

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.

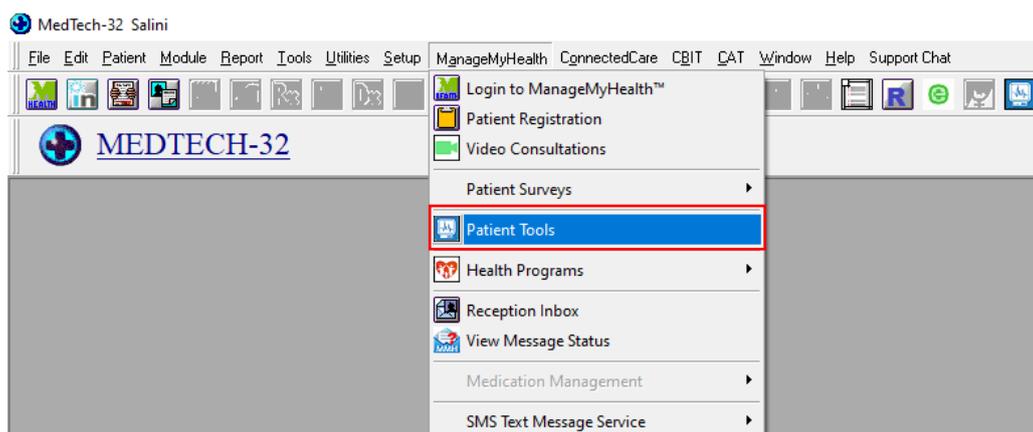
Eligible Patients

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:



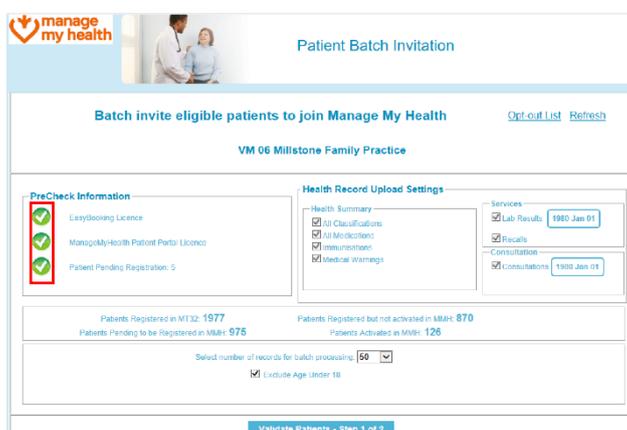
2. Select the 'Patient Tools' icon:



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



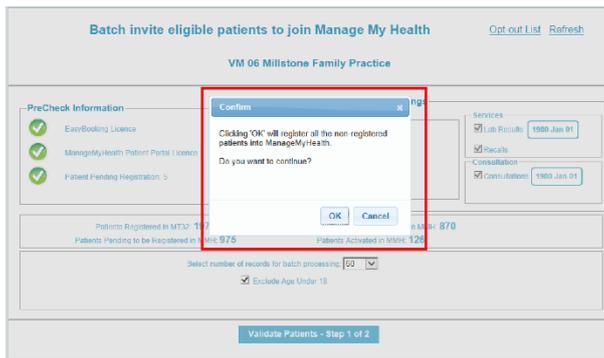
- Ensure you have three green ticks on the left-hand side. You cannot proceed with running the utility if these are not green. If this is the case, please contact your account manager for support.



- 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'.



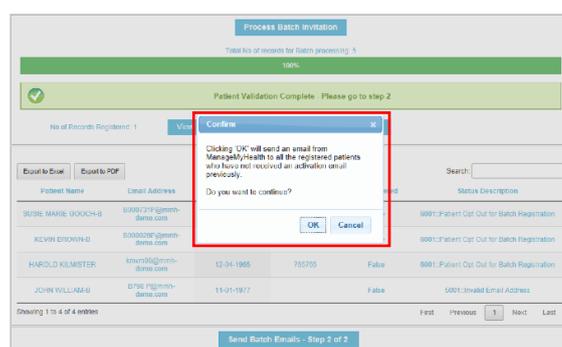
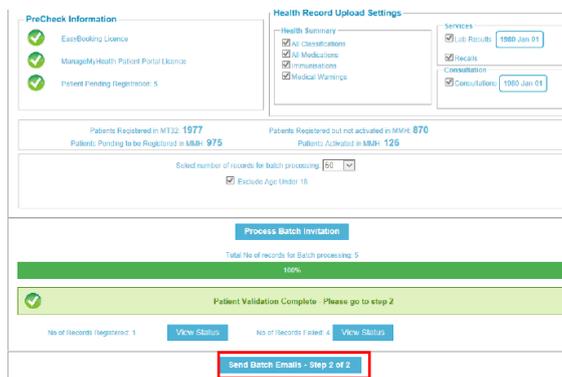
6. Confirm by clicking 'OK' to the confirmation message that appears:



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

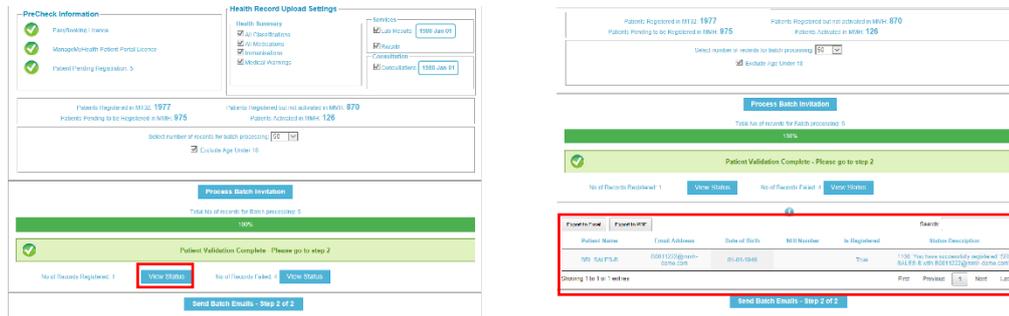


8. You will then be taken back to the main screen, where you need to click the 'Send Batch Emails – Step 2 of 2' button:



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:



Patients Registered in MTC: 1977
Patients Pending to be Registered in MTC: 975

Patients Registered but not activated in MTC: 870
Patients Activated in MTC: 126

Selected number of records for batch processing: 50
Exclude Age Under 16

Process Batch Invitation
Total No of records for batch processing: 5

100%

Patient Validation Complete - Please go to step 2

No of Records Registered: 1
View Status
No of Records Failed: 0
View Status

Send Batch Emails - Step 2 of 2

Patient Name	Registration	Email Address	Date of Birth	NHI Number	Is Registered	Status Description
1991 Joe Pugh	0001002@mmh-demo.com	01-01-1991	True	1700: You have successfully registered 1000 records. It will be 0001002@mmh-demo.com		

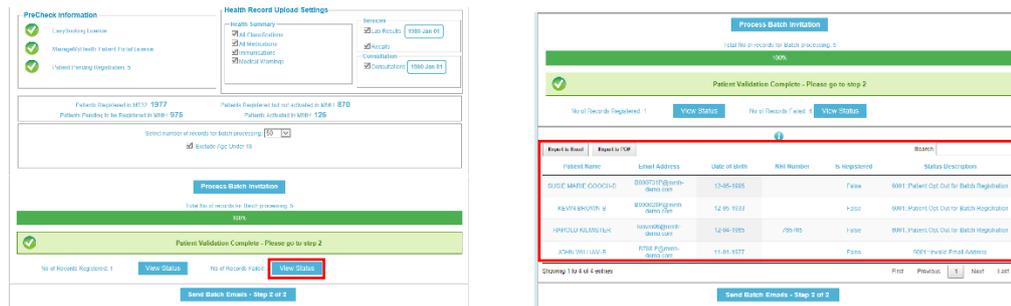
Showing 1 to 1 entries

Send Batch Emails - Step 2 of 2

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.



Patients Registered in MTC: 1977
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Selected number of records for batch processing: 50
Exclude Age Under 16

Process Batch Invitation
Total No of records for batch processing: 5

100%

Patient Validation Complete - Please go to step 2

No of Records Registered: 1
View Status
No of Records Failed: 4
View Status

Send Batch Emails - Step 2 of 2

Patient Name	Registration	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 - Step 2 of 2

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



Export to Excel Export to PDF

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 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

First Previous 1 Next Last

Send Batch Emails

Batch Emails are Sent.

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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Health Record Upload Settings

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- 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:

VM03Location
Street Suburb City 1010
253234234

Dear Jenny,

You are receiving this email on behalf of **VM03Location**, as you are an enrolled patient with this medical centre.

VM03Location has selected Manage My Health as service provider for their secure portal to connect online with you. This portal will enable your practice to deliver online services such as request repeat prescriptions, appointment bookings and access to certain health records directly to you via your computer or mobile phone.

Who is Manage My Health?

Manage My Health is the leading New Zealand owned patient portal. Manage My Health is committed to helping kiwis improve their health and wellness, and is used by most medical centres with over 1 million users across New Zealand. For more information about Manage My Health and the services that are offered, please [click here](#).

Sign me up!

In order to take advantage of these services, you must create a Manage My Health account. To continue, click the 'create account' icon below. You will be asked to choose a secure password.

[CREATE ACCOUNT](#)

For more information?

The privacy and security of your data is of utmost importance to us. Please be assured that none of your data will be available in the Manage My Health patient portal unless you consent and agree to create an account. Please [click for more information on Manage My Health's privacy policy and/or terms and conditions](#)

If you are not the intended user or wish to notify your medical centre that your email address has changed, please contact your health centre.

If you take no further action, no account will be created in Manage My Health patient portal. Alternatively, you can opt out of this system altogether. If you decide on this, please [click here](#) to opt out now. However please also note that you will no longer be able to connect online to your doctor through this system if that is your decision

Please contact VM03Location for more information on this service.

 www.managemyhealth.co.nz

This email was automatically generated. Please do not reply to this email address as all responses are directed to an unattended mailbox and you will not receive a response.

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](#).

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