

Running the Batch Invitation Utility – Medtech32

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 drop down menu:



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	Patient Surveys	
	🕅 Health Programs	
	E Reception Inbox	
	Medication Management	

2. Select the 'Patient Tools' icon:





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

W my health	Health Tools
Launch Batch Invitation Utility	Brain Injury Screening Tool
	Appointment Pre-Screening for Coronavirus

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	
Batch invite eligible patient	ts to join Manage My Health Millstone Family Practice	Opt-out List Refresh
PreCheck Information Exyldoxing Lience Managelay-leadin Parlam Parlam Parlam Parlem Panding Registration: 5	Health Record Upload Settings Health Summary 2014 Classifications 2014 C	Services Club Revelts 1980 Jan 01 Consultations Consultations 1980 Jan III
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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'.

		Patient batch invitation	
	Batch invite eligible patients	s to join Manage My Health	Opt-out List Refrest
	VM 06	Millstone Family Practice	
PreCh	eck information	Health Record Upload Settings	
	EasyBooking Licence	Health Summary	Services
õ	ManageMyHealth Patient Portal Licence	Ver Classifications	Recalls
õ	Patient Pending Registration: 5	Medical Warnings	Consultation
	Patients Registered in MT32: 1977	Patients Registered but not activated in MMH: 87	0
	Patients Pending to be Registered in MMH: 975	Patients Activated in MMH: 126	
	Sibled number of record	ts for batch processing: 50 💌	



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

	Batch invite eligibl	e patients to join Manage My Health VM 06 Millstone Family Practice	<u>Opt out List</u> <u>Refresh</u>
PreCh	eck Information	Confirm x ng:	Services
Ø	EasyBooking Licence	Clicking 'OK' will register all the non-registered	Lab Results 1980 Jan 01
Ø	ManageMyHealth Patient Portal Licence	Do you want to continue?	Recails
0	Patient Pending Registration: 5		Consultations 1980 Jan 01
	Patients Registered in MT32: 1	OK Cancel n M	IH: 870
	Patients Pending to be Registered in N	HE: 975 Patients Activated in MMH: 126	
	Selec	t number of records for batch processing: 60 V State Age Under 18	
		Validate Patients - Step 1 of 2	

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

		VM 06 Milistone Family Practice	
PreCh	eck Information	Health Decord Upload Setti	
	EasyBooking Licence	ManageMyHealth Datch Invitation	X Services
Ø	ManageMyHealth Patient Portal L or	Batch Invitation Process Completed	Recalis
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		Belect number of records for betch processing. 50 V Exclude Age Under 18	
		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:

PreCh	eck Information	Health Record Upload Settings -	
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	e ex	Process Batch Invitation	
	Total	No of records for Batch processing: 5	
		100%	
0	Patient V	alidation Complete - Please go to step 2	
N	io of Records Registered: 1 Vicw Status	No of Records Failed: 4 View Status	





a. 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:

Send Batch Emails - Step 2 of 2				Send Batch Emails - Step 2 of	2	
No of Records Registered, 1 View Status No of Records Field, 4 View Status		Showing 1 to 1 of 1	Tentres			First Previous 1 Next Last
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		Patient No	me Email Address	Date of Birth NULLNamber	Is Registered	Status Description
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Process Batch Invitation		No of R	ierords Registered: 1 Victor State	No of Records Failed: 4	View Status	
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-PreCheck Information	- Services		Private Branchandia MT21-1077	Dataste Douistand hat	and a state of the Latence of	170

b. 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.

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Select number of records 1	k / ge Under 19						
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Patient Validation Complete - Please go to step 2							
No of Records Registered: 1 View Glatus	No of Records Falled: View States						
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No of Records Regi	stered. 1 Vicw	Status No e	I Records Failed, 4	View Status			
			0				
Expert is Exact Expert is P					Boarch:		
Patient Name	Email Address	Date of Birth	NHI Number	Is Registered	Status Description		
SUSE MARIE COOCIHE	B000731P@mmh- demo.com	12-05-1985		Гаїва	6001: Patient Opt Out for Batch Registration		
REVIN BROWN B	8000023P@mmh demo.com	12 05 1933		False	6001: Patient Opt Out for Batch Registration		
HAROLD KILMISTER	lenvin06gmmh- deno.com	12-04-1985	/05/65	False	6001. Patient Opt Out for Balch Registration		
JOHN WILLIAM-B	R758 P@mms- demo.com	11-01-1977		Faite	5001 rinvalid Final Address		
Rowing 1 to 4 of 4 entries First Providers 1 Next Last							
Send Datch Emails - Stan 2 of 2							

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

			0		[
Export to Excel Export to P Patient Name	Email Address	Date of Birth	NHI Number	Is Registered	Search:	Description	
SUSIE MARIE GOOCH-B	B000731P@mmh- demo.com	12-05-1995		False	6001::Patient Opt	Out for Batch Regi	stration
KEVIN BROWN-B	B000028P@mmh- demo.com	12-05-1933		False	6001::Patient Opt	Out for Batch Regi	stration
HAROLD KILMISTER	kmvm06@mmh- demo.com	12-04-1965	765765	False	6001::Patient Opt	Out for Batch Regi	stratior
JOHN WILLIAM-B	B798 P@mmh- demo.com	11-01-1977		False	5001::Inva	lid Email Address	
howing 1 to 4 of 4 entries					First Previous	1 Next	Las
		Send	l Batch Emails				
		Ba	tch Emails are Sent				



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

Batch Registratio	ON TROM PMS to MMH	Opt-out List Ref
PreCheck Information	Health Record Upload Settings	5
EasyBooking Licence	Health Summary	Services M Lab Results 1980 Jan 01
ManageMyHealth Patient Portal Licence	 ✓ All Medications ✓ Immunisations 	Recalls
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	
Select number of red	cords 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	on from PMS to MMH	Opt-out List Refr		
Medical Centre				
PreCheck Information	Health Record Upload Settings Health Summary	Services ✓ Lab Results 1980 Jan 01		
ManageMyHealth Patient Portal Licence Patient Pending Registration: 0 (No record found)	 ✓ All Medications ✓ Immunisations ✓ Medical Warnings 	Consultation Consultation IP80 Jan 01		
Patients Registered in Evolution: 1 Patients Pending to be Registered in MMH: 1	Patients Registered but not activated in MMH: 0 Patients Activated in MMH: 0			
Select number of re	cords for batch processing: 50 V 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:

	Street Suburb City 1010
	253234234
Dear Jenny,	
You are receiving patient with this m	this email on behalf of VM03Location, as you are an enrolle edical centre.
VM03Location has portal to connect online services su access to certain I	is selected Manage My Health as service provider for their secur online with you. This portal will enable your practice to delive uch as request repeat prescriptions, appointment bookings an realth records directly to you via your computer or mobile phone.
Who is Mana	ige My Health?
Manage My Healt Health is committe by most medical information about here.	In is the leading New Zealand owned patient portal. Manage M ed to helping kiwis improve their health and weilness, and is use certifies with over 1 million users across New Zealand. For more Manage My Health and the services that are offered, please <u>clic</u>
Sign me up!	
In order to take ac account. To conti choose a secure p	tvantage of these services, you must create a Manage My Heal nue, click the 'create account'icon below.You will be asked assword.
	CREATE
For more inf	ormation?
The privacy and assured that non- portal unless you information on Ma If you are not the address has chan	security of your data is of utmost importance to us. Please to of your data will be available in the Manage My Health patie consent and agree to create an account. Please click for mo nanage My Health's <u>privacy policy</u> and/or <u>terms and centitions</u> intended user or wish to notify your medical centre that your emi ged, please contact your health centre.
If you take no fu patient portal. Alte on this, please <u>cli</u> longer be able to decision	inther action, no account will be created in Manage My Heal smatteely, you can opt out of this system allogether. If you decide ck.here to opt out now. However please also note that you will n connect online to your doctor through this system if that is yo
Please contact V!	M03Location for more information on this service.
	www.managemyhealth.



- 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				
â				
Your password must contain: Minimum 10 characters, 1 Uppercase letter, 1 Lowercase letter, 1 Number				
Confirm password				
a				
O 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