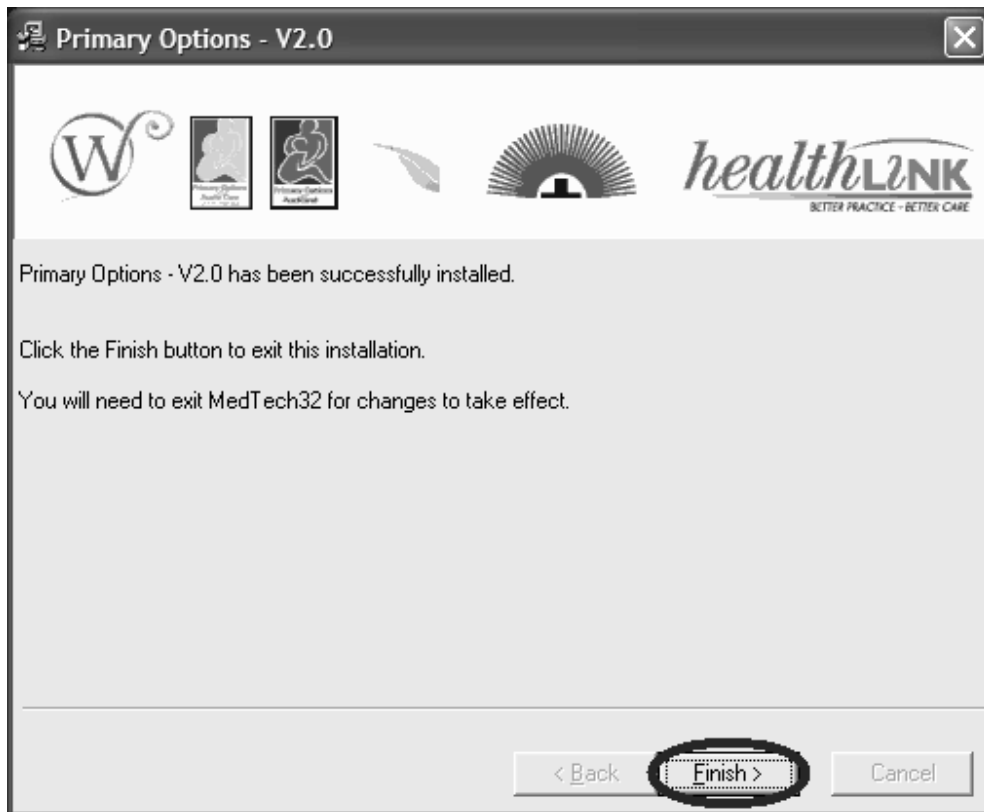
**Next >** Cancel

## Step 5: Install



## Step 5: Finished

Click "Finished" to exit.

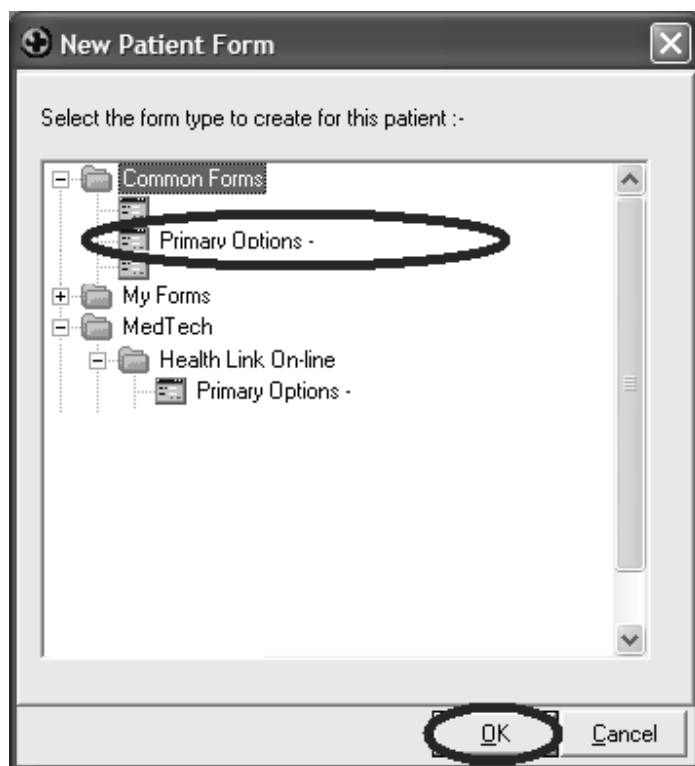


### Step 6: Installation Complete

### Step 7: From Medtech – New Form -> Primary Options

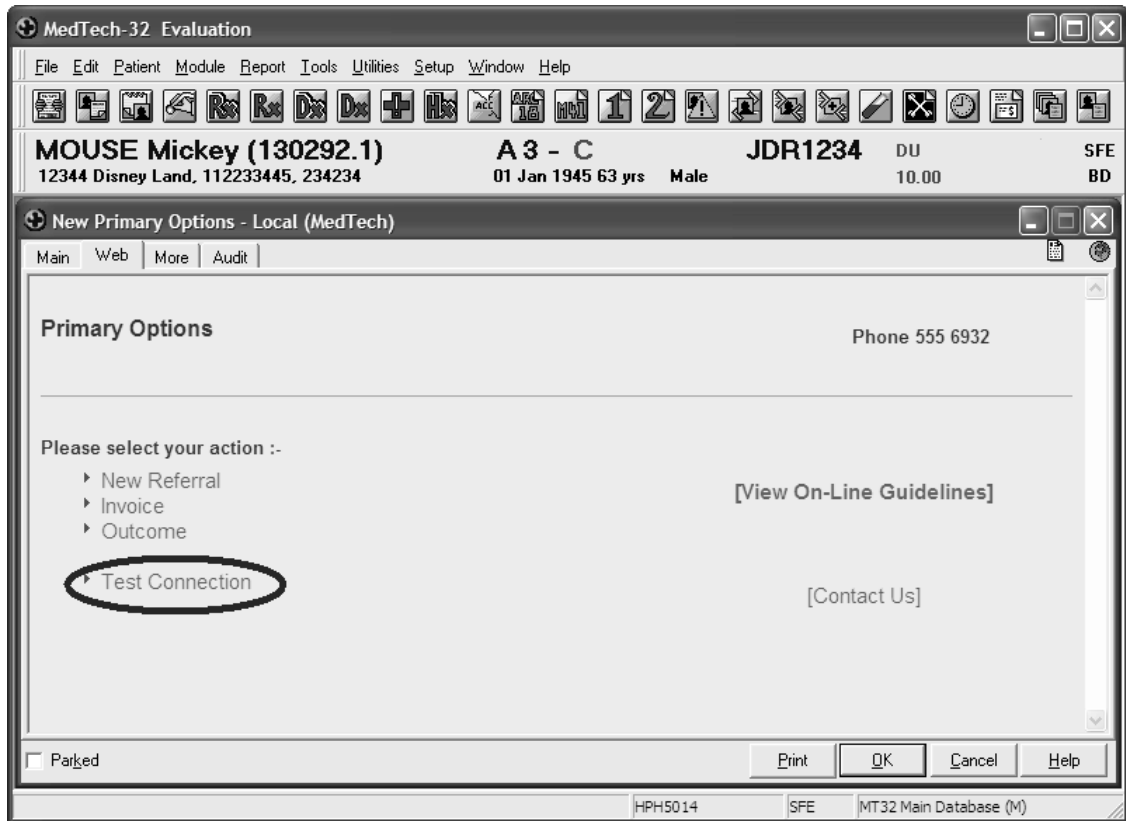
Press **Shift+F3** to open Module -> Advanced Forms -> New Form

Choose your "Primary Options" provider, Then Click OK



### Step 8: Select "Test Connection"

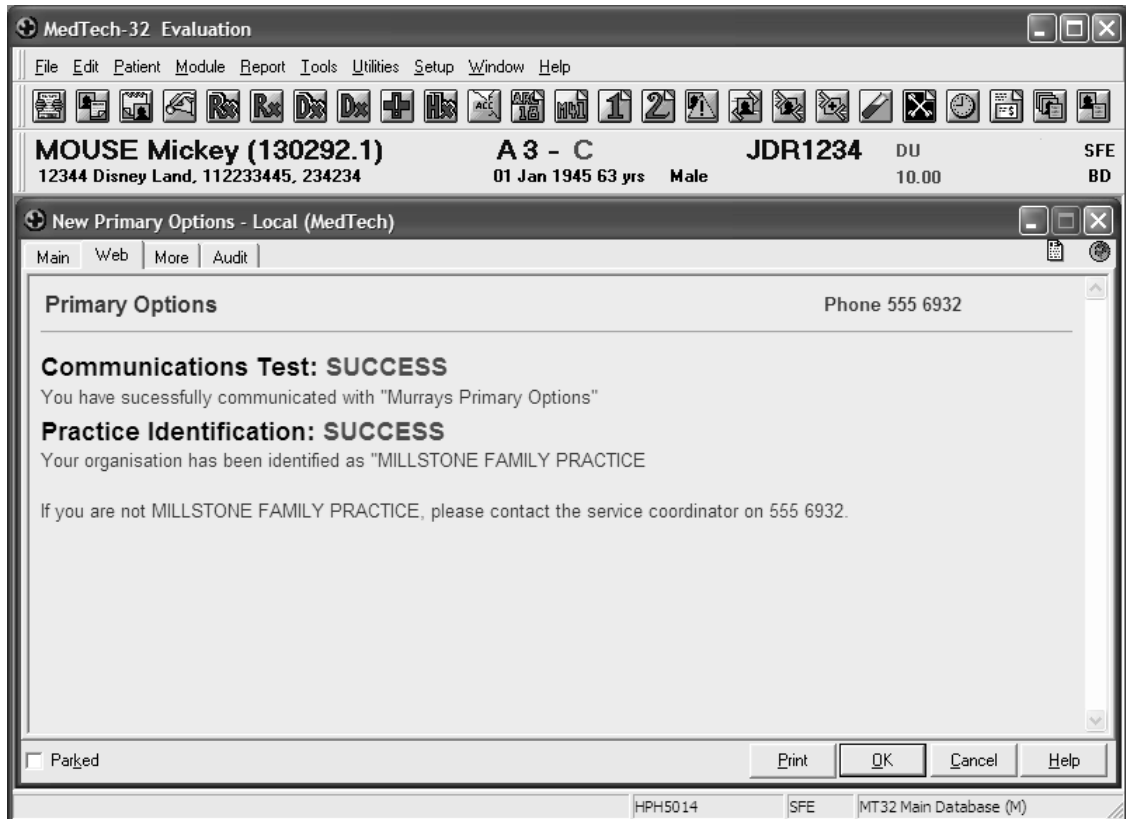
Click "Test Connection"



## Step 9: Success

You should see the success page, now click "Cancel"



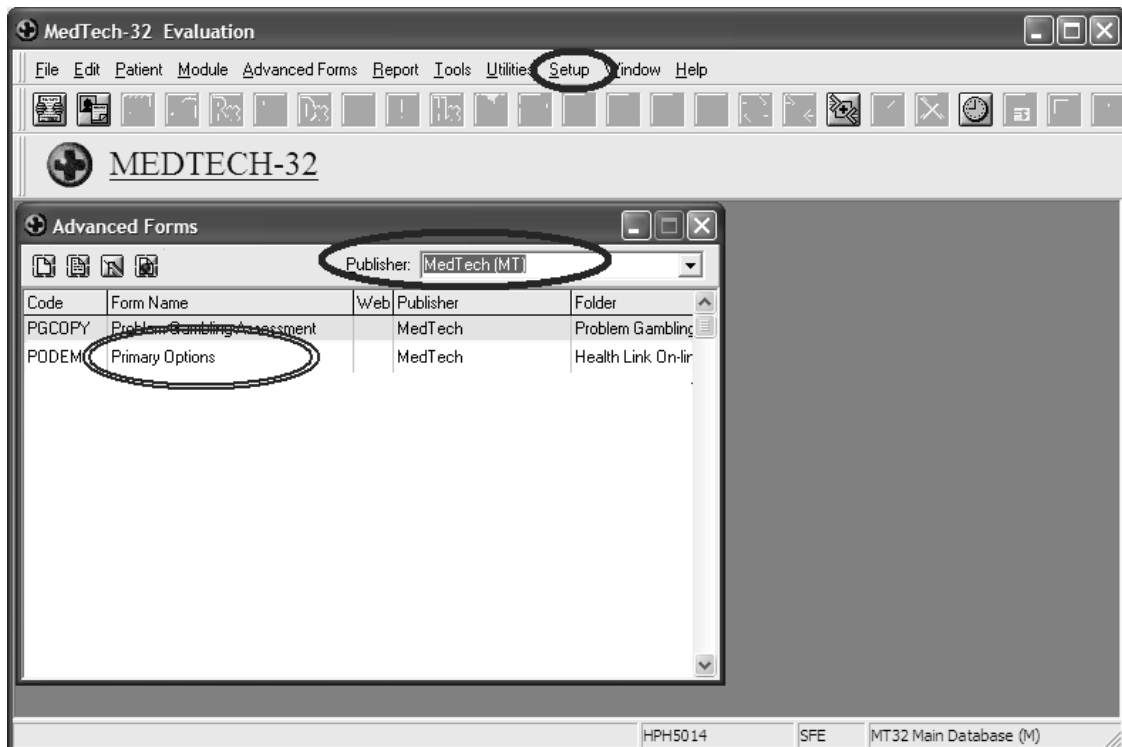


## Step 10: Choose Account for Primary Options Invoices

The following steps are required, To allow invoices to the primary options system to be lodged in MedTech.

### Step 10.1: Goto Advanced Forms Setup

- Goto: **Setup -> Advanced Forms -> Advanced Forms Manager**
- Change the Publisher to **MedTech (MT)**
- Double Click on the **"Primary Options Service"**



## Step 10.2: Change Account

- Goto the **Actions** tab
- Tick [✓] Create Invoice to Account
- Double Click on the “....” and select Account Holder to Bill
- Finally click “OK” to save

**View Advanced Form** [X]

**Primary Options -**

Main | **Actions** | Fields | Field Rules | Form Rules | User Settings | Audit

User Message:

Summary Merge Text: Send To: None

☐ Send to HealthLink Folder:

Export Format:

☒ Create Invoice to Account:

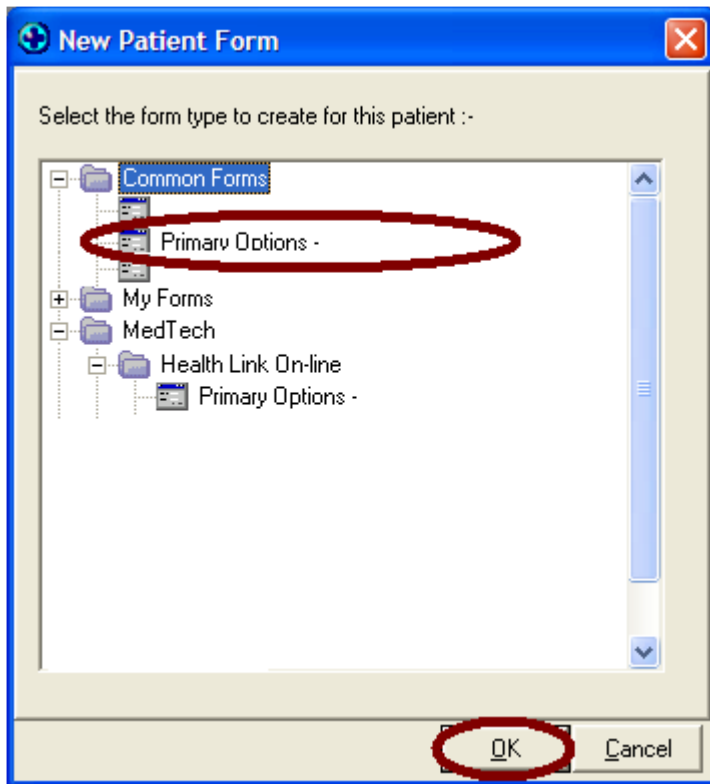
OK Cancel Help

## Primary Options Information for MedTech32 Users

### STEP 1: INITIATE PRIMARY OPTIONS

Press **Shift+F3** ( or choose Module -> Advanced Forms -> New Form )

Choose your “Primary Options” provider (based on where the Patient resides). Click OK



## STEP 2: NEW REFERRAL

Click “New Referral”


**MedTech-32 Evaluation**

File Edit Patient Module Report Tools Utilities Setup Window Help

**MOUSE Mickey (130292.1)** **A 3 - C** **JDR1234** **DU** **SFE**  
12344 Disney Land, 112233445, 234234 01 Jan 1945 63 yrs Male Indian **10.00** BD

**New Primary Options Demo - local (MedTech)**

Main Web More Audit

 **Primary Options** Phone 555 1234

Please select your action :-

- New Referral** Initiate a new referral [\[View On-Line Guidelines\]](#)
- Invoice Add a Invoice to an existing case
- Outcome Complete the outcome form for a case
- Update Information Add additional information to the case [\[Contact Us\]](#)
- View Status Of Claims View the current status of claims
- View Open Cases View all open cases (or cases requiring more information)
- Test Connection Test connection is operational

☐ Parked

Print OK Cancel Help

HPH5014 SFE EDGE (M)

### STEP 3: CONFIRM ELIGIBILITY

Confirm Eligibility then click proceeded.

**MedTech-32 Evaluation**

File Edit Patient Module Report Tools Utilities Setup Window Help

**MOUSE Mickey (130292.1)** **A 3 - C** **JDR1234** **DU** **SFE**  
12344 Disney Land, 112233445, 234234 01 Jan 1945 63 yrs Male Indian **10.00** BD

**New Primary Options Demo - local (MedTech)**

Main Web More Audit

**Confirmation of Eligibility (For a New Referral)**

☒ Patient resides with the Your DHB

☒ Patient would **normally be admitted** / referred to hospital for this episode of care or the hospital has referred the patient to you

☒ Patient will be **managed by you** or a colleague

☒ The period of care under is anticipated to be **3 days or less**

☒ This condition is **NOT** covered by Acc

☒ The anticipated cost of care will be under \$300 (otherwise prior approval is required)

☒ The Patient has been **informed and agrees** to information on this form and other information relating to this illness will be made **available to primary options** and sub-contracted health care providers.

[\[View On-Line Guidelines\]](#)

[\[Contact Us\]](#)

**PROCEED WITH REFERRAL**

☐ Parked

Print OK Cancel Help

HPH5014 SFE EDGE (M)

## Step 4 COMPLETE THE REFERRAL

Enter the Diagnosis, Coding, add notes then submit

**MedTech-32 Evaluation**

File Edit Patient Module Report Tools Utilities Setup Window Help

**MOUSE Mickey (130292.1)** **A 3 - C** **JDR1234** **DU** **SFE**  
12344 Disney Land, 112233445, 234234 01 Jan 1945 63 yrs Male Indian **10.00** **BD**

**New Primary Options Demo - local (MedTech)**

Main Web More Audit

Case

Case Ref # **NW629994** Provisional/Working Diagnosis Coding

Referral "New"

Date 25 8 2008 Relevant Clinical Information (Expand)

Add Consult Notes

Information

Please coordinate all Ultrasounds with PO

Organisation Millstone Family Practice Cbd p: 09 358 0116 f: 09 379 9188 pho: Harbour PHO

Provider Dr Sam Entwistle #23948 provider not in the list, click [add]

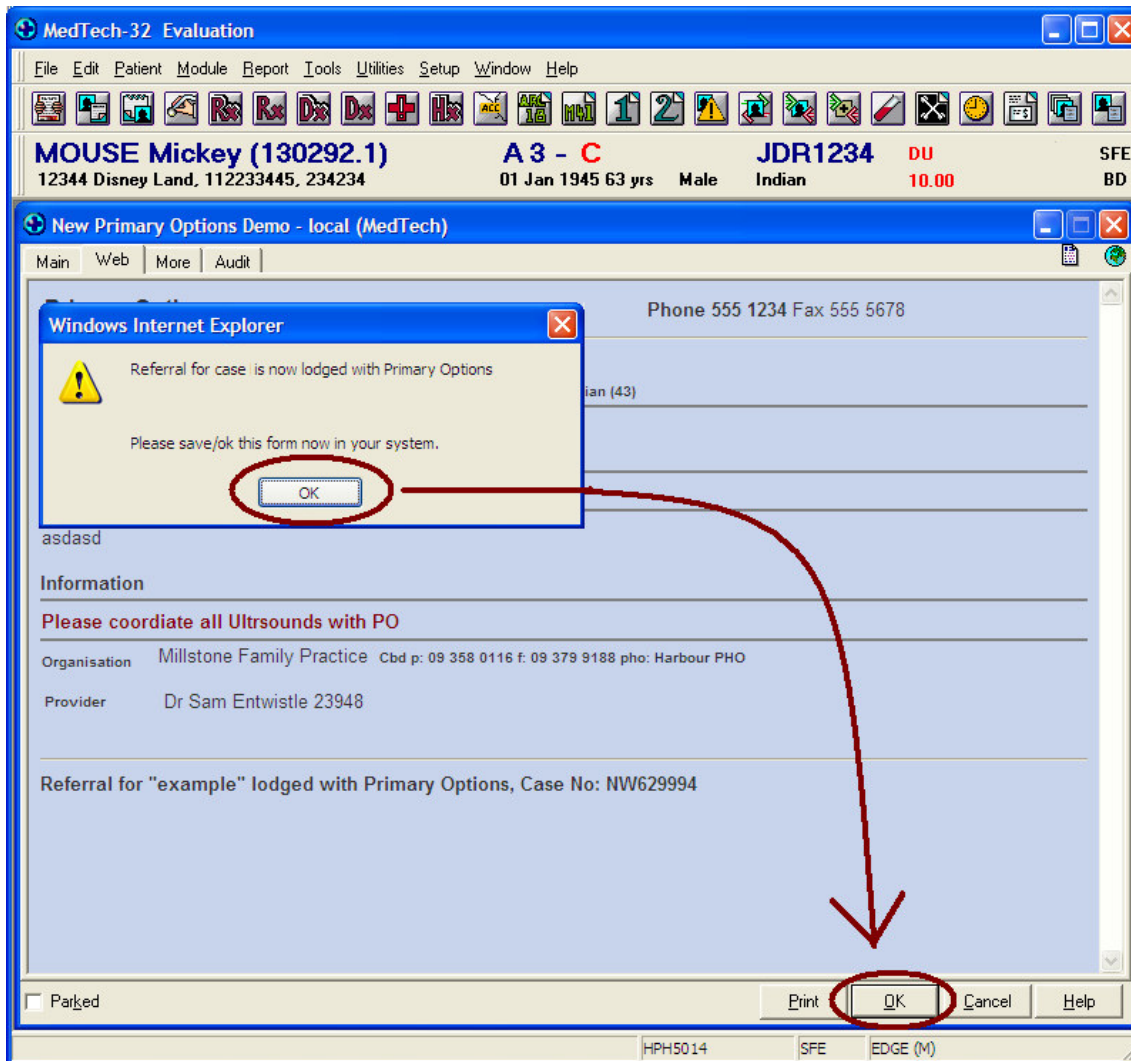
**SUBMIT REFERRAL TO PRIMARY OPTIONS**

☐ Parked Print OK Cancel Help

HPH5014 SFE EDGE (M)

## Step 5 Lodge/Save Form into Medtech

Finally Click OK to save the form in MedTech





## ANYTIME: VIEW STATUS

Provides a full list of all claims lodged in the system and their status.

Follow Step 1 instructions and then choose 'View status of claims'

The screenshot shows the MedTech-32 Evaluation software interface. The main window displays patient information for Mickey Mouse (130292.1) and a list of actions under 'Primary Options'. A red arrow points to the 'View Status Of Claims' option. A secondary window titled 'New Primary Options Demo - local (MedTech)' is open, showing a table of claims.

**Primary Options**

Please select your action :-

- New Referral Initiate a new referral
- Invoice Add a Invoice to an existing case
- Outcome Complete the outcome form for a case
- Update Information Add additional information to t
- View Status Of Claims** v the current status of
- View Open Cases View all open cases (or cases res
- Test Connection Test connection is operational

**New Primary Options Demo - local (MedTech)**

DATE	TYPE/INV NO	CASE NO	AMOUNT	STATUS / PAID
25 Aug 2008	Referral	NW629994	-	New
25 Aug 2008	Invoice	NW620683	12.00	New
01 Aug 2008	Update	NW620683	-	New
01 Aug 2008	Outcome	NW497350	-	New
01 Aug 2008	Invoice	NW497350	-	New
01 Aug 2008	Update	NW497350	-	Accepted
01 Aug 2008	Referral	NW497350	-	New
01 Aug 2008	Update	NW472225	-	Accepted
01 Aug 2008	Update	NW123456	-	Accepted
01 Aug 2008	Outcome	NW620683	-	M/O Review
01 Aug 2008	Referral	NW620683	-	Accepted

Buttons: Parked, Print, OK, Cancel, Help

## OUTCOME

This section allows an Invoice and the Outcome to be processed. This provides Primary Options with the final information required to complete the claim and must be processed (preferably within 30 days of initiation date)

Follow Step 1 instructions and then choose 'Outcome'. You can enter the invoice in this section also, or you may enter the invoice separately as indicated in next step. Ensure all relevant consultation notes are added.

**MedTech-32 Evaluation**

File Edit Patient Module Report Tools Utilities Setup Window Help

**MOUSE Mickey (130292.1)** **A 3 - C** **JDR1234** **DU** **SFE**  
12344 Disney Land, 112233445, 234234 01 Jan 1945 63 yrs Male 10.00 BD

**New Primary Options - Local (MedTech)**

Main Web More Audit

**Primary Options** Phone 555 6932

Case **EG100000** example (Other infection)

**Outcome "New"**

Date 3 6 2008 Relevant Clinical Information (Expand)

Add Consult Notes

Final/Eventual Diagnosis Coding

Outcome of episode of care:

Organisation Millstone Family Practice Mairangi Bay p: 09 358 0116 f: 09 477 2091 pho: Harbour PHO

Provider Dr Sam Entwistle #A88984-3 provider not in the list, click [add]

**SUBMIT OUTCOME TO PRIMARY OPTIONS**

☐ Parked Print OK Cancel Help

HPH5014 SFE MT32 Main Database (M)

## INVOICE

This section allows you to lodge an Invoice in the system.

Follow Step 1 instructions and then choose 'Invoice'

**NOTE: An invoice will be lodged in the medtech32 system, when saved, please ensure the providers on the more tab are correct**

**MedTech-32 Evaluation**

File Edit Patient Module Report Tools Utilities Setup Window Help

**MOUSE Mickey (130292.1)** **A 3 - C** **JDR1234** **DU** **SFE**  
12344 Disney Land, 112233445, 234234 01 Jan 1945 63 yrs Male 10.00 BD

**New Primary Options - Local (MedTech)**

Main Web More Audit

**Primary Options** Phone 555 6932

Case **EG100000** example (Other infection)

**Invoice "New"**

Date 3 6 2008 Relevant Clinical Information [\(Expand\)](#)

Organisation Millstone Family Practice

Provider Dr Sam Entwistle #A88984-3 provider not in the list, click [\[add\]](#)

**Services**

DATE OF SERVICE	SERVICE CODE + ANNOTATION	AMOUNT
3 6 2008	GP Home Visit Home Visit By Doctor, Annotate Milage/After hours	75.00
3 6 2008	Practice Room Obs Initial Nurse observation, (1:1 most of the time),	60.00
3 6 2008		
3 6 2008		
3 6 2008		
3 6 2008		
3 6 2008		
3 6 2008		

☐ Parked

Print OK Cancel Help

HPH5014 SFE MT32 Main Database (M)