

Running the Batch Invitation Utility – Medtech Evolution

Purpose: Send an invitation to use Manage My Health to all of your eligible patients at once, decreasing the need for your reception team to invite patients one by one. Patients receive an email, inviting them to register, and have the option to opt out/decline meaning they will not be included in future invitations to Manage My Health if they don't wish to be.

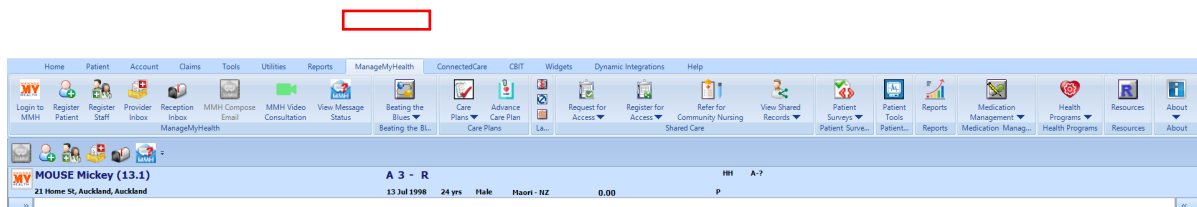
Eligible Patients

This utility will run a query, and pull a list of your patients that meet the following criteria:

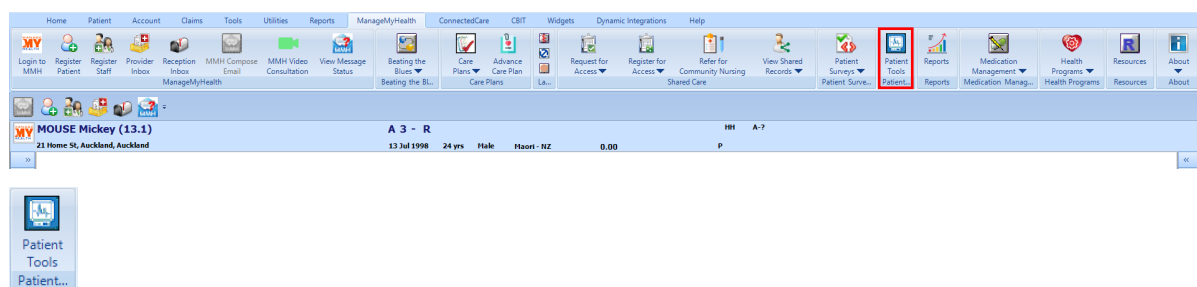
- registered patients ('R')
- enrolled
- Not currently on the Patient Portal

Running the Batch Invitation Utility

1. Put a patient on the palette (it does not matter which patient you choose; it can be a test patient), and go to the Manage My Health ribbon menu:



2. Select the 'Patient Tools' icon:



- Once the webform loads, select the 'Launch Batch Invitation Utility' button:



- Ensure you have three green ticks on the left-hand side. You cannot proceed with running the utility if these are not green. If this is the case, please contact your account manager for support.



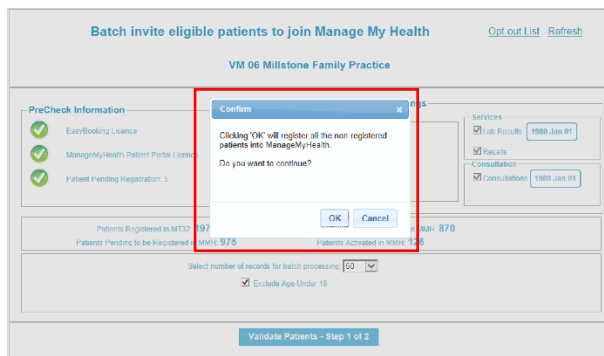
The screenshot shows the 'Patient Batch Invitation' form for 'VM 06 Millstone Family Practice'. The 'PreCheck Information' section on the left has three green ticks next to the following items: 'EasyBooking Licence', 'ManageMyHealth Patient Portal Licence', and 'Patient Pending Registration: 5'. The 'Health Record Upload Settings' section in the middle has checkboxes for 'All Classifications', 'All Medications', 'Immunisations', and 'Medical Warnings', all of which are checked. The 'Services' section on the right has checkboxes for 'Lab Results', 'Recalls', 'Consultation', and 'Consultations', with dates set to '1980 Jan 01'. Below these sections, there are statistics: 'Patients Registered in MTH: 1977', 'Patients Registered but not activated in MTH: 870', 'Patients Pending to be Registered in MTH: 575', and 'Patients Activated in MTH: 125'. A dropdown menu for 'Select number of records for batch processing' is set to '50'. A checkbox for 'Exclude Age Under 18' is checked. At the bottom, there is a button labeled 'Validate Patients - Step 1 of 2'.

- Select the number of invitations you want to send at once – the recommended default is '200'. Ensure you select the 'Exclude Age Under 18' button. Click 'Validate Patients – Step 1 of 2'.

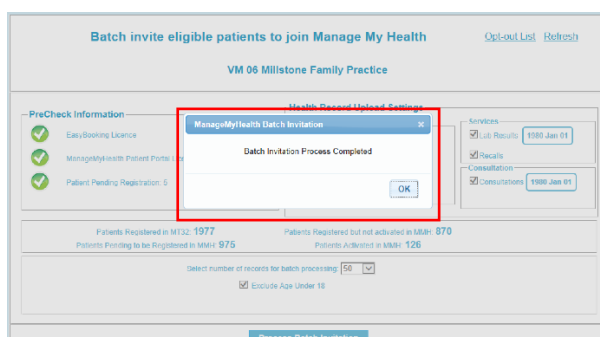


This screenshot is identical to the previous one, showing the 'Patient Batch Invitation' form. The 'PreCheck Information' section has three green ticks. The 'Health Record Upload Settings' section has all checkboxes checked. The 'Services' section has all checkboxes checked with dates set to '1980 Jan 01'. The statistics are the same. The 'Select number of records for batch processing' dropdown is set to '50'. The 'Exclude Age Under 18' checkbox is checked. The 'Validate Patients - Step 1 of 2' button at the bottom is highlighted with a red rectangle.

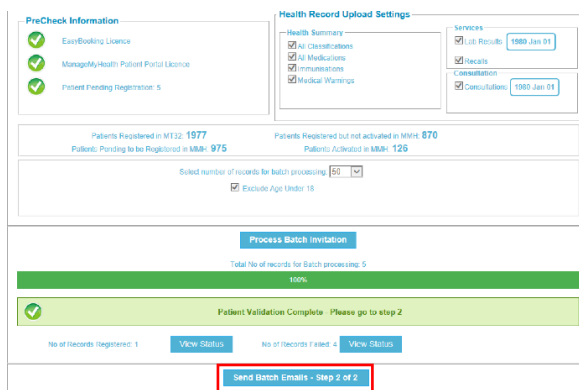
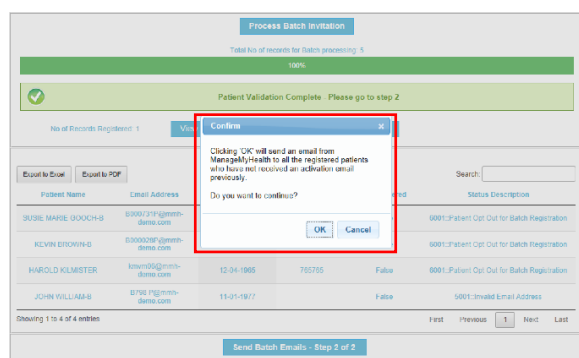
- Confirm by clicking 'OK' to the confirmation message that appears:



- You will then see a message confirming this validation has been completed.



- You will then be taken back to the main screen, where you need to click the 'Send Batch Emails – Step 2 of 2' button:

10. Repeat steps 5-9 until all patients' pending registration is complete (=0)

Batch Registration from PMS to MMH [Opt-out List](#) [Refresh](#)

Medical Centre

PreCheck Information

- ☒ EasyBooking Licence
- ☒ ManageMyHealth Patient Portal Licence
- ☒ Patient Pending Registration: 0 (No record found)

Health Record Upload Settings

Health Summary

- ☒ All Classifications
- ☒ All Medications
- ☒ Immunisations
- ☒ Medical Warnings

Services

- ☒ Lab Results 1980 Jan 01
- ☒ Recalls
- Consultation**
- ☒ Consultations 1980 Jan 01

Patients Registered in Evolution: **1**

Patients Registered but not activated in MMH: **0**

Patients Pending to be Registered in MMH: **1**

Patients Activated in MMH: **0**

Select number of records for batch processing: 50 ▼

☒ Exclude Age Under 18

Viewing the Opt-Out list

To view the list of patients who have opted-out from the Batch Invitation, click on the 'Opt-out list' at the top right-hand side of the webform:

Batch Registration from PMS to MMH [Opt-out List](#) [Refresh](#)

Medical Centre

PreCheck Information

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- ☒ ManageMyHealth Patient Portal Licence
- ☒ Patient Pending Registration: 0 (No record found)

Health Record Upload Settings

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- ☒ All Classifications
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- ☒ Lab Results 1980 Jan 01
- ☒ Recalls
- Consultation**
- ☒ Consultations 1980 Jan 01

Patients Registered in Evolution: **1**

Patients Registered but not activated in MMH: **0**

Patients Pending to be Registered in MMH: **1**

Patients Activated in MMH: **0**

Select number of records for batch processing: 50 ▼

☒ Exclude Age Under 18

Batch Invitation – The Patient Experience

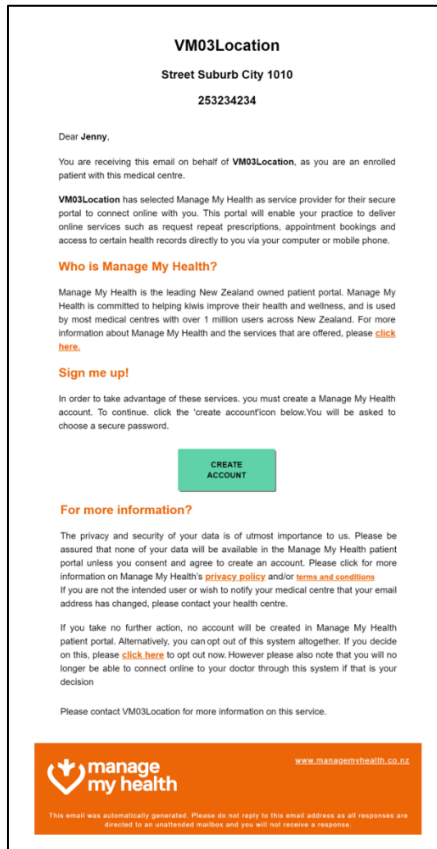
Purpose: Practices now have the option to invite patients through an automated utility within the PMS, onto the Manage My Health patient portal. This guide walks you through the steps that the patient experiences when receiving and responding to the invitation,

Prerequisites

Prior to receiving this email, the practice needs to run the Batch Invitation utility – for more instructions on this please refer to the user guide and video titled ‘How to Run a Batch Invitation’

Once you have run the Batch Invitation utility

1. On completing the Batch Invitation process, below is an example of the initial email the patient receives. Information regarding the practice, location and patient are all personalised for the health centre and patient:



2. If the patient selects 'Create Account', this takes them through to the Manage My Health website to continue the process.
3. If the patient chooses to 'Opt Out', the patient will not be included in any future batch invitations

Patient Chooses to 'Create Account'

1. Clicking 'Create Account' takes the patient to the Manage My Health website, where they need to confirm their date of birth, create a new password, and confirm their password.

Email address

sama@mmh-demo.com

Date of birth

Day Month Year

Password

Your password must contain:
Minimum 10 characters, 1 Uppercase letter, 1 Lowercase letter, 1 Number

Confirm password

☐ I have read and accept the ManageMyHealth [Terms of Use](#) and [Privacy Policy](#)

ACTIVATE

2. The password must contain 10 characters including: one uppercase, one lowercase and one numerical.
3. The patient must also accept the Terms of Use and Privacy Policy.
4. Once complete, click 'Activate'
5. Patients are then able to login to the portal