

## 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.

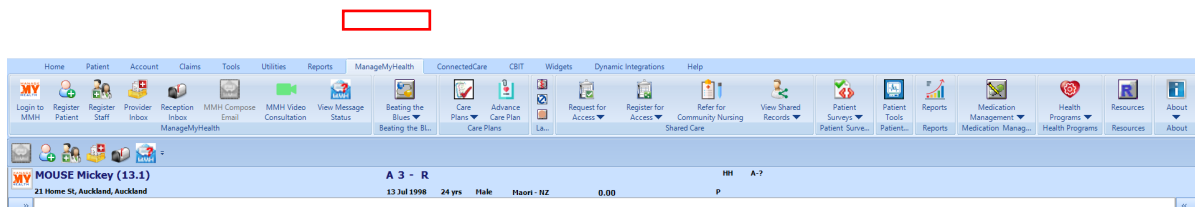
### Eligible Patients

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

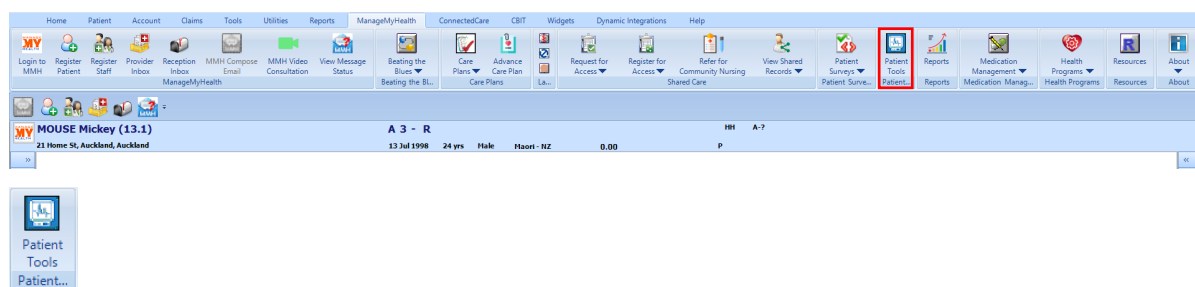
- registered patients ('R')
- enrolled
- Not currently on the Patient Portal

### 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:



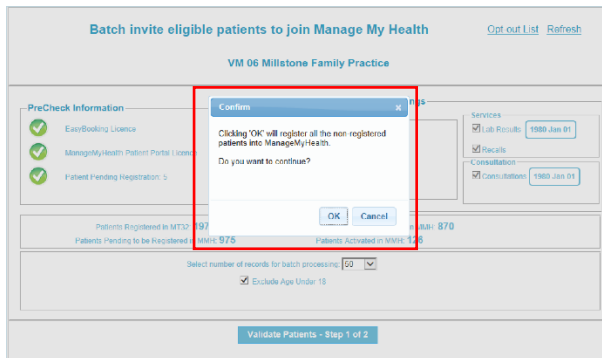
- Ensure you have three green ticks on the left-hand side. You cannot proceed with running the utility if these are not green. If this is the case, please contact your account manager for support.



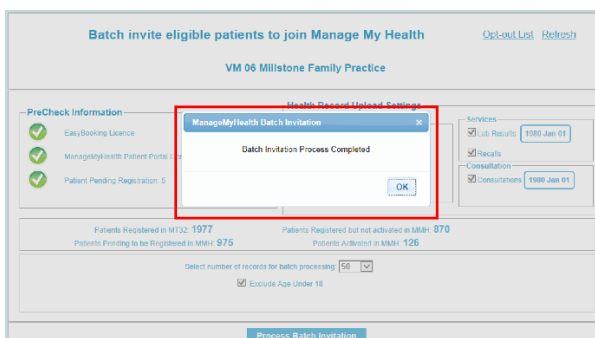
- Select the number of invitations you want to send at once – the recommended default is '200'. Ensure you select the 'Exclude Age Under 18' button. Click 'Validate Patients – Step 1 of 2'.



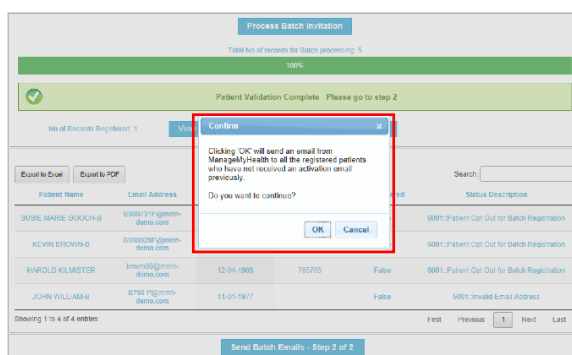
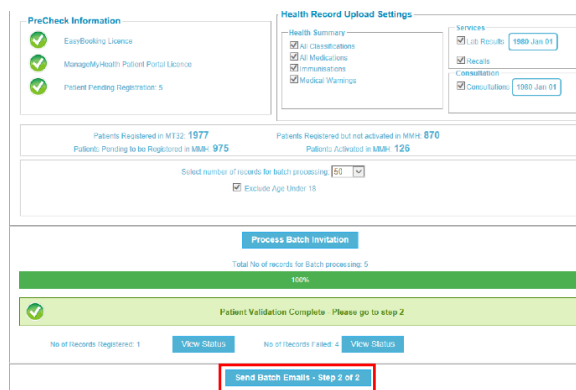
6. Confirm by clicking 'OK' to the confirmation message that appears:



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

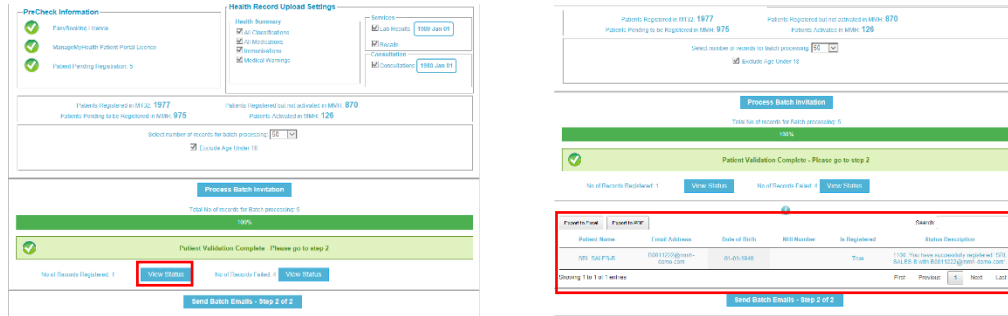


8. You will then be taken back to the main screen, where you need to click the 'Send Batch Emails – Step 2 of 2' button:



## 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:



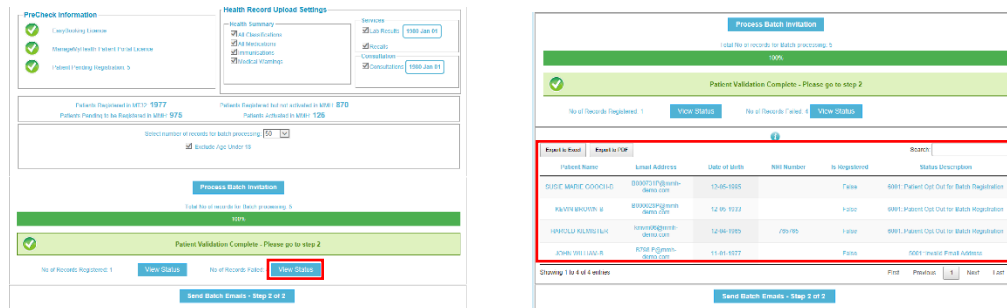
The screenshot shows the 'Process Batch Invitation' interface. On the left, there are 'PreCheck Information' and 'Health Record Upload Settings' sections. The main area displays statistics: 'Patients Registered in MICH: 1977', 'Patients Pending to be Registered in MICH: 975', 'Patients Registered but not activated in MICH: 870', and 'Patients Activated in MICH: 126'. A 'Process Batch Invitation' button is visible. Below, a table lists patients to be invited, with a 'View Status' button highlighted in red.

First Name	Last Name	Date of Birth	NHI Number	Is Registered	Status Description
SUSIE	GOOCH-B	12-05-1995		False	6001::Patient Opt Out for Batch Registration

## 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:

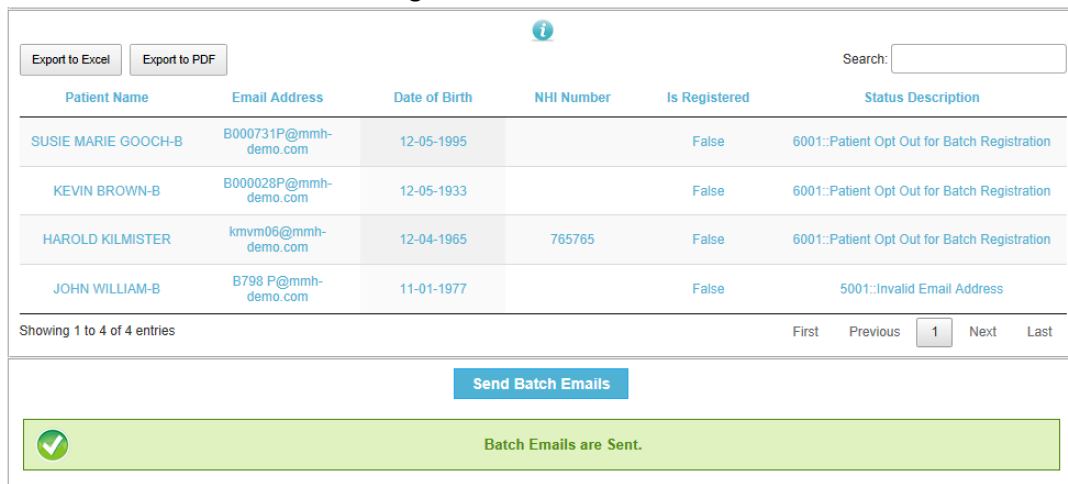
**This is also a good list to export to excel and follow up with patients to correct their email address if required.**



The screenshot shows the 'Process Batch Invitation' interface. On the right, there are 'View Status' buttons for 'No of Records Registered' and 'No of Records Failed'. Below, a table lists patients who will not receive the invitation, with a 'View Status' button highlighted in red.

First Name	Last Name	Date of Birth	NHI Number	Is Registered	Status Description
SUSIE	GOOCH-B	12-05-1995		False	6001::Patient Opt Out for Batch Registration
KEVIN	BROWN-B	12-05-1933		False	6001::Patient Opt Out for Batch Registration
HAROLD	KILMISTER	12-04-1965	765765	False	6001::Patient Opt Out for Batch Registration
JOHN	WILLIAM-B	11-01-1977		False	5001::Invalid Email Address

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



The screenshot shows the confirmation message and patient list after sending batch emails. At the top, there are 'Export to Excel' and 'Export to PDF' buttons. Below, a table lists the patients who were invited, with a 'Send Batch Emails' button highlighted in red.

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 Registration
KEVIN BROWN-B	B000028P@mmh-demo.com	12-05-1933		False	6001::Patient Opt Out for Batch Registration
HAROLD KILMISTER	kmvm06@mmh-demo.com	12-04-1965	765765	False	6001::Patient Opt Out for Batch Registration
JOHN WILLIAM-B	B798 P@mmh-demo.com	11-01-1977		False	5001::Invalid Email Address

Showing 1 to 4 of 4 entries

**Send Batch Emails**

**Batch Emails are Sent.**



" # \$ % & ! ' ( ) \* \$ # \$ \* + ( ! , ! - & . ! / # \$ \* . ( \$ ! 0 1 2 . 3 \* . ( % . !

**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,

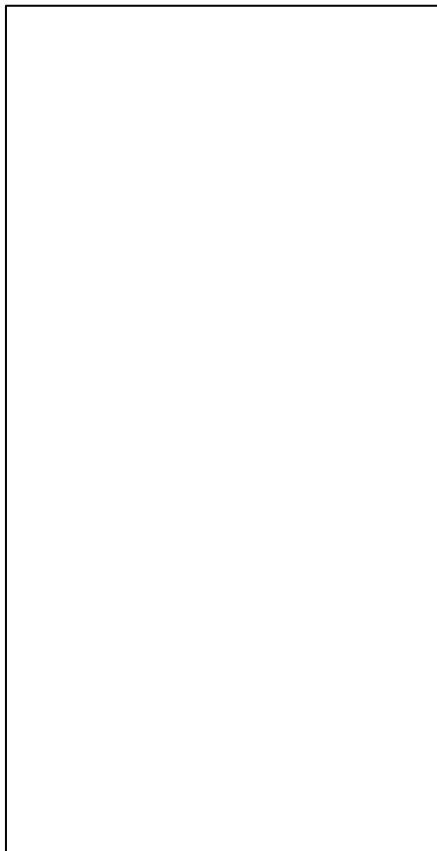
---

### 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

Date of birth

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