



# 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

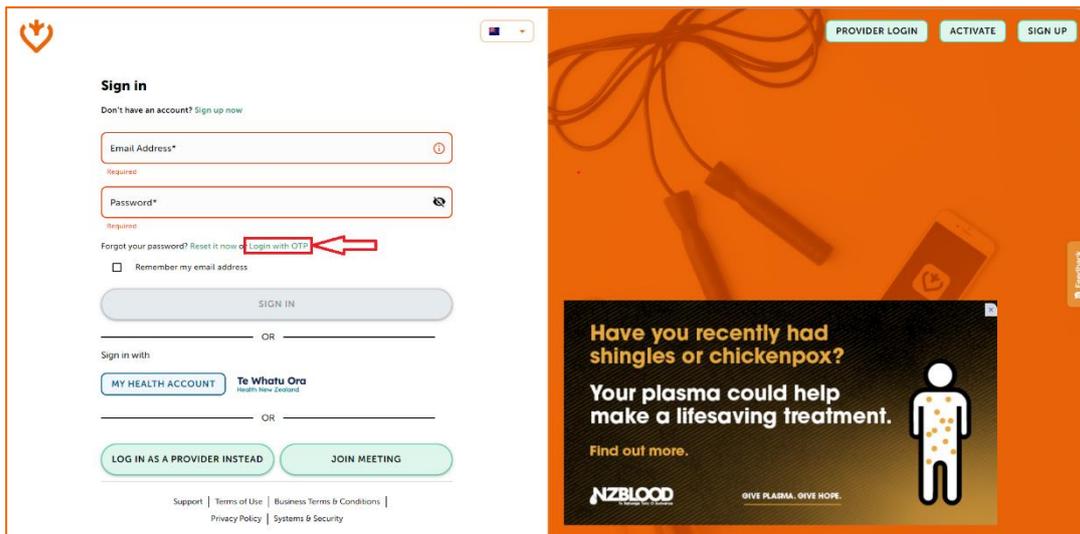
<b>Common changes to Provider and Patient Portals</b>	<ul style="list-style-type: none"> <li>• Login with OTP</li> </ul>
<b>What's new in the Provider Portal</b>	<ul style="list-style-type: none"> <li>• User interface for configuring appointment reasons</li> <li>• Location wise merchant account setup</li> </ul>
<b>What's new in the Patient Portal</b>	<ul style="list-style-type: none"> <li>• Provisions to capture additional notes for appointment booking</li> <li>• Secure message terms and conditions</li> </ul>
<b>Upcoming features</b>	<ul style="list-style-type: none"> <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

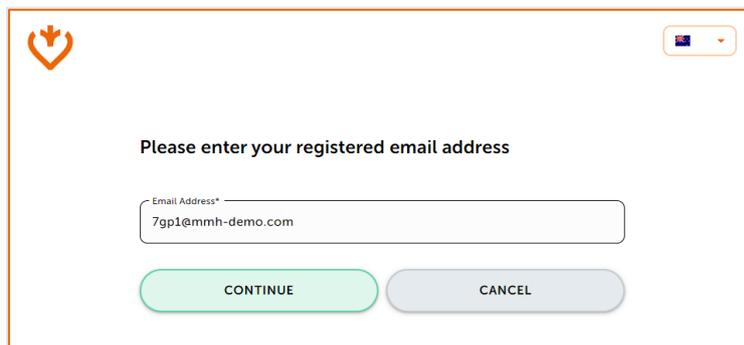
### A. Login with OTP

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.

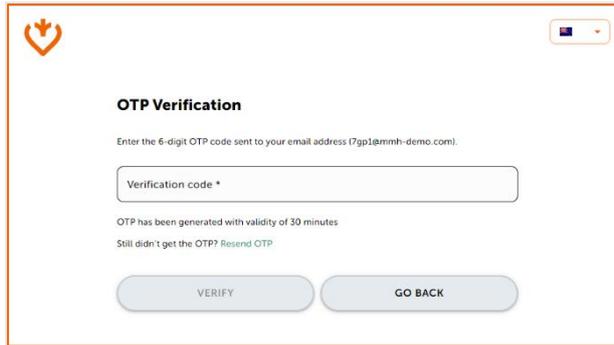
Users can click on the **Login with OTP** option on the Sign-in page.



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



The screenshot shows a web page titled "OTP Verification". At the top left is the Manage My Health logo. Below it, the heading "OTP Verification" is displayed. A message states: "Enter the 6-digit OTP code sent to your email address (7gp1@mmh-demo.com)". There is a text input field labeled "Verification code \*". Below the input field, a message says: "OTP has been generated with validity of 30 minutes". Underneath, it asks: "Still didn't get the OTP? Resend OTP". At the bottom, there are two buttons: "VERIFY" and "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

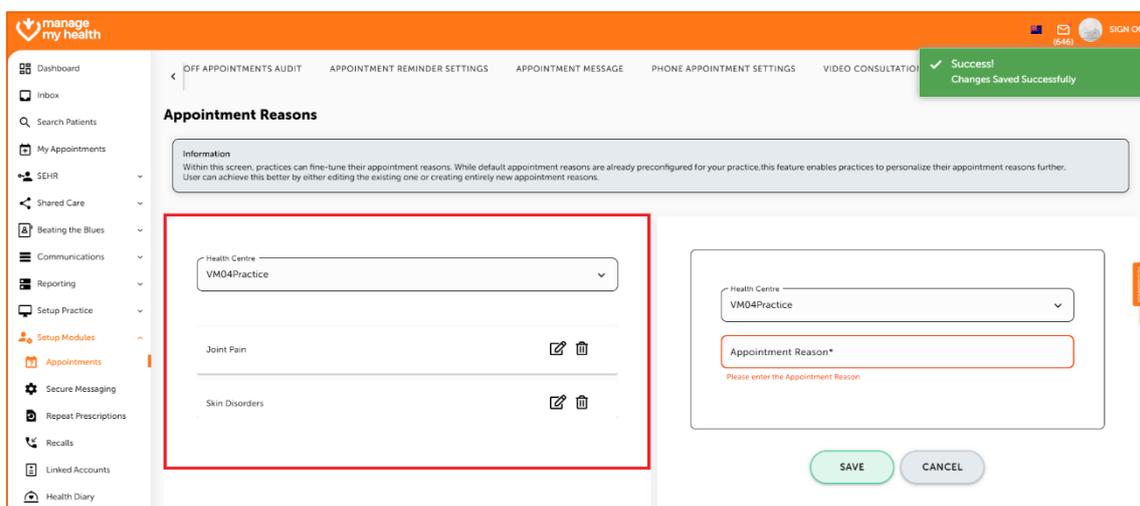
### A. User interface for configuring appointment reasons

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.

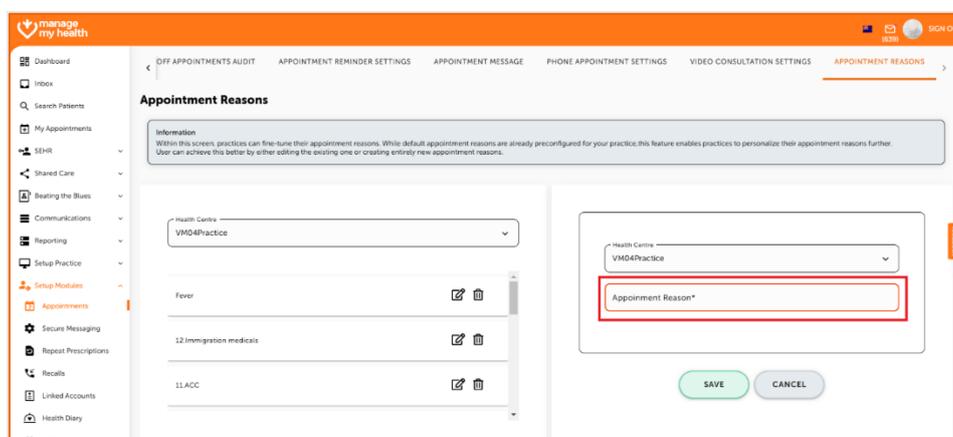
To get started, navigate to **Setup Modules**, and select **Appointments**. From there, click on **Appointment Reasons** located at the top.

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



#### 1. Add Appointment Reason

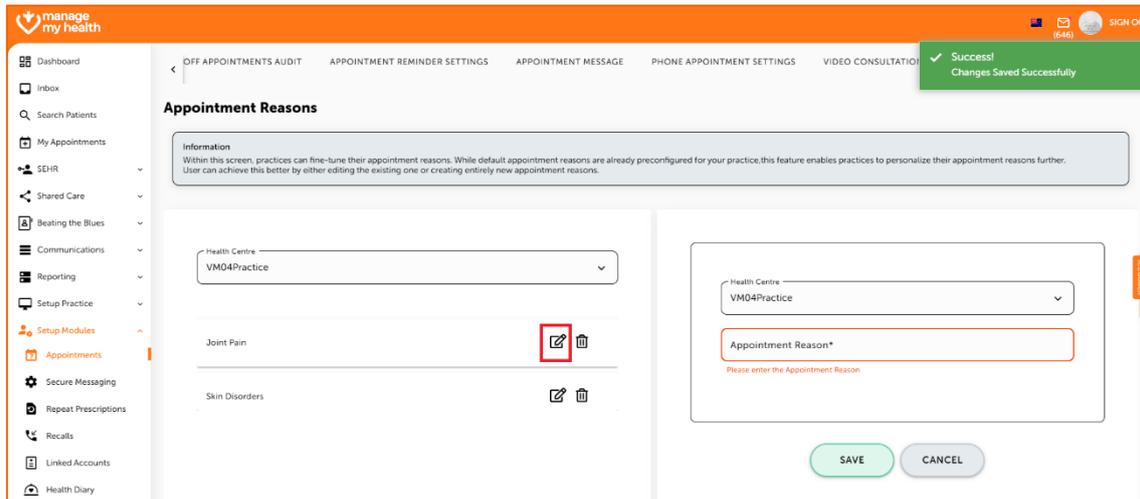
To introduce a new reason, pick the relevant practice from the Health Centre drop-down, then enter the new reason in the **Appointment Reason** field.



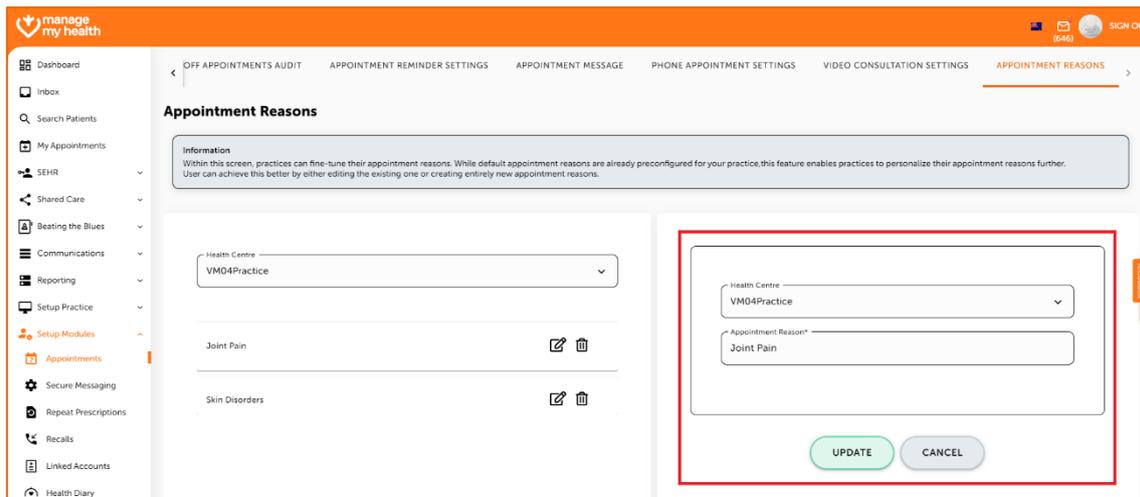
Please click on the **Save** button once done.

## 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.



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

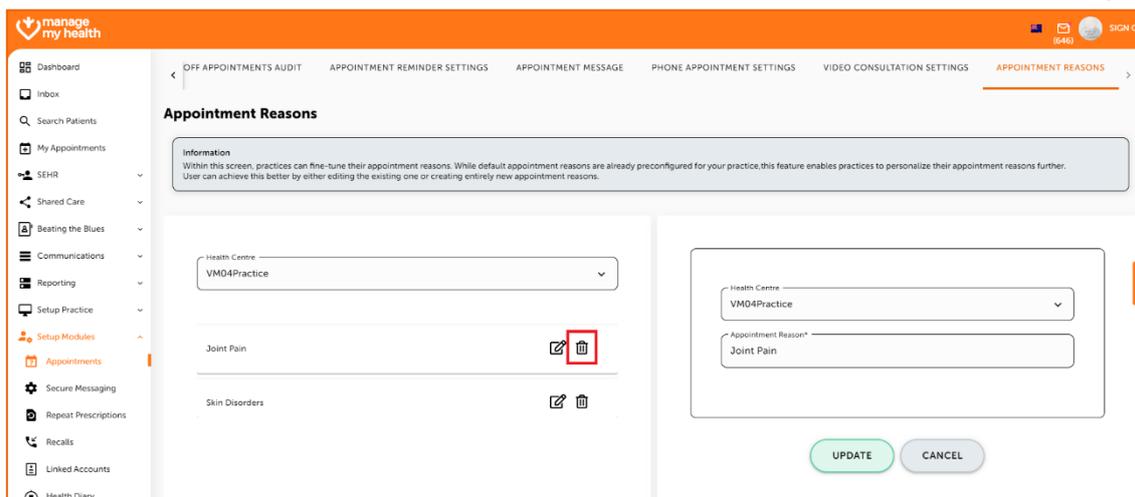


Update the necessary information and click on the **Update** button.

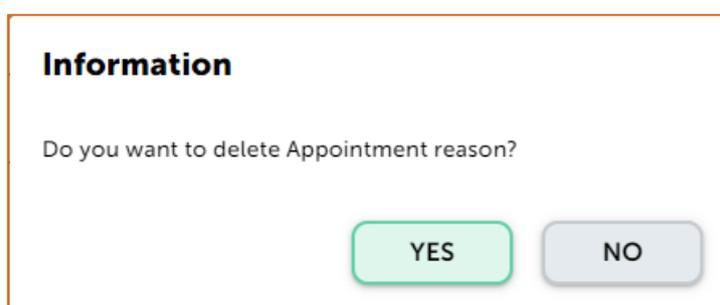
## 3. Delete Existing Appointment Reasons

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.



Upon clicking that a confirmation pop-up is displayed.



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

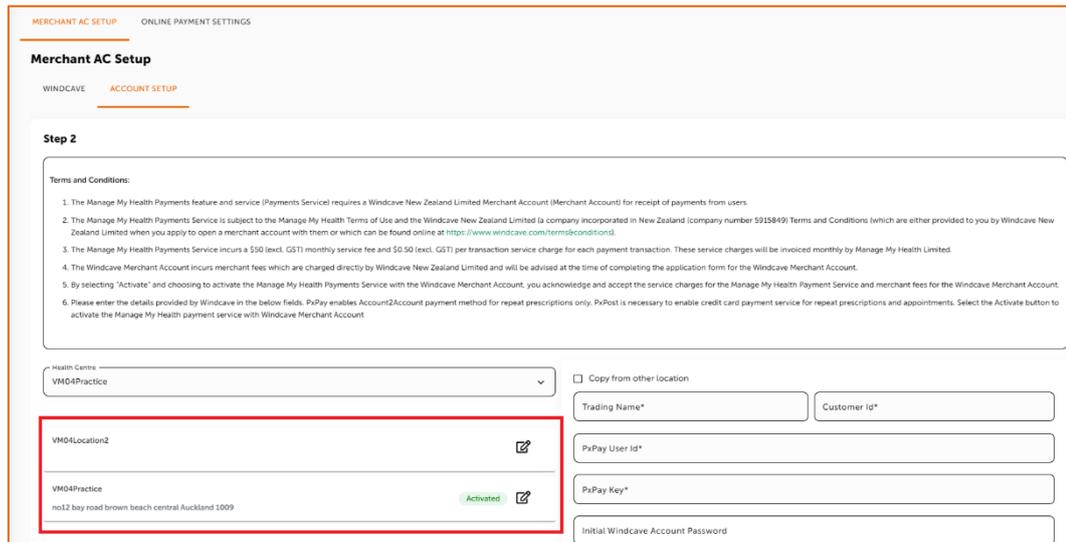
Following this process will ensure that the particular reason will no longer be available for patients to choose from while booking an appointment.

## 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**

WINDCAVE ACCOUNT 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 (a company incorporated in New Zealand (company number 5925849) 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 <http://www.windcave.com/termsandconditions>).
3. The Manage My Health Payments Service incurs a \$50 (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 Windcave in the below fields. PxPay enables Account2Account payment method for repeat prescriptions only. PxPost 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 Windcave Merchant Account.

Health Centre: VM04Practice

Copy from other location

Trading Name\* Customer Id\*

PxPay User Id\*

PxPay Key\*

Initial Windcave Account Password

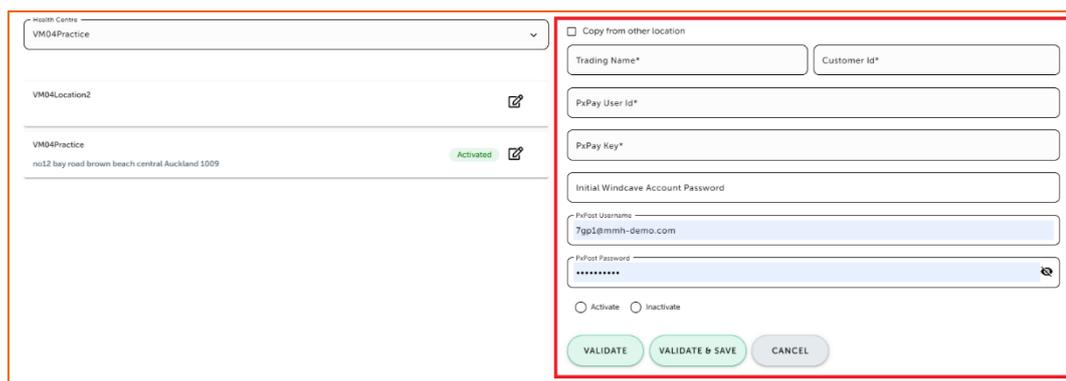
PxPost Username: 7gp1@mmh-demo.com

PxPost Password: \*\*\*\*\*

Activate  Inactivate

VALIDATE VALIDATE & SAVE CANCEL

- 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



Health Centre: VM04Practice

VM04Location2

VM04Practice  
no12 bay road brown beach central Auckland 1009 **Activated**

Copy from other location

Trading Name\* Customer Id\*

PxPay User Id\*

PxPay Key\*

Initial Windcave Account Password

PxPost Username: 7gp1@mmh-demo.com

PxPost 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

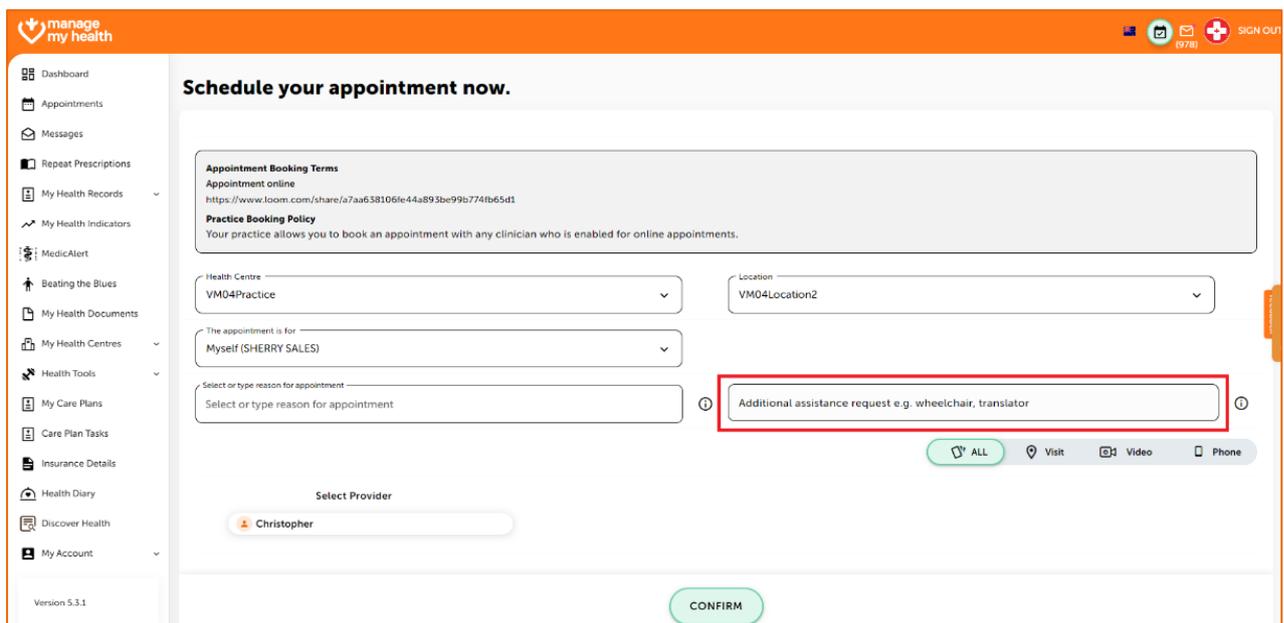
### A. Provisions to capture additional notes for appointment booking

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.



**Schedule your appointment now.**

**Appointment Booking Terms**  
Appointment online  
<https://www.loom.com/share/a7aa6381061e44a893be99c774fb65d1>

**Practice Booking Policy**  
Your practice allows you to book an appointment with any clinician who is enabled for online appointments.

Health Centre: VM04Practice | Location: VM04Location2

The appointment is for: Myself (SHERRY SALES)

Select or type reason for appointment: Select or type reason for appointment

Additional assistance request e.g. wheelchair, translator

ALL | Visit | Video | Phone

Select Provider: Christopher

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** ⓘ

**Information**  
By utilizing this service, you have the ability to send secure messages directly to your clinician, which allows for easy communication and exchange of information through Manage My Health. However, it is important to note that your health centre may have specific terms and conditions regarding message recipients, which may limit who you can send messages to.

Health Centre: VM03Location | Location: VM03Location

Service Name: Advise of Changes-P

To\*: 7Gp1

Subject\*: Advise of Changes-P

I agree to the [terms & conditions](#)

Write your message\*

Thanks & Regards  
sign  
Sherry sales

**Information**  
Use this service to advise your Health Centre of any changes to your contact details \*1\*  
Service Cost: \$500.00  
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

I AGREE CANCEL

## 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.

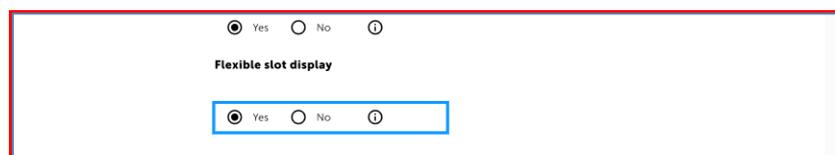
If the patient logs in within this 72-hour timeframe, their account will be restored without any loss of data or settings. They can resume using MMH as usual after reactivation.

### 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.'



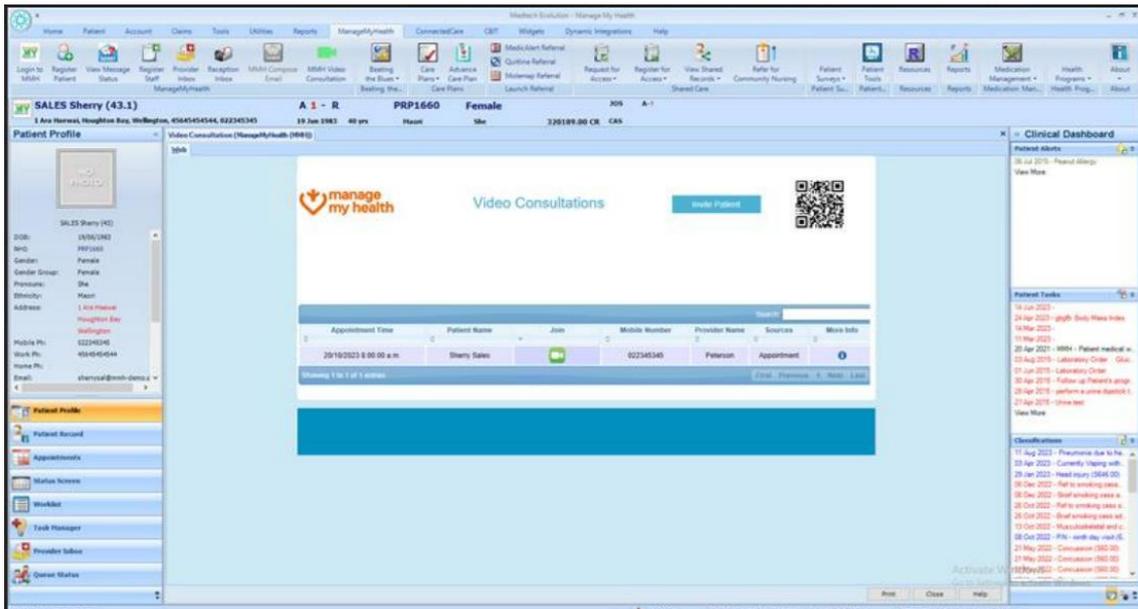
### C. Video Consultation Enhancements in PMS

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.

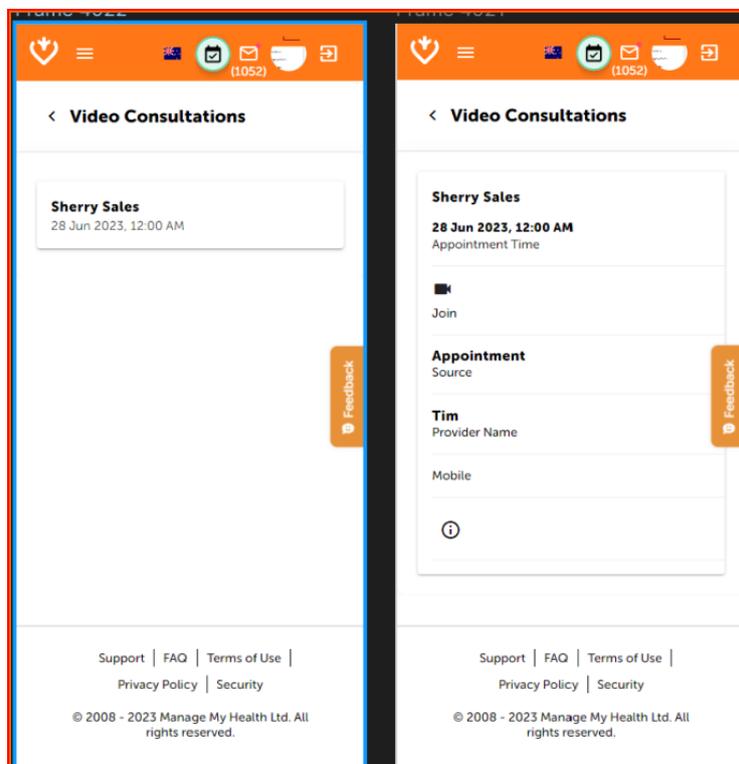


There are two QR codes provided:

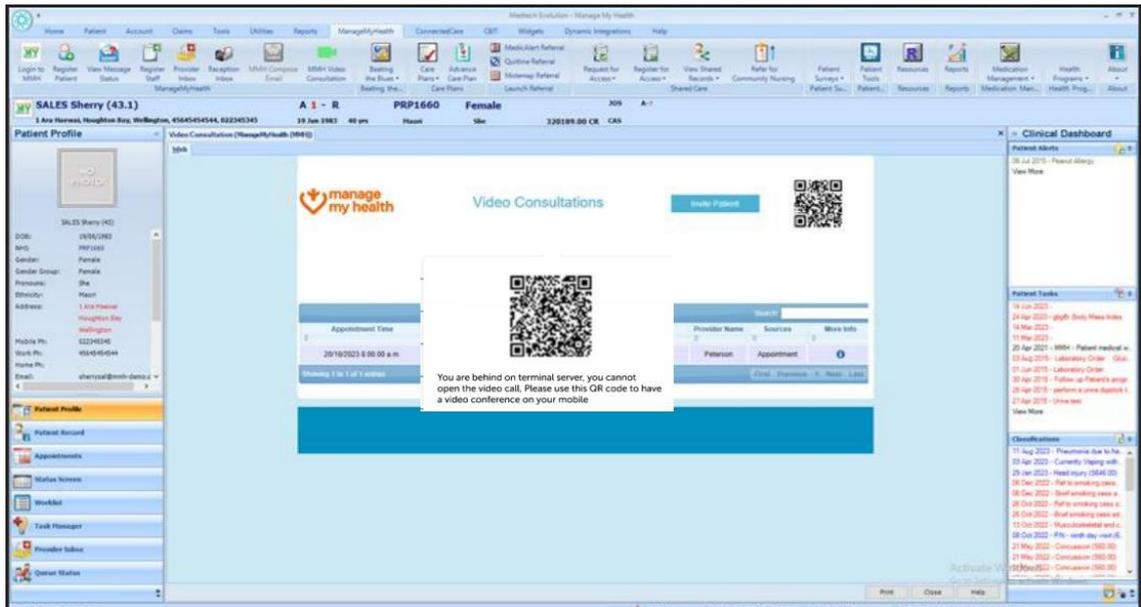
- Firstly, the QR code to view upcoming video consultations in mobile browser:



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



- Secondly, the QR Code to join Video Consultation



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-check-in 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   
  No   
 i

**Number of minutes before a patient can self-check-in**

Number of minutes  i

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.

