

# Manage My Health

# Patient & Provider Portal V2

### **General Release Notes**

Version 1.0 | October 2023





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# **1** Introduction

We're delighted to introduce a range of new features and improvements in this update to the Manage My Health portal. Designed to enhance the experience for both providers and patients, the system has been streamlined for easier navigation. Several new options have also been incorporated for added convenience.

# 2 Summary of Releases

Common changes to Provider and Patient Portals	Login with OTP
What's new in the Provider Portal	<ul> <li>User interface for configuring appointment reasons</li> <li>Location wise merchant account setup</li> </ul>
What's new in the Patient Portal	<ul> <li>Provisions to capture additional notes for appointment booking</li> <li>Secure message terms and conditions</li> </ul>
Upcoming features	<ul> <li>Close account</li> <li>Availing flexible appointment options</li> <li>Video enhancements in PMS (Webforms)</li> <li>Self-check in</li> </ul>



# **3** Common changes to Provider and Patient Portals

#### A. Login with OTP

With the new 'Login with OTP' feature, users can now even log in using a One-Time Password (OTP) sent to their registered email address in case they forget their password.

Users can click on the Login with OTP option on the Sign-in page.

Sign in Don't have an account? Sign up now	$\mathcal{D}$	
Email Address*	0	
Required		
Password*	8	
Forgot your password? Reset it now o <mark>login with OTP  Remember my email address </mark>	₽	
SIGN IN		
SIGN IN OR OR		lave you recently had hingles or chickenpox?
Sign in with OR MY HEALTH ACCOUNT To Whatu Ora Health Her Careful OR OR		lave you recently had hingles or chickenpox? Your plasma could help nake a lifesaving treatment.
SIGN IN OR Sign in with MY HEALTH ACCOUNT Te Whatu Ora Health ACCOUNT OR OR LOG IN AS A PROVIDER INSTEAD	JOIN MEETING	lave you recently had hingles or chickenpox? Your plasma could help nake a lifesaving treatment.

In the subsequent screen, the user needs to ensure the registered email address is correct and then click on **Continue**.

$\diamond$		•
	Please enter your registered email address	
	Cemail Address* 7gp1@mmh-demo.com	
	CONTINUE	

The system then produces a secure OTP and send it to the user's email. Upon receipt, the user must type the OTP and click **Verify**. The system further verifies the OTP for accuracy and expiration.



\$
OTP Verification
Enter the 6-digit OTP code sent to your email address (7gp1@mmh-demo.com).
Verification code *
OTP has been generated with validity of 30 minutes Still idin't get the OTP? Resend OTP
VERIFY GO BACK

If the correct OTP is provided within the pre-set time limit, the user can access their MMH account. In case the need arises, the user can request a resend of the OTP. However, for security purposes, making multiple requests within a brief period is limited.

In the event of an incorrect OTP or email address entry, the system will display pertinent error messages, offering guidance on the next steps.



# **4** What's New in the Provider Portal

#### A. User interface for configuring appointment reasons

In the previous version, appointment reasons were pre-set and un-configurable. Practice Administrators now can tailor this field to their needs.

They can introduce new reasons, modify existing ones, and deactivate those that are no longer in use, all through a user-friendly interface.

To get started, navigate to **Setup Modules**, and select **Appointments**. From there, click on **Appointment Reasons** located at the top.

On the left-hand side, a list displaying all the presently defined appointment reasons can be found.

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My Appointments		Information				
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Reporting	~	VM04Practice		~	Health Centre	
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Appointments	- 1	Joint Pain			Appointment Re	ason*
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Repeat Prescriptions		Skin Disorders				
🕊 Recalls						
Linked Accounts		L			1	SAVE CANCEL
Health Diary						

#### 1. Add Appointment Reason

To introduce a new reason, pick the relevant practice from the Health Centre drop-down, then enter the new reason in the **Appointment Reason** field.

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🕻 Recalls				C2 🛱	
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A Health Diary				*	
SMS	_				

Please click on the **Save** button once done.

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#### 2. Editing Existing Appointment Reasons

To edit an existing reason, click on the **Edit** icon against the reason to be edited from the list on the left section.

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Repeat Prescriptions							
K Recalls							
Linked Accounts						SAVE CANCEL	
A Health Diary							

The details will be displayed in an editable mode in the section on the right side.

I manage my health							🔳 🖸 🌏 SIGN OUT (646)
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Repeat Prescription:	s				L		
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Linked Accounts							<i>(</i>
Health Diary							

Update the necessary information and click on the **Update** button.

#### 3. Delete Existing Appointment Reasons

Users have the option to delete reasons that are no longer required.

Click on the **Delete** icon against the reason to be deleted from the list on the left-hand section.





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Repeat Prescription	;	Skin Disorders					
🕊 Recalls							
Linked Accounts						CANCEL	
Health Diary							

Upon clicking that a confirmation pop-up is displayed.

Information	
Do you want to delete Appointment reason?	
YES NO	)

Click **YES** in order to confirm your deletion request.

Following this process will ensure that the particular reason will no longer be available for patients to choose from while booking an appointment.

#### **B. Location wise Merchant Account Setup**

The Location Wise Merchant Account feature allows Practice Administrators to configure merchant accounts specific to individual locations. Earlier, this was only possible at a Health Centre level.

Location-wise Merchant Accounts can be setup and managed as detailed below:

- Click on Setup Online Payments and then click on Payments.
- Select the Merchant Account Set-up tab
- Go to the Account Setup tab under this
- On the left-hand side, a list of all locations associated with the practice are displayed



MERCHANT AC SETUP ONLINE PAYMENT SETTINGS
Merchant AC Setup
Step 2
Terms and Conditions:
1. The Manage My Health Payments feature and service (Payments Service) requires a Windcave New Zealand Limited Merchant Account (Merchant Account) for receipt of payments from users.
2. The Manage My Health Payments Service is subject to the Manage My Health Terms of Use and the Windcave New Zealand Limited is company incorporated in New Zealand icompany number 5915840). Terms and Conditions (which are either provided to you by Windcave New Zealand Limited when you apply to open a merchant account with them or which can be found online at https://www.windcave.com/terms/sconditions/
3. The Manage My Health Payments Service incurs a S50 (excl. GST) monthly service fee and \$0.50 (excl. GST) per transaction service charge for each payment transaction. These service charges will be invoiced monthly by Manage My Health Limited.
4. The Windcave Merchant Account incurs merchant fees which are charged directly by Windcave New Zealand Limited and will be advised at the time of completing the application form for the Windcave Merchant Account.
5. By selecting "Activate" and choosing to activate the Manage My Health Payments Service with the Windcave Merchant Account, you acknowledge and accept the service charges for the Manage My Health Payment Service and merchant fees for the Windcave Merchant Account.
6. Please enter the details provided by Windcare in the below field. Puby enables Account2Account payment method for repeat prescriptions only. PuPots Is necessary to enable credit card payment service for repeat prescriptions and appointments. Select the Activate button to activate the Manage My Health payment service with Windcare Merchant Account
r Halth Cette
VM04Practice Copy from other location
Trading Name* Customer id*
VM44.ocation2
VMG4Protice PsPay Key*
no12 bay road brown beach central Auckland 1009
Initial Windcave Account Password

- Please click on the **Edit** button against the location for which Merchant Account needs to be configured
- The right-hand side panel will display fields for configuring the merchant account

- Hardh Castra		
VM04Practice	~ )	Copy from other location
		Trading Name*
VM04Location2	ď	PsPay User Id*
VM04Practice no12 bay road brown beach central Auckland 1009	Activated	PxPay Key*
		Initial Windcave Account Password
		Pofet Useraine
		Physic Password
		Activate     Inactivate
		VALIDATE VALIDATE & SAVE CANCEL

- Fill in the necessary merchant account details
- Once done, click on the Activate radio button and then click the Validate button
- Once activated, the status of the location will change to Activated
- To inactivate the Merchant Account for this location, the same process as detailed above can be followed and for the last step, the **Inactivate** radio button can be selected

**Note**: Use the **Copy from other location** checkbox to duplicate merchant account details from another location. If there is only one location, this option will appear as disabled.

Each billing transaction (including Appointments and RRP) will be automatically associated with the appropriate merchant account based on the location of the transaction.



# **5** What's New in the Patient Portal

#### A. Provisions to capture additional notes for appointment booking

During the appointment booking process on the portal, patients now have access to an additional text field.

This field allows them to communicate any specific requests they may have for their visit to the practice. This may range from needing a translator or wheelchair to any additional service beyond the standard offerings of the practice.

It is important to note that filling out the Additional Assistance Request field is optional.

Furthermore, any additional assistance requests entered will reflect in the **Appointment Notes** within the Medtech PMS.

I manage my health	🛥 😊 🐖 🛧	SIGN OUT
Dashboard	Schedule your appointment now.	
Messages Repeat Prescriptions My Health Records My Health Indicators My Health Indicators	Appointment Booking Terms         Appointment online         Inttrs://www.ioomc.com/itare/s7aa638106fe44a893be99b774fb65d1         Practice Booking Policy         Your practice allows you to book an appointment with any clinician who is enabled for online appointments.	
<ul> <li>★ Beating the Blues</li> <li>M v Health Documents</li> </ul>	Health Centre     VM04Practice     V	
My Health Centres	(The appointment is for Myself (SHERRY SALES)	-
My Care Plans	Select or type reason for appointment	0
Insurance Details	St ALL O Visit ES Video Phor	ne
Health Diary  Control Discover Health  My Account	Select Provider	
Version 5.3.1	CONFIRM	_

#### **B. Secure Message Terms & Conditions**

Upon sending a secure message from their computer or mobile device, a patient would see a pop-up window with the terms and conditions for the selected service displayed. This enables the patient to promptly review the terms without the need to click on an additional link. This ensures that they have a complete understanding of the terms prior to moving forward.

The pop-up materializes after the patient checks the **I accept** checkbox. Within the Information section of the pop-up, the patient will find:

- Description of the service
- Cost of the service
- Accepted payment methods for the service



Compose Email ① Information By utilizing this service, you have the ability to health centre may have specific terms and con	send secure messages directly to your clinician, which allows for easy communication and ditions regarding message recipients, which may limit who you can send messages to.	exchange of information through Manage My Health. However, it is important to note that your
Health Centre	VM03Location	•
_ Service Name Advise of Changes-P  76p Subject* Advise of Changes-P	Information Use this service to advise your Health Centre of any changes to your contact details '1' Service Cost: S00.00 Payment Method: Pay at Health Center Terms & Conditions We cannot guarantee when we will receive these messages. You will be replied to once we have received your communication IAGREE CANCEL	> the terms and conditions set by your healthcare centre; the messages can only be ers who are listed in the To' drop down.
I agree to the terms 9 conditions         Write your message*         B       I         B       I         U       Format         Thanks & Reparts	= = = ::::::::::::::::::::::::::::::::	
sign Sherry sales		



## **6 Upcoming Features**

#### A. Close Account

Manage My Health offers patients the option to close their accounts if they choose to stop using it.

To begin the closure process, the patient needs to go to the profile screen within MMH and select the **Close Account** option.

After clicking 'Close Account,' a confirmation popup will emerge, detailing the implications of account deletion. To proceed with the closure process, patients must affirm their decision by clicking **'Yes**.' Additionally, the patient is obligated to choose a reason for closing their account from the options provided. The patient needs to choose the most pertinent reason from the list. If the patient opts not to proceed with the account closure, he or she can click 'Cancel' to return to the previous screen.

Following the confirmation of closing the account, the patient's MMH account and the associated data will remain accessible for a period of 72 hours. Within this window, a patient has the opportunity to reconsider their decision and log in to reinstate their account.

If the patient logs in within this 72-hour timeframe, their account will be restored without any loss of data or settings. They can resume using MMH as usual after reactivation.

#### **B. Availing Flexible Appointment Options**

Currently, each appointment session is classified as either face-to-face, video, or phone, as categorized within the PMS.

The Flexible Slot Display feature empowers patients to select appointment slots without being confined to specific consultation modes (Phone, In-person, or Video). Enabling this configuration will present all available slots, granting patients the freedom to choose any suitable slot within their preferred consultation mode.

In the 'Appointment Settings' section, locate the 'Flexible Slot Display' configuration option. By default, this configuration is set to 'No.' To activate it, toggle the configuration to 'Yes.'

Yes O No	0
Flexible slot display	
• Yes O No	0

#### C. Video Consultation Enhancements in PMS

The PMS's Video Consultation improvements enable healthcare providers to efficiently oversee and conduct video appointments directly within their current system.

This guide illustrates the steps for providers to access and initiate upcoming video appointments.

To access the 'Video Consultations' screen, please click on the 'Video' icon within the PMS interface.

On this screen, all the scheduled video appointments for the day will be displayed, mirroring the format seen in MMH video consultations.

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	124		Case ne	

There are two QR codes provided:

• Firstly, the QR code to view upcoming video consultations in mobile browser:



The QR code in the top right corner launches the 'Video Consultations' screen in the mobile browser

V = 🖉 🖸 💭 🗊 🕄	
< Video Consultations	< Video Consultations
Sherry Sales 28 Jun 2023, 12:00 AM	Sherry Sales 28 Jun 2023, 12:00 AM Appointment Time In Join Appointment Source
Ð Ro	Tim Provider Name Mobile
Support   FAQ   Terms of Use   Privacy Policy   Security © 2008 - 2023 Manage My Health Ltd. All rights reserved.	Support   FAQ   Terms of Use   Privacy Policy   Security © 2008 - 2023 Manage My Health Ltd. All rights reserved.

• Secondly, the QR Code to join Video Consultation



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Patient Profile = Video Consultation (Rengelity/in	me (see (s)				· Clinical Dashboard
SASS Service SASS Service SASS Service Service Service Service Service Service Service Service	manage my health	Video Consultations	tea fact		Ven Mon
Arrensen PA. Bindings PA. Bindings Param Marken S. Marken PA. Marken PA.	Appointment Texe 2 2010/2022 & 50 Go a m Showing 1 to 1 of 1 wareau	You are behind on terminal server, you cannot open the video call, Please use this GR code to have a video conference on your mobile	Touris San		Material Tankin         Image: Computer Science           9 (a) an 2020         24 (a) an 2020         24 (a) an 2020           9 (a) an 2020         20 (a) an 2020         20 (a) an 2020           9 (a) an 2020         20 (a) an 2020         20 (a) an 2020           9 (a) an 2020         20 (a) an 2020         20 (a) an 2020           9 (a) an 2020         1 (b) (a) an 2020         20 (a) an 2020           9 (a) an 2020         1 (b) (a) an 2020         (b) (a) an 2020           10 (a) an 2020         (b) (a) an 2020         (b) (a) an 2020           10 (a) an 2020         (b) (a) an 2020         (b) (a) an 2020           10 (a) an 2020         (b) (a) an 2020         (b) (a) an 2020           10 (a) an 2020         (b) (a) an 2020         (b) (a) an 2020           10 (a) an 2020         (b) (b) (b) (a) an 2020         (b) (b) (a) an 2020           10 (a) an 2020         (b)
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Clicking on the green icon generates a QR code for the specific appointment.

Further, scanning this code launches the video call in the mobile responsive screen.





# 7 Self-Check-in

The Self-Check-In feature allows healthcare providers at the practice to offer patients the convenience of checking in on their own before their appointments.

Providers can customize this feature using two settings:

#### A. Enable/Disable Self Check-In

Providers have the option to allow patients to perform self-check-in. When this feature is activated, patients will have a **Self-Check-In** button available on their appointment page.

In contrast, if this feature is deactivated, patients will need to check in using the standard clinic procedures.

#### B. Time Window for Self-Check-In

Providers have the ability to establish a designated time frame prior to appointments during which self-checkin is accessible. As an instance, if this duration is set to 15 minutes, patients can utilize the self-check-in feature within the 15 minutes leading up to their scheduled appointment.

Enable self-check-in button
● Yes O No ①
Number of minutes before a patient can self-check-in
Sumber of minutes

During the appointment booking process, patients now have an option to select their preferred consultation mode (In-person, Phone, or Video). This flexible appointment slot is available only if the practice has configured availability of those slots.

Regardless of the chosen mode, the system will display all available appointment slots.

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B Dashboard	Schedule your appointe	ant now	
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Repeat Prescriptions	VM03Location	<ul> <li>VM03Location</li> </ul>	v
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P the length Decompany	Name is required		
B the line is fractions	Test A Fungus ×	×]©	
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M <sup>e</sup> mealth Tools U			
Ministry Reports			VISIT EDI VIDEO CALL D PHONE
Health Diary			
Discover Health	💄 Luke Wright	Jun 30, 2023	Visit 10:30 AM
Hy Account ~	@ 7gp1		0800AM 0820AM 0820AM
Version 5.0.1	AppointmentsProvider	100 2023 * ( <b>)</b>	09:20AM 09:20AM 09:20AM
		S H T W T F S	09:40AM 09:40AM 09:40AM
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	G BetaProvider1	4 5 6 7 8 9 10	10.000M 10.000M
	BETAPROVIDER2	14 12 13 14 15 14 17	10.20AM 10.20AM 10.20AM
	BTEPROVIDER	н н н н <b>н</b> н	10:40AM 10:40AM 10:40AM
	Cr Sam Eaves		11.00AM 11.00AM 11.00AM
	A Dr. Marcus Williams		
	2 Dr.Balachandran		
	A		
		CONFIRM	
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