

# 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:

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- 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:

Home	Patient	Account	t Claims	Tools	Utilities	Reports Ma	nageMyHealth	ConnectedCa	re CBIT	Wid	gets Dynam	ic Integrations	Help								
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2. Select the 'Patient Tools' icon:





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



4. 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.

W manage my health	Patient Batch Invitation	
	is to join Manage My Health Millistone Family Practice	Opt-out List Refresh
PreCheck Information     Laydooling Lenne     MonophilyHealth Platent Purts Licence     Patient Punding Registration: 5	Health Record Upload Settings	Services Club Results 1980 Jan 01 Consultation Consultation Consultation 1989 Jan 01
	Patients Registered but not activated in MUR: 870 Patients Activated in MUR: 126 ridu for butch processing: 50 v Activate Age Under 18	
Va	lidate Patients - Step 1 of 2	

5. 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'.

W my health	Patient Batch Invitation	
Batch invite eligible patients	to join Manage My Health	Opt-out List Refresh
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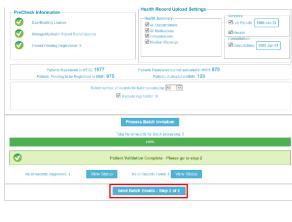
6. Confirm by clicking 'OK' to the confirmation message that appears:

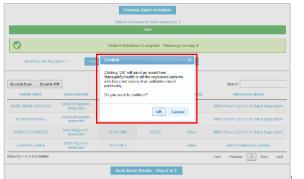
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94	ect number of records for batch processing: 60 💌	

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

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	Exclude Age Under 18	

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







### List of Patients who will receive the invitation:

You also have the option of viewing the records of the patients who will receive the invitation, to view this click the 'View Status' button on the left:

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	100%		Expert is Deal Expert is 20	*				Saardr
			Patient Name	Dmail Address	Date of Birth	NIII Number	Is Registered	Status Description
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No of Records Registered: 1 View Status	No of Records Failed, 4 Victor Status		Showing 1 to 1 of 1 entries					First Previous 1 Next Last
	lend Batch Emails - Step 2 of 2				Send Batcl	h Emails - Step 2 o	12	

#### List of Patients who will not receive the invitation:

You also have the option of viewing the records of the patients who will not receive the invitation, to view this click the 'View Status' button on the right:

This is also a good list to export to excel and follow up with patients to correct their email address if required.

PreCheck Information     Health Record Upload Set     CaryNoticy Learne     Managed				is Batch Invitation cords for Batch process 100%				
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Patient Validation Complete - Please go to ste No of Recents Registered: 1 Ven Status To of Recents Place		HANROLD KILDER I JOHN WITH HAN-1 Straveg 1 to 4 of 4 yet	R794 P@mmh- demo.com	12-04-1985	765 785	False	6001: Patient Opt Cut for Batch Registration 6001-Investid Printl Address First Previous 1 Next Last	
Send Batch Emails - Step 2 of 2	-		100	Send Batch	h Emails - Step 2 o	12	PIDA PINANAN I PRES LAN	

9. You will see a confirmation message once the batch invitation has been sent:

Export to Excel Export to P	DF				Search:		
Patient Name	Email Address	Date of Birth	NHI Number	Is Registered	Status Description		
SUSIE MARIE GOOCH-B	B000731P@mmh- demo.com	12-05-1995		False	6001::Patient Opt Out for Batch Registratio		
KEVIN BROWN-B	B000028P@mmh- demo.com	12-05-1933		False	6001::Patient Opt Out for Batch Registratio		
HAROLD KILMISTER	kmvm06@mmh- demo.com	12-04-1965	765765	False	6001::Patient Opt Out for Batch Registratio		
JOHN WILLIAM-B	B798 P@mmh- demo.com	11-01-1977		False	5001::Invalid Email Address		
howing 1 to 4 of 4 entries					First Previous 1 Next La		
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		P-	tch Emails are Sent				



Batch Registratio	on from PMS to MMH	<u>Opt-out List</u> <u>Re</u>
	Medical Centre	
PreCheck Information	Health Record Upload Settings	
EasyBooking Licence	Health Summary	Services Lab Results 1980 Jan 01
ManageMyHealth Patient Portal Licence	All Medications Immunisations	Recalls Consultation
Patient Pending Registration: 0 (No record found)	Medical Warnings	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	

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

## 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 Registratio	Opt-out List Refresh	
	Medical Centre	
PreCheck Information	Health Record Upload Settin	gs
EasyBooking Licence	Health Summary All Classifications	Services     Image: Services
ManageMyHealth Patient Portal Licence	All Medications	✓ Recalls Consultation
Patient Pending Registration: 0 (No record found)	Medical Warnings	Consultations 1980 Jan 01
Patients Registered in Evolution: 1	Patients Registered but not activated in MM	н: 0
Patients Pending to be Registered in MMH: 1	Patients Activated in MMH: 0	
Select number of rec	cords for batch processing: 50 🗸	
	Exclude Age Under 18	
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# **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:

	Street Suburb City 1010
	253234234
Dear Jenny,	
You are receiving the patient with this med	his email on behalf of VM03Location, as you are an enrolle blcal centre.
portal to connect or online services suc	selected Manage My Health as service provider for their secur nline with you. This portal will enable your practice to delive h as request repeat prescriptions, appointment bookings an alth records directly to you via your computer or mobile phone.
Who is Manag	e My Health?
Health is committed by most medical ce	is the leading New Zealand owned patient portal. Manage M to helping kiwis improve their health and wellness, and is use nfres with over 1 million users across New Zealand. For more anage My Health and the services that are offered, please <u>clic</u>
Sign me up!	
	antage of these services, you must create a Manage My Healt i.e. click the 'create account'icon below.You will be asked t seword.
	CREATE
For more info	rmation?
assured that none portal unless you of information on Man If you are not the in	ecurity of your data is of utmost importance to us. Please to of your data will be available in the Manage My Health patie onsent and agree to create an account. Please click for mo mage My Health's <u>privacy policy</u> and/or <u>terms and conditions</u> tended user or wish to notify your medical centre that your emit d, please contact your health centre.
patient portal. Altern on this, please clic	her action, no account will be created in Manage My Heal hatively, you can opt out of this system allogether. If you decio there to opt out now. However please also note that you will r onnect online to your doctor through this system if that is you
Please contact VM0	3Location for more information on this service.
to mana	de www.managemyhealth.



- 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
<b>a</b>
Your password must contain: Minimum 10 characters, 1 Uppercase letter, 1 Lowercase letter, 1 Number
Confirm password
<b>A</b>
I have read and accept the ManageMyHealth <u>Terms of Use</u> and <u>Privacy</u> <u>Policy</u>
ACTIVATE

- 2. The password must contact 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