manadplus

helping you provide better aged care

Manad Plus

My Health Record (MHR) How-to Guide

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Initial MHR Setup

Introduction

My Health Record (MHR) is a secure online summary of key patient health information.

In an aged care setting, authorised health and care teams can access the system to view and add a resident's information if they have a record. Once connected to MHR, authorised residential aged care staff will have immediate access to key health information.

To register with MHR, you will need to have completed several key steps, including:

- Assign Responsible Officer (RO) and Organisation Maintenance Officer (OMO) roles
- Establish an MHR Security and Access Policy
- If you haven't already, register for Provider Digital Access (PRODA)
- Link Health Professional Online Services (HPOS) to PRODA
- Register seed organisation with the Healthcare Identifiers (HI) Service to receive an HPI-O
- Obtain HPI-Is for all clinical staff who will be uploading to MHR

Note: This is only an overview of some of the steps required to register with MHR. For more information, see the following links.

- MHR Organisation Registration Checklist (.pdf)
- Implementing My Health Record in your healthcare organisation
- Managing the responsible officer and organisation maintenance officers for your organisation

Once you have successfully registered, you will need to request and install a NASH PKI certificate to integrate MHR with Manad Plus. For more information, see:

- NASH PKI certificate
- Installing a NASH PKI certificate

How to register with MHR

The Australian Digital Health Agency has established the **My Health Record Registration (MHRR)** Project to support the aged care sector's universal adoption of digital technology and MHR, which was a recommendation of the Royal Commission.

The Agency will offer Residential Aged Care Facilities (RACFs) hands on support in registering for My Health Record and has commenced contacting all RACFs nationally.

Their Registration Support team is onboard and ready to assist you in connecting all your facilities to My Health Record by providing comprehensive and personalised step-by-step guides to ensure the process is as easy and seamless as possible.

Connecting to My Health Record will help care teams view and share health information about your residents, including their transfer of care, if they are registered and authorised to do so. This can include details of your resident's medical conditions and treatments, medicine details, allergies, and test or scan results.

Once your organisation has completed registration, they will connect you with the Agency's Education team who can work with you to embed My Health Record into business-as-usual workflows. This offer aims to lessen the administrative overhead required during registration and ensures that the benefits of My Health Record can be realised sooner.

To take up the offer of this hands on registration support, please contact:

- MHR.registration.RAC@digitalhealth.gov.au

NASH PKI certificate

MHR considers Manad Plus a **Clinical Information System (CIS)**. Therefore, Services Australia needs to provide your site(s) with a NASH PKI certificate.

The **National Authentication Service for Health (NASH)** is a Public Key Infrastructure (PKI) solution used to access digital health services, including MHR and the **Healthcare Identifiers (HI)** Service.

You can request a new NASH PKI certificate by accessing HPOS via PRODA. Once the request is approved and the NASH PKI certificate is available to download through HPOS, you will receive an SMS to your elected mobile number with a **Personal Identification Code (PIC)**, which is required to activate the NASH PKI certificate. The PIC number will be valid for 30 days.

For more information, see Request, link or revoke your NASH or PKI certificate.

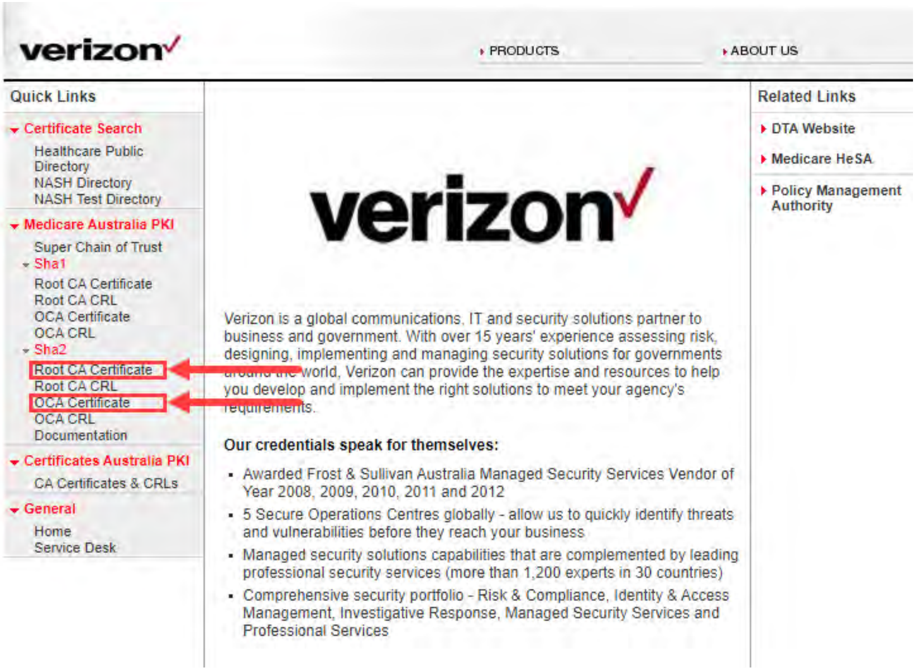
Integrating MHR with Manad Plus

Step 1: Installing a NASH PKI certificate

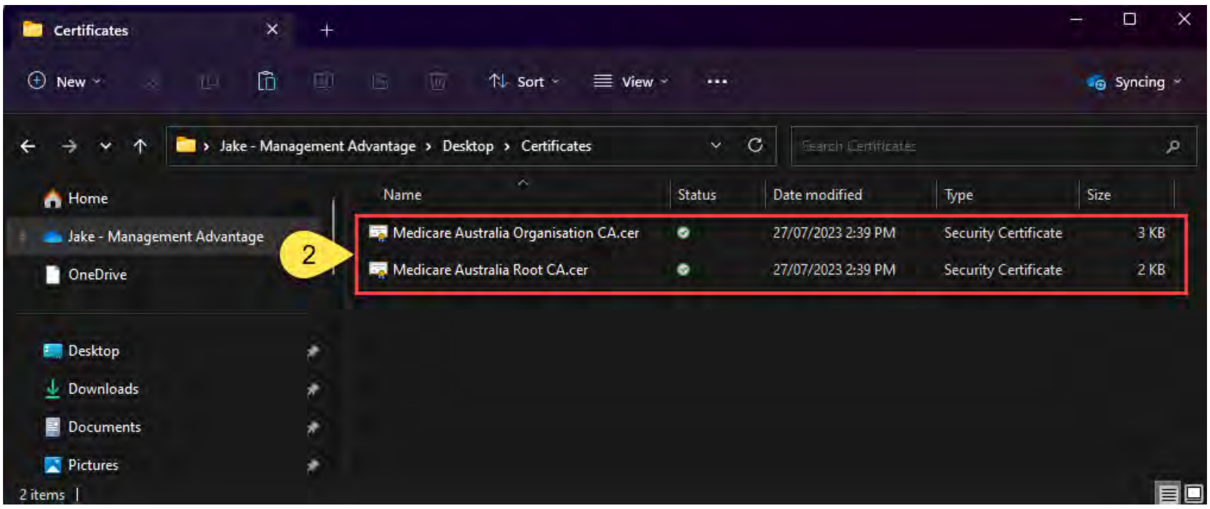
Once you have received your NASH PKI certificate(s) and PIC number, your IT Administrator will need to install all the relevant certificate files on the host server.

IMPORTANT: Ensure you install the certificates on the same server where the Manad Plus Service Manad.Plus.api.exe is running.

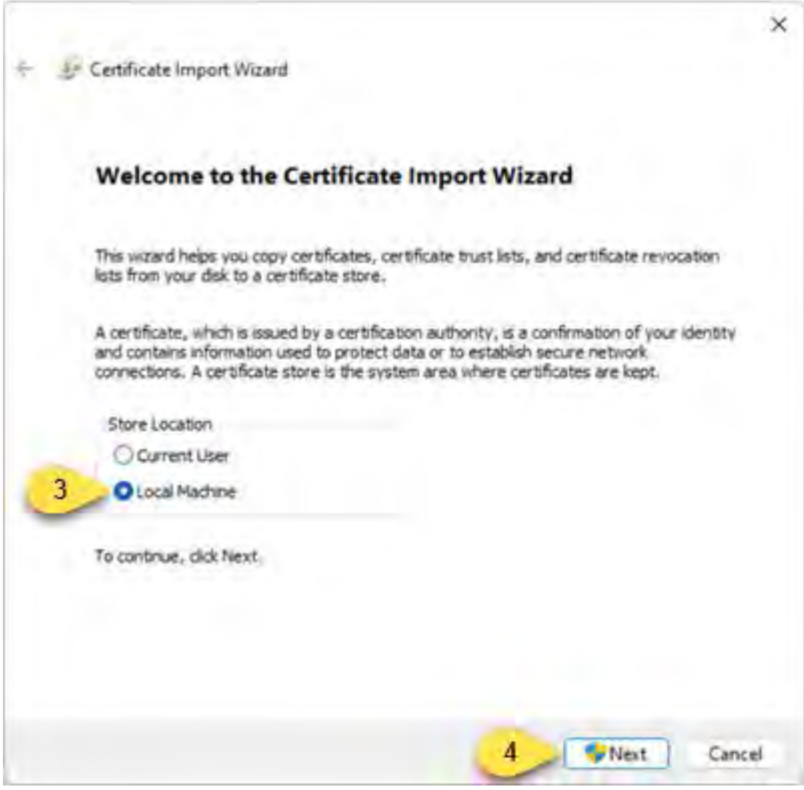
1. You will first need to download the **Root CA Certificate** and **OCA Certificate** from: [Verizon Business / Cybertrust : Certificates Australia (certificates-australia.com.au)](certificates-australia.com.au)



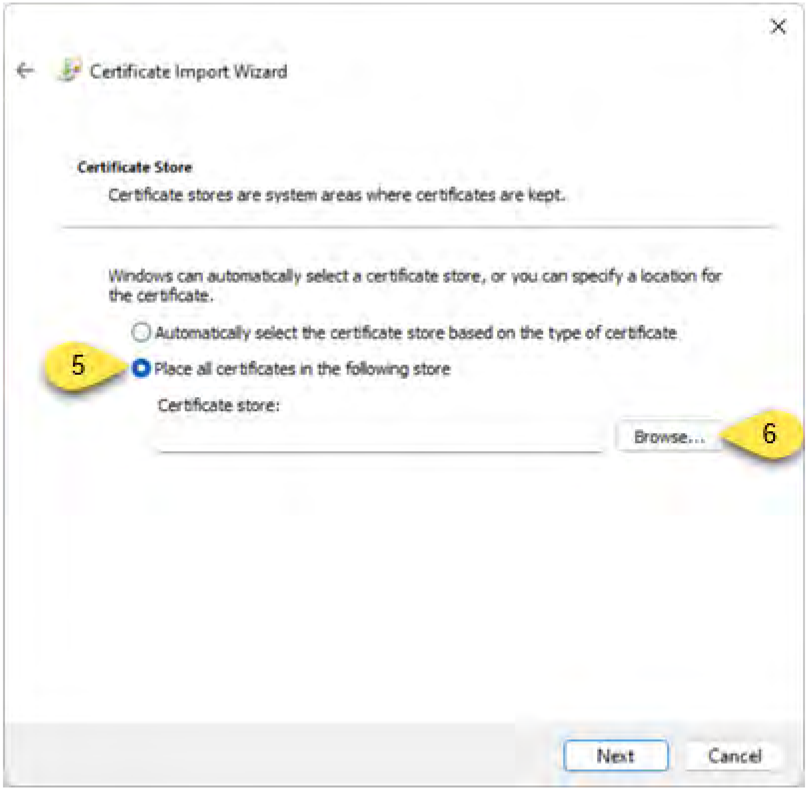
2. Once downloaded Double-click to install the first of the two **Certification Authority (CA)** files.



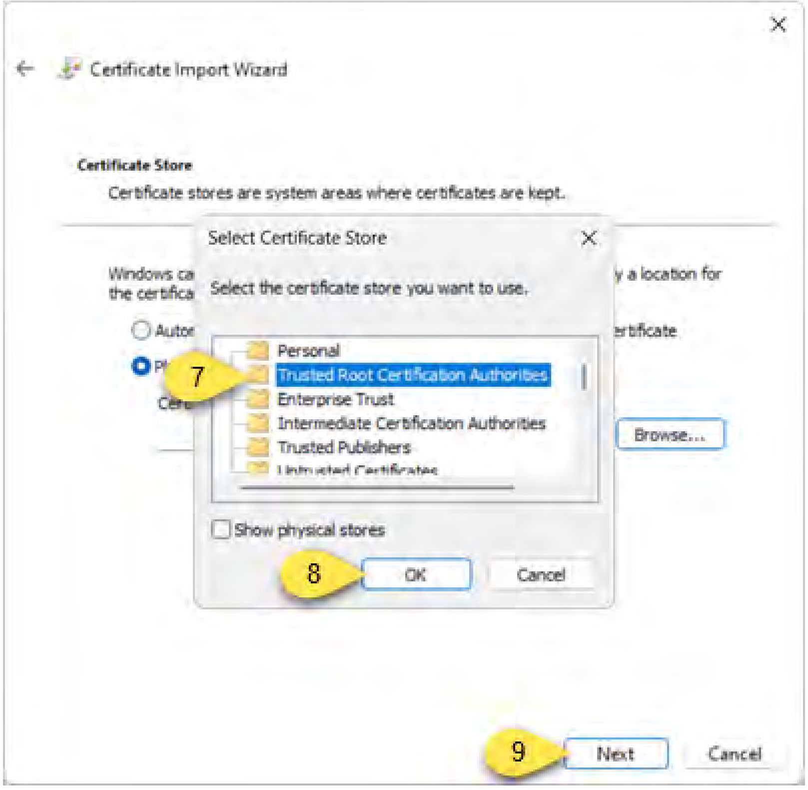
3. Set the **Store Location** as **Local Machine**.
4. Then click **Next** to continue.



5. Select the **Place all certificates in the following store** option.
6. Click **Browse…**

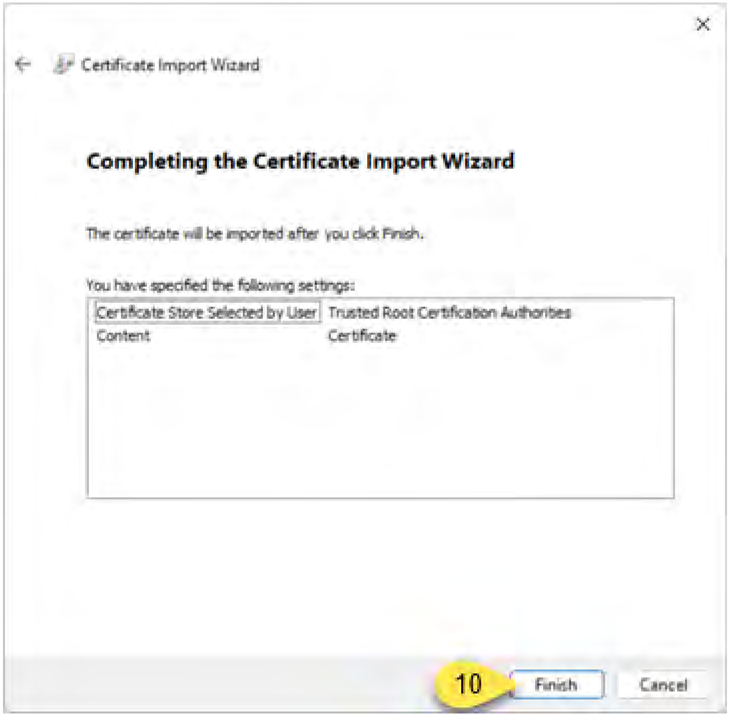


7. Select **Trusted Root Certification Authorities**.
8. Click **OK**.
9. Then click **Next** to continue.

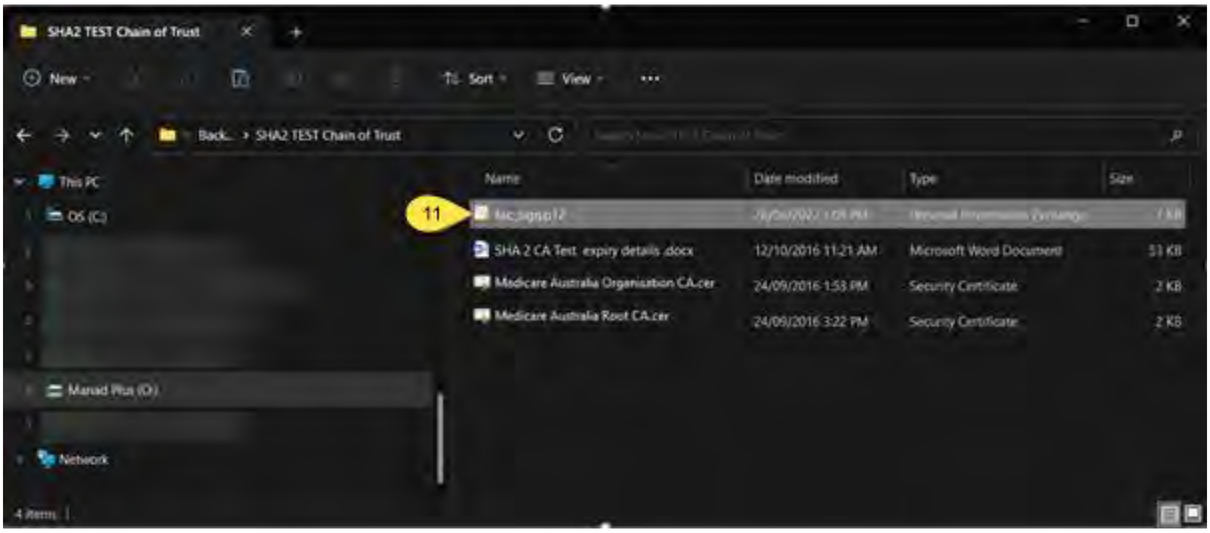


10. Click **Finish**.

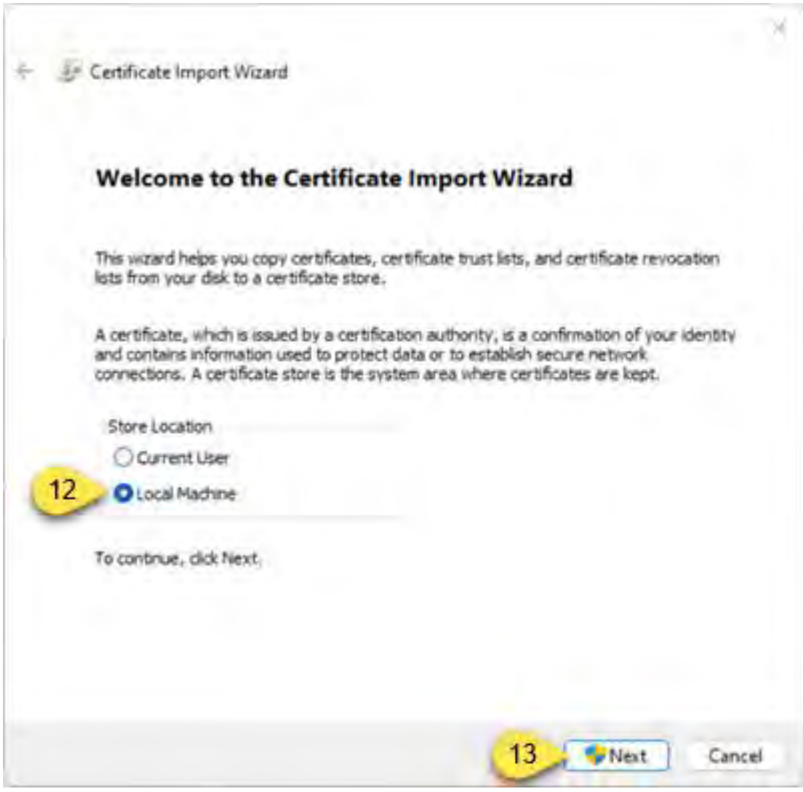
Repeat steps 1-9 for the second **Certificate Authority (CA)** certificate.



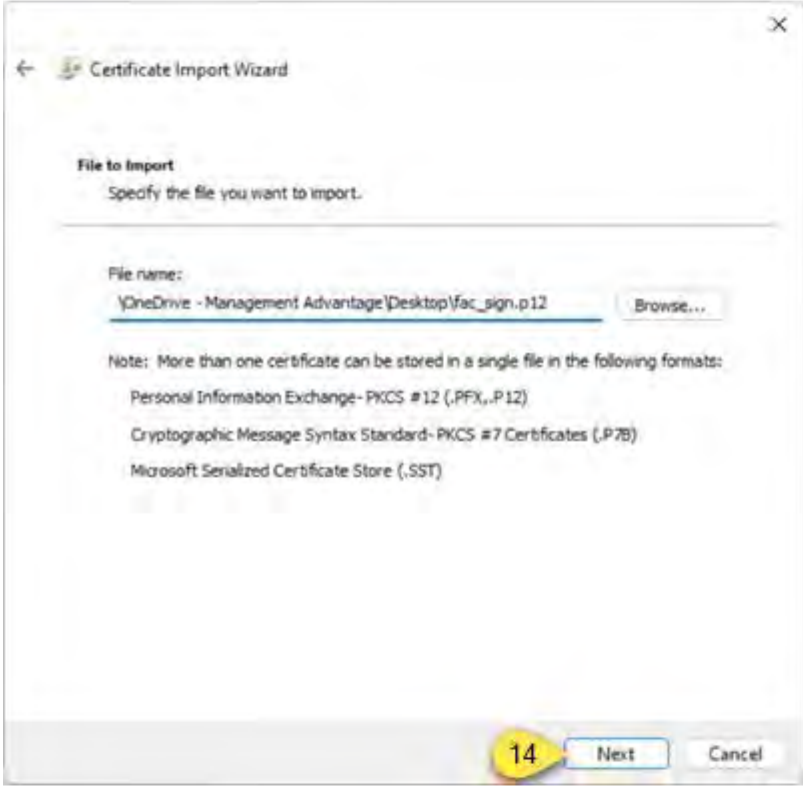
11. Now double-click to install the NASH private key certificate (typically named **fac_sing.p12**).



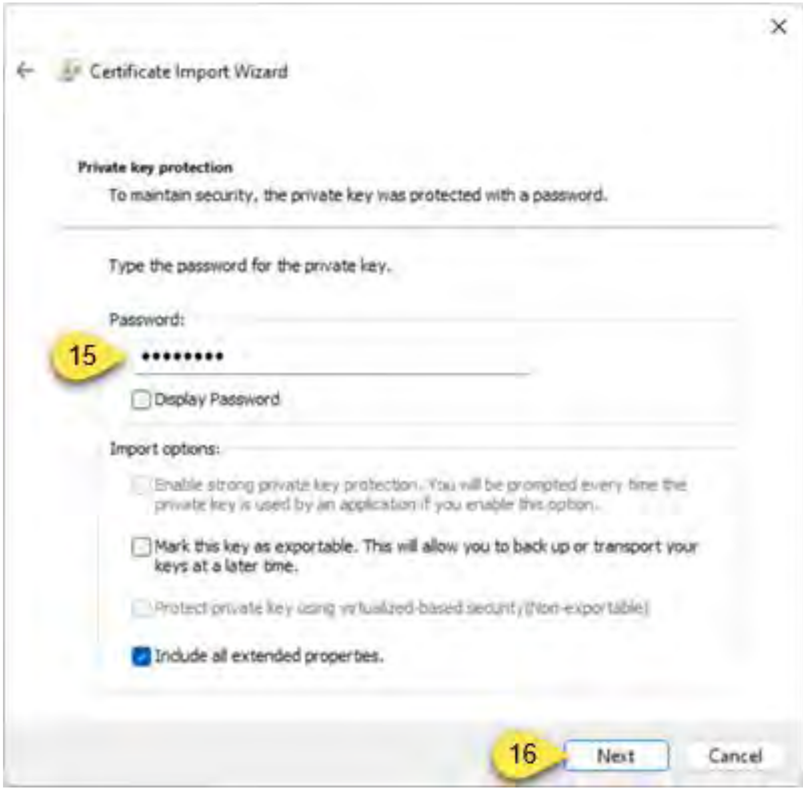
12. Set the **Store Location** as **Local Machine**.
13. Then click **Next** to continue.



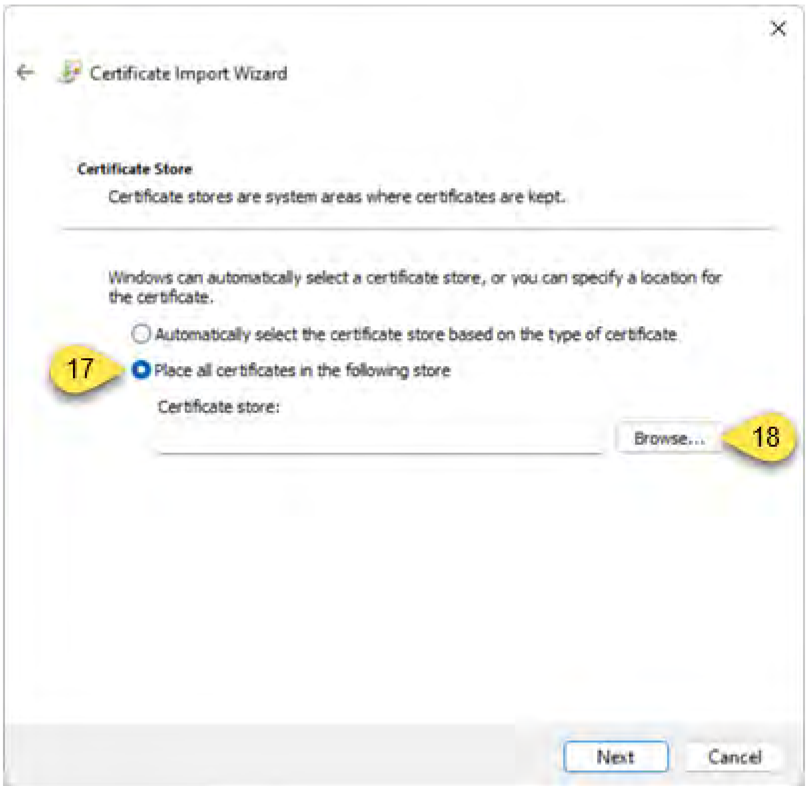
14. Click **Next** to continue.



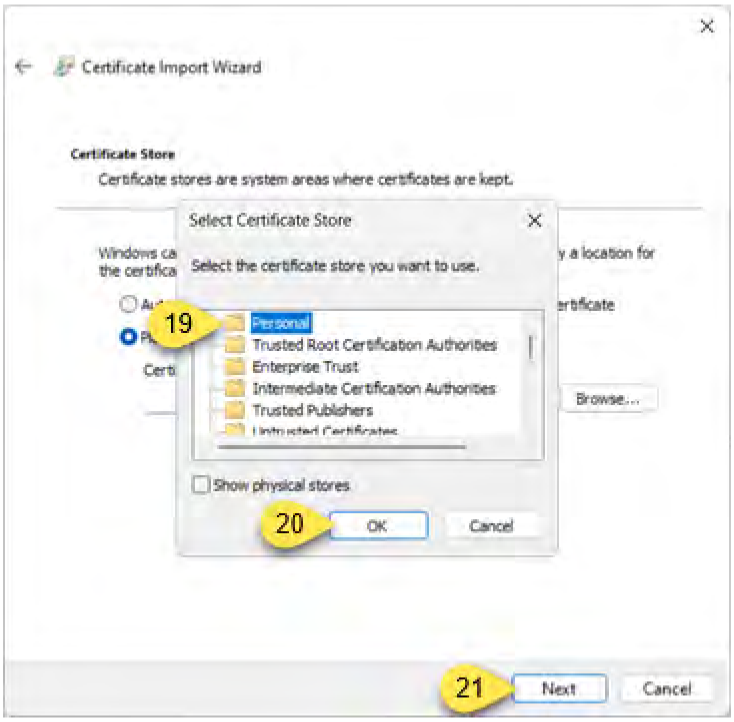
15. In the **Password** field, enter the Personal Identification Code (PIC) that was sent as an SMS to your elected mobile number.
16. Then click **Next** to continue.



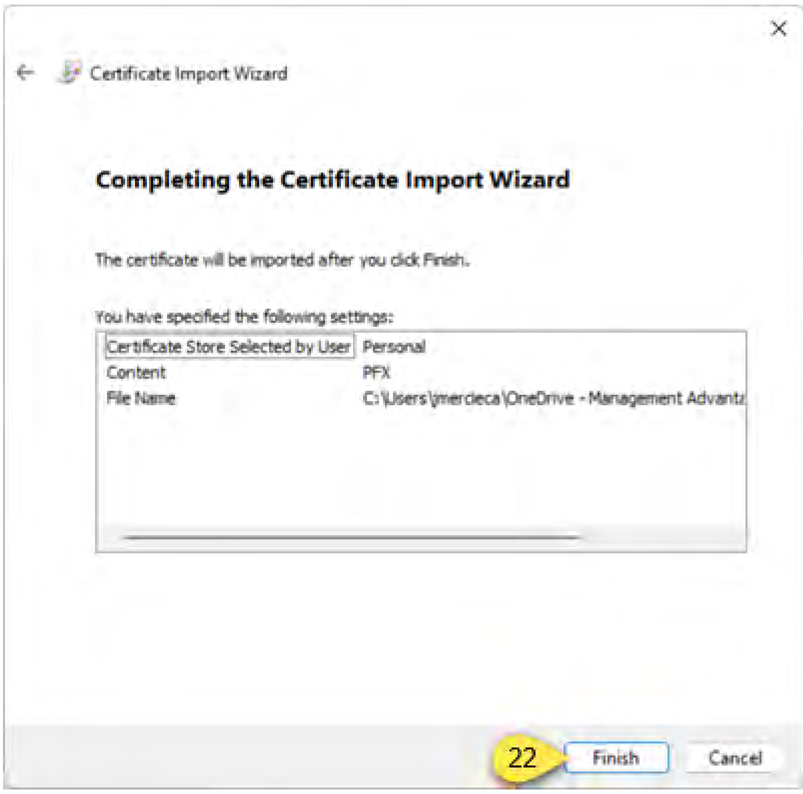
17. Select the **Place all certificates in the following store** option.
18. Click **Browse…**



19. Select **Personal**.
20. Click **OK**.
21. Then click **Next** to continue.



22. Click **Finish**.



IMPORTANT: NASH certificates are valid for 2 years, so your RO or OMO should plan to apply and install a new certificate before the expiry date.

An Organiser task reminder can be set in Manad Plus to do this. For more information, see How to assign a new Organiser task to yourself.

Manad Plus requirements

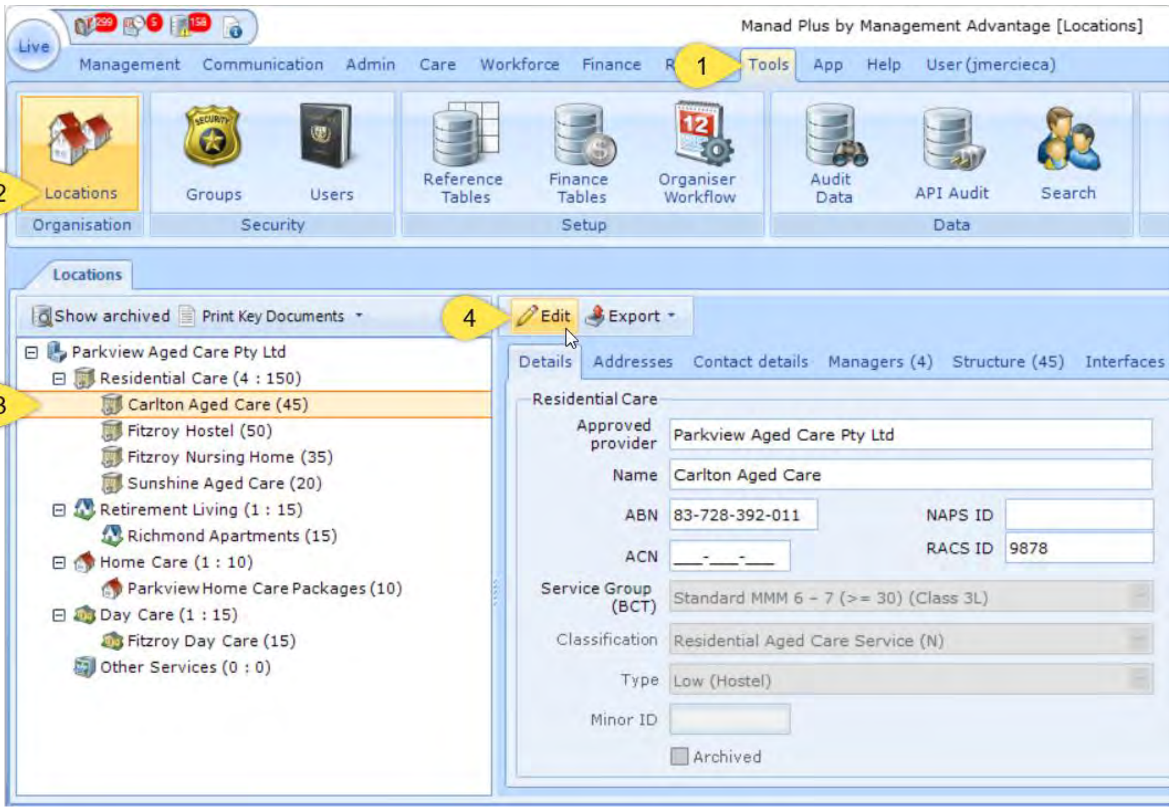
Once the NASH PKI certificate has been installed on your host server, you will be able to begin integrating MHR with Manad Plus if you are running **Version 5.15.06160.1** or higher.

Step 2: Enter the HPI-O for your location(s)

Your organisation needs a Healthcare Provider Identifier-Organisation (HPI-O) to use the Healthcare Identifiers (HI) Service and access My Health Record (MHR). This is a unique 16-digit number that identifies your organisation in the HI Service.

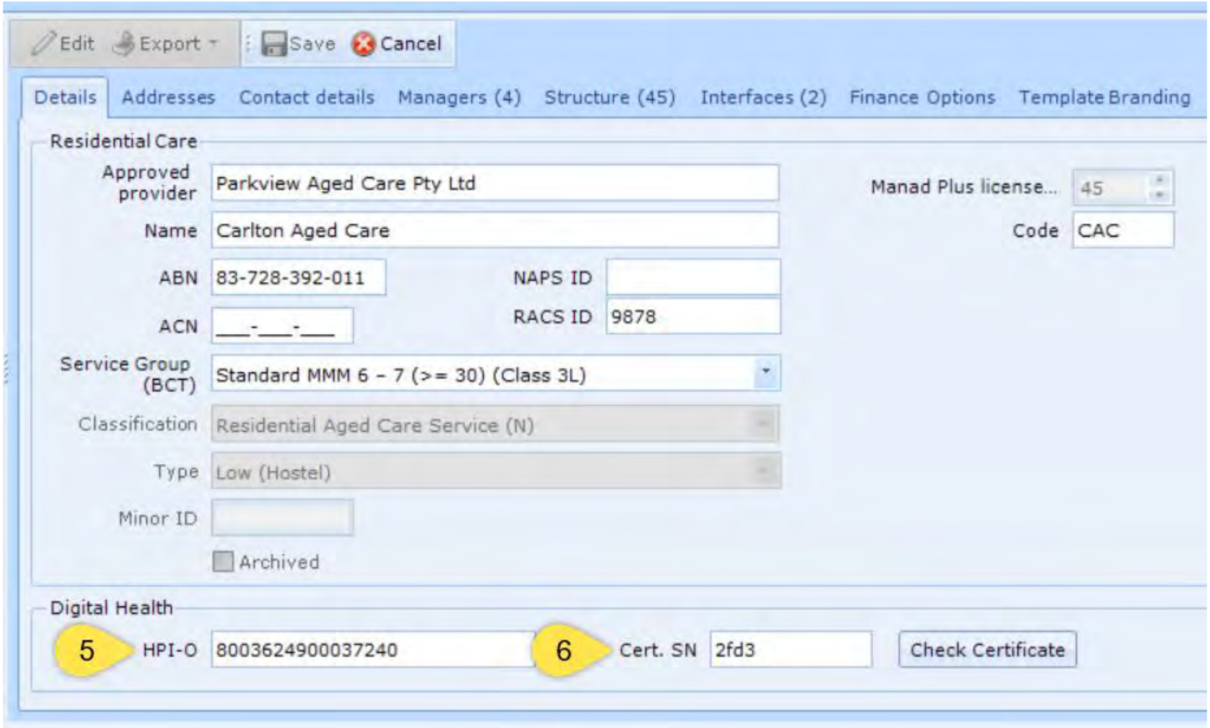
If you do not already have an HPI-O, your Registered Officer (RO) will need to complete a registration request for your Seed Organisation by accessing HPOS via PRODA. For more information, see MHR Organisation Registration Checklist (.pdf)

1. Go to the **Tools** module tab.
2. Open the **Locations** feature.
3. Select the relevant **Residential Care** location from the list.
4. Click the **Edit** button in the toolbar.



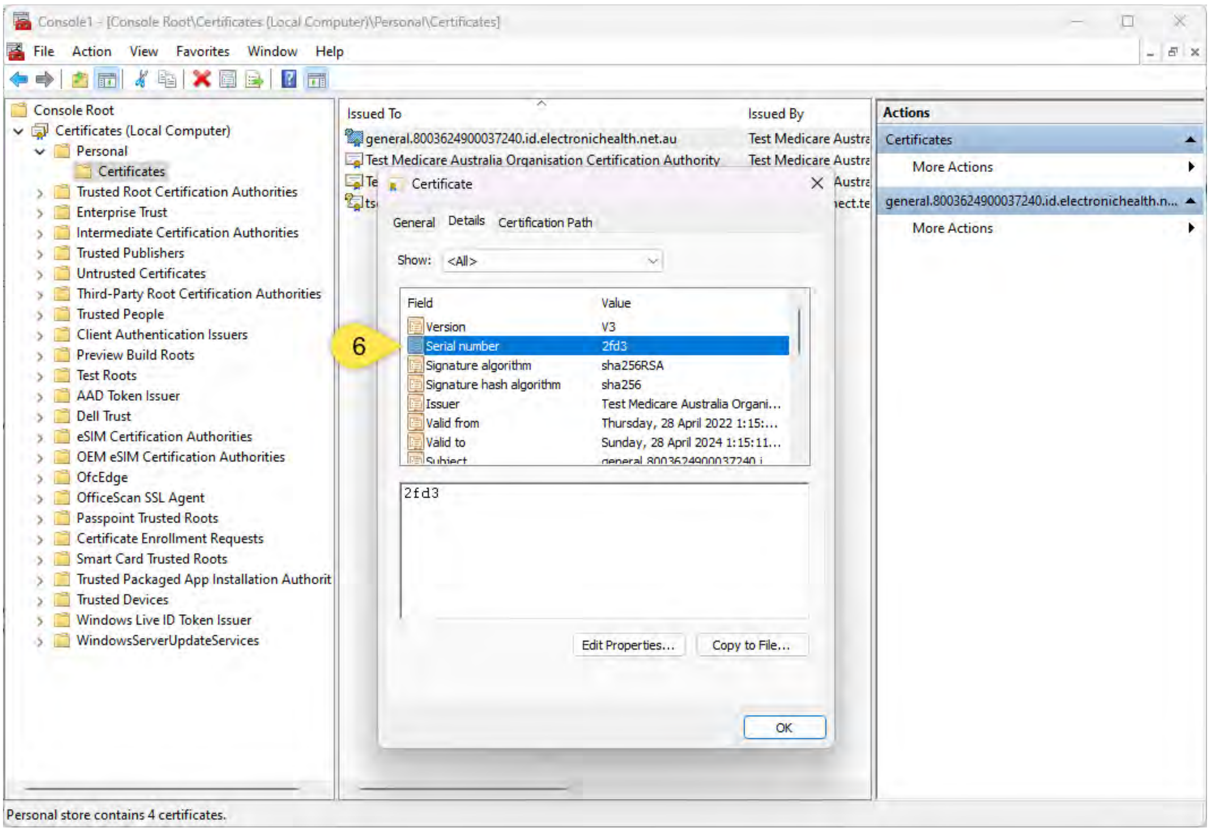
IMPORTANT: Make sure that you have entered the **Approved provider** name that is registered as this will be required for the MHR integration to be successful.

5. In the **Details** tab, enter the relevant **HPI-O**.



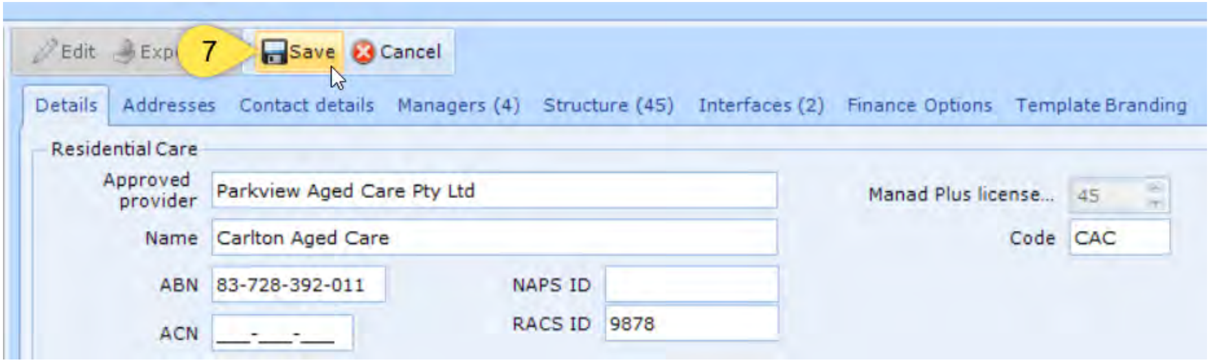
6. Then enter the **Cert. SN (Certificate Serial Number)**. This is visible from the Microsoft Management Console.

   If you don't have visibility of the certificates you will need to use the MMC Snap in, please refer to Microsoft's guide if you have any issues: [How to: View certificates with the MMC snap-in]



Note: You can use the **Check Certificate** button to ensure the serial number you have entered is correctly linking to MHR.

7. Click **Save** to confirm.



IMPORTANT: Please ensure all of the following fields have been entered correctly for the chosen location, as these will be required for you to upload documents to MHR.

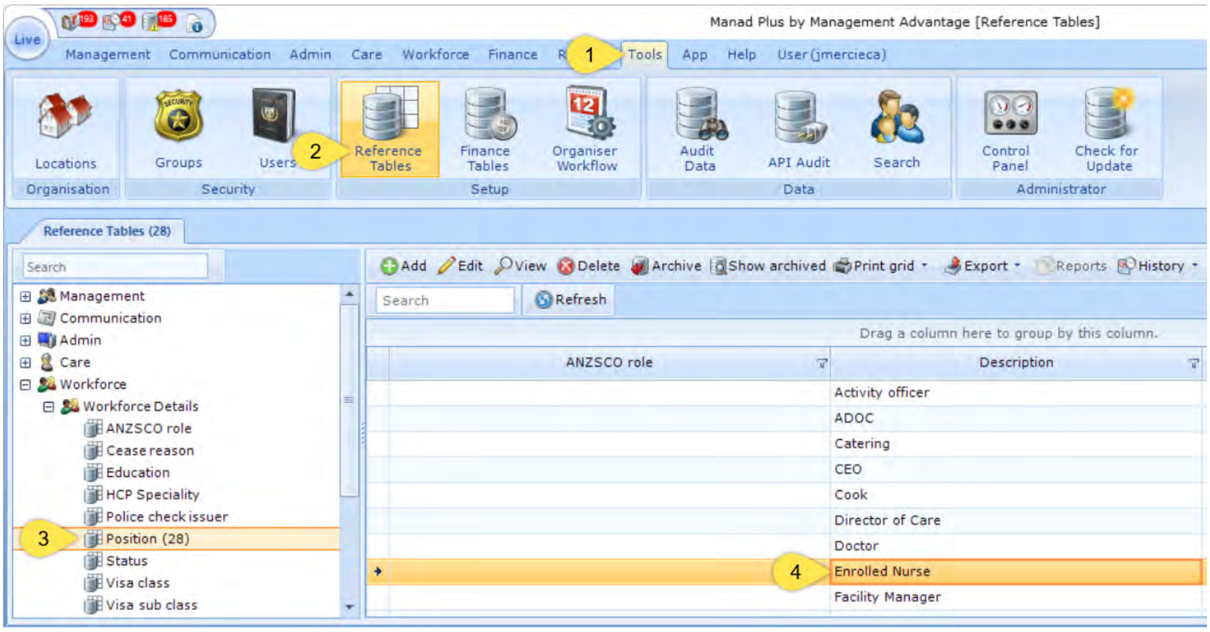
- Addresses > Site address
- Addresses > Mailing address
- Contact Details > Business hours
- Contact Details > Email

Step 3: Setup the ANZSCO roles for your staff members

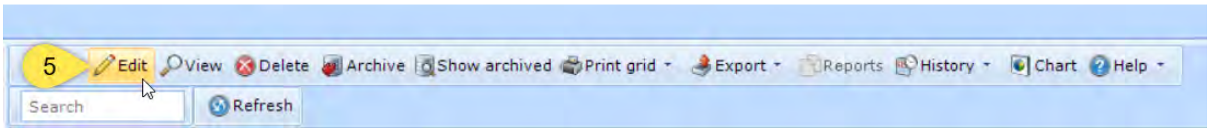
When documents are uploaded to MHR by a staff member, the ‘role’ of the staff member will be placed against the record that is uploaded.

This role must be taken from the Australian and New Zealand Standard Classification of Occupations (ANZSCO) list, which you can now link to your staff members’ Primary Position.

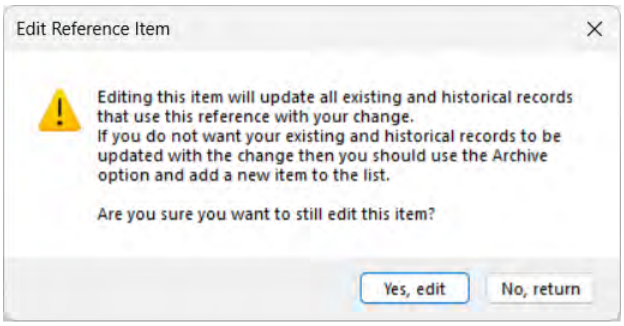
1. Go to the **Tools** module tab.
2. Open the **Reference Tables** feature.
3. In the left-hand section, click to open **Workforce > Workforce Details > Position**.
4. Select the relevant reference item.



5. Click the **Edit** button in the toolbar.



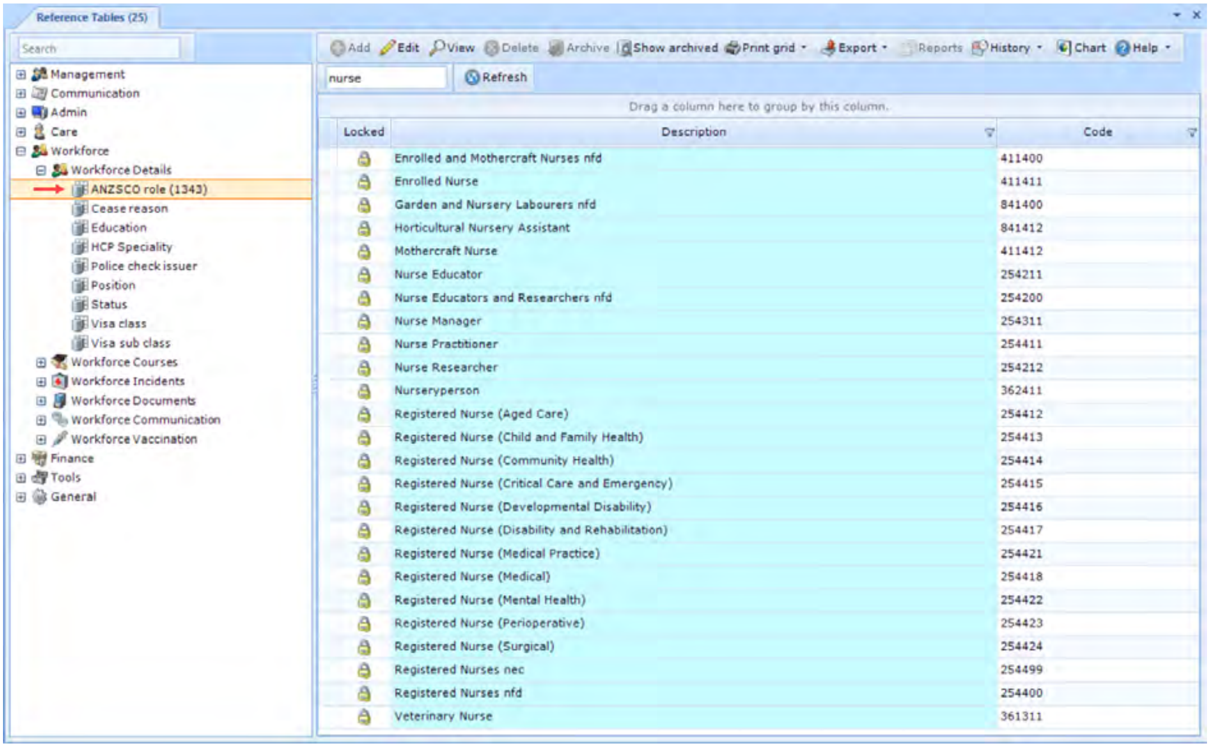
When you receive this prompt, just click **Yes, edit**.



6. Using the drop-down options, select the **ANZSCO role** that most accurately reflects the chosen position.
7. Click **Save & close**.

Repeat steps 4-7 until all the **Position** reference items have been linked to an **ANZSCO role**.

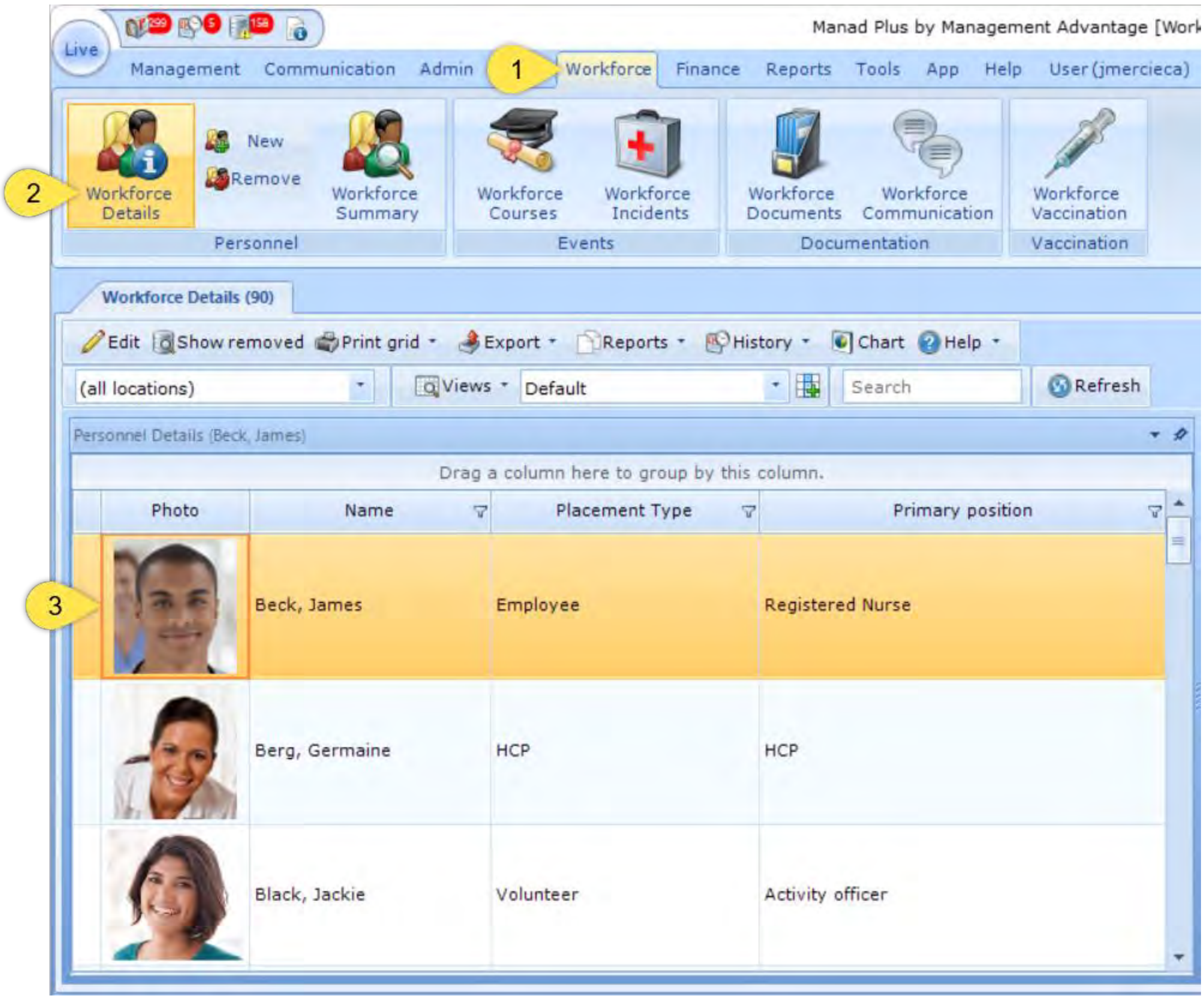
You can use the locked **ANZSCO role** reference table (via Workforce > Workforce Details) to see the available options and search for those that most accurately reflect your list of **Positions**.



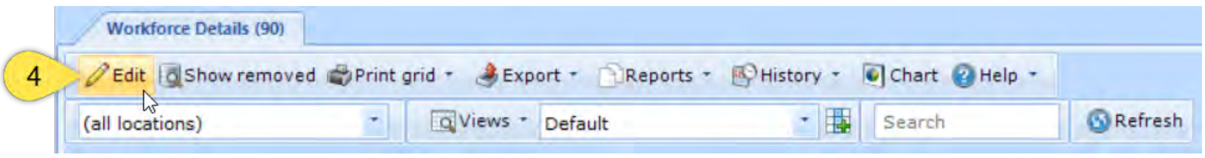
Step 4: Get the HPI-Is for your staff members

Each relevant care provider will need a Healthcare Provider Identifier-Individual (HPI-I) in order to upload records to MHR. An HPI-I is a unique number that identifies you in the HI Service.

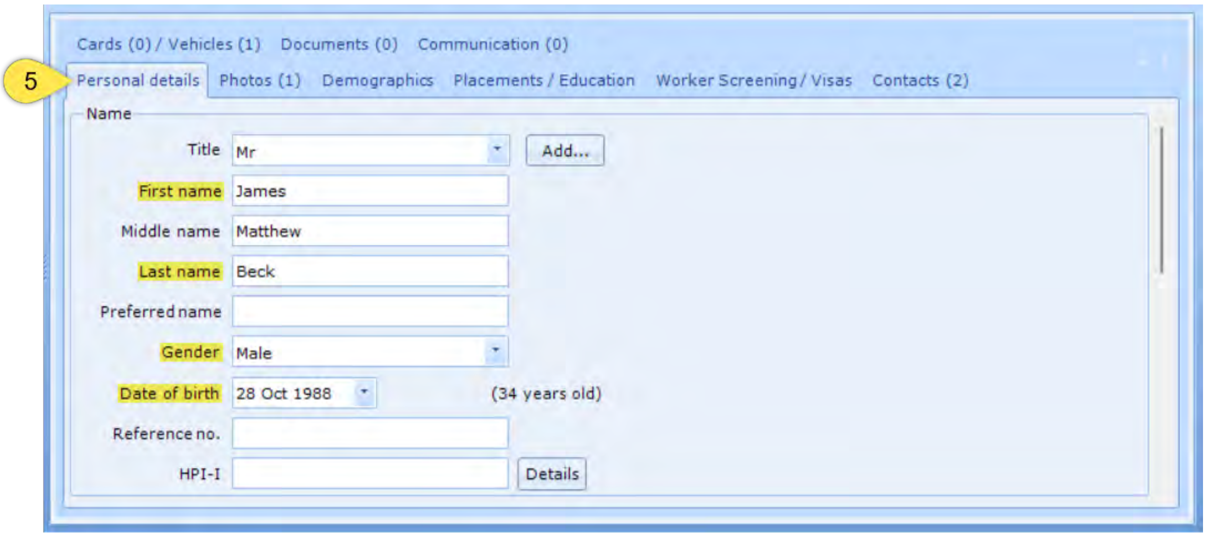
1. Go to the **Workforce** module tab.
2. Open the **Workforce Details** feature.
3. Select the relevant personnel record from the grid.



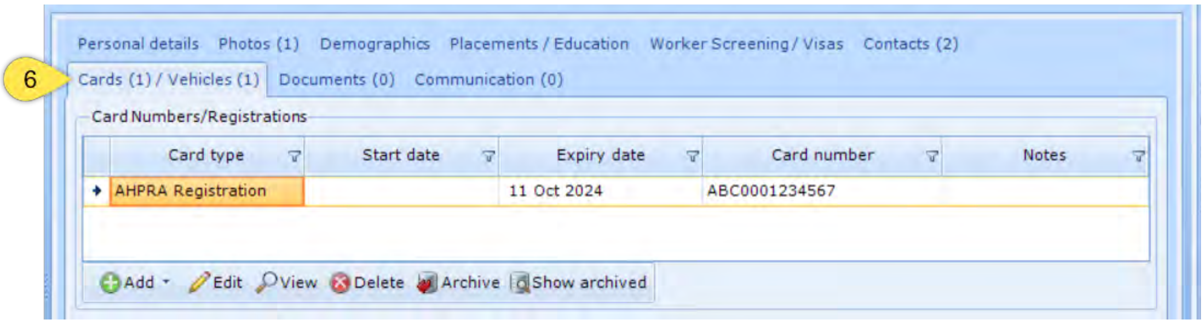
4. Click the **Edit** button in the toolbar.



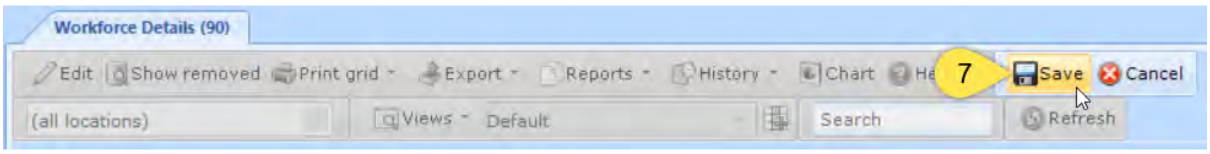
5. In the **Personal details** tab, ensure the following have been entered correctly and update them if they are missing or have not been entered correctly:
    - First name
    - Last name
    - Gender
    - Date of birth



6. If an **AHPRA Registration** card doesn't exist in the **Cards / Vehicles** tab, use the **Add** button to enter the relevant card information here.



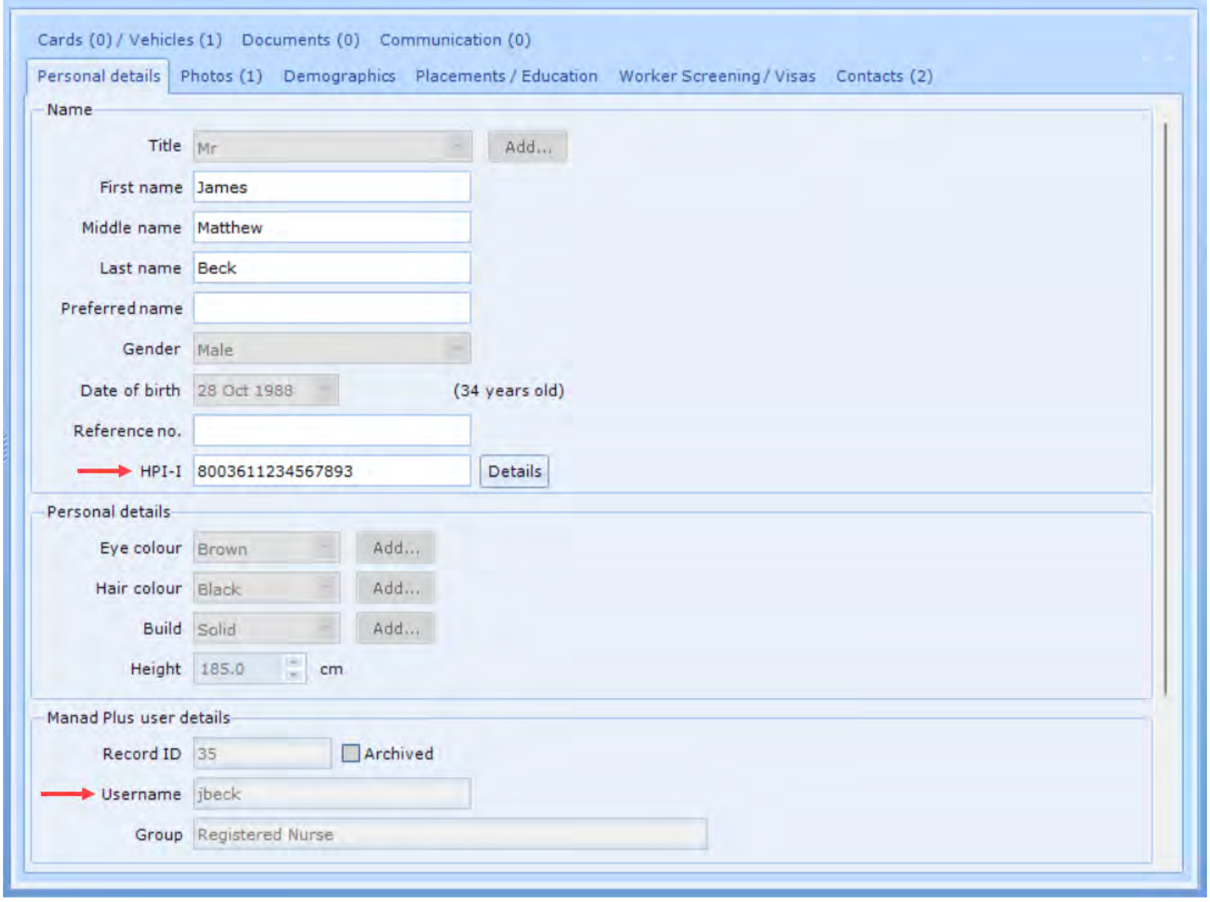
7. Click **Save** to confirm.



If all the above details have been entered correctly, the **HPI-I** should be detected automatically.

Once a valid HPI-I has been added here, the **Manad Plus User** account linked to this personnel record will now be able to send records to MHR using the **My Health Record** tab in the following features:

- Client Documents
- Progress Notes
- Client Incidents



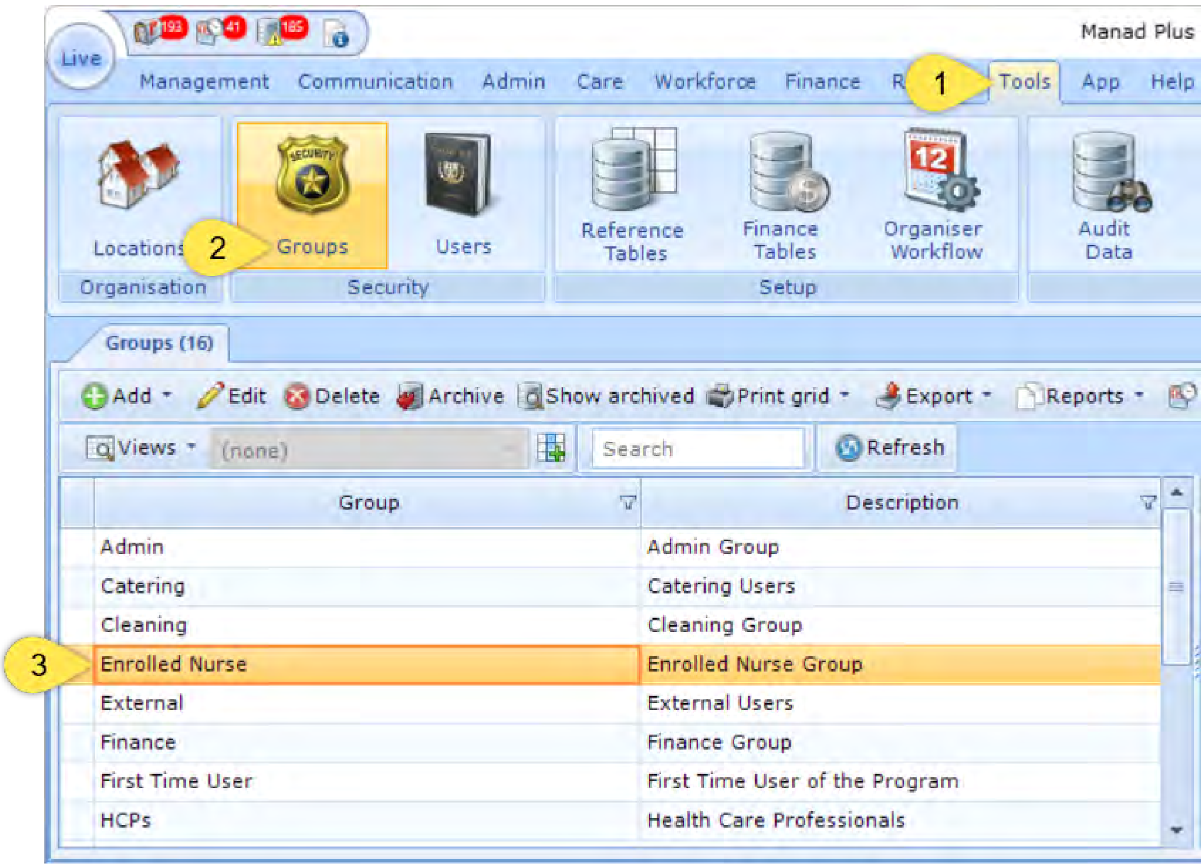
Step 5: Grant security permissions to access the MHR feature

In order for your users to access the various MHR feature integrations in Manad Plus, the User account linked to their Workforce Details record will need to be granted the relevant security permissions.

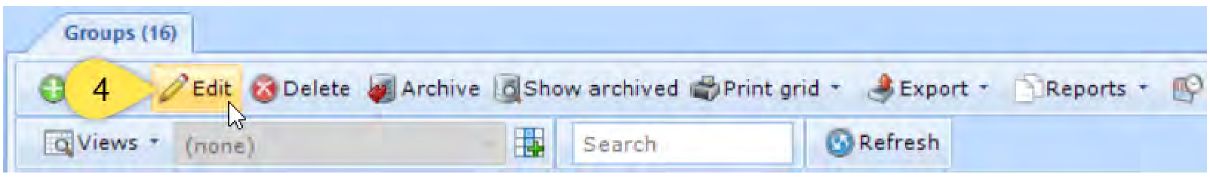
This can be done at the **Group** level (grant security permissions to multiple users) or at the **User** level (grant custom security permissions to an individual user).

Updating security permissions for all users in a Group

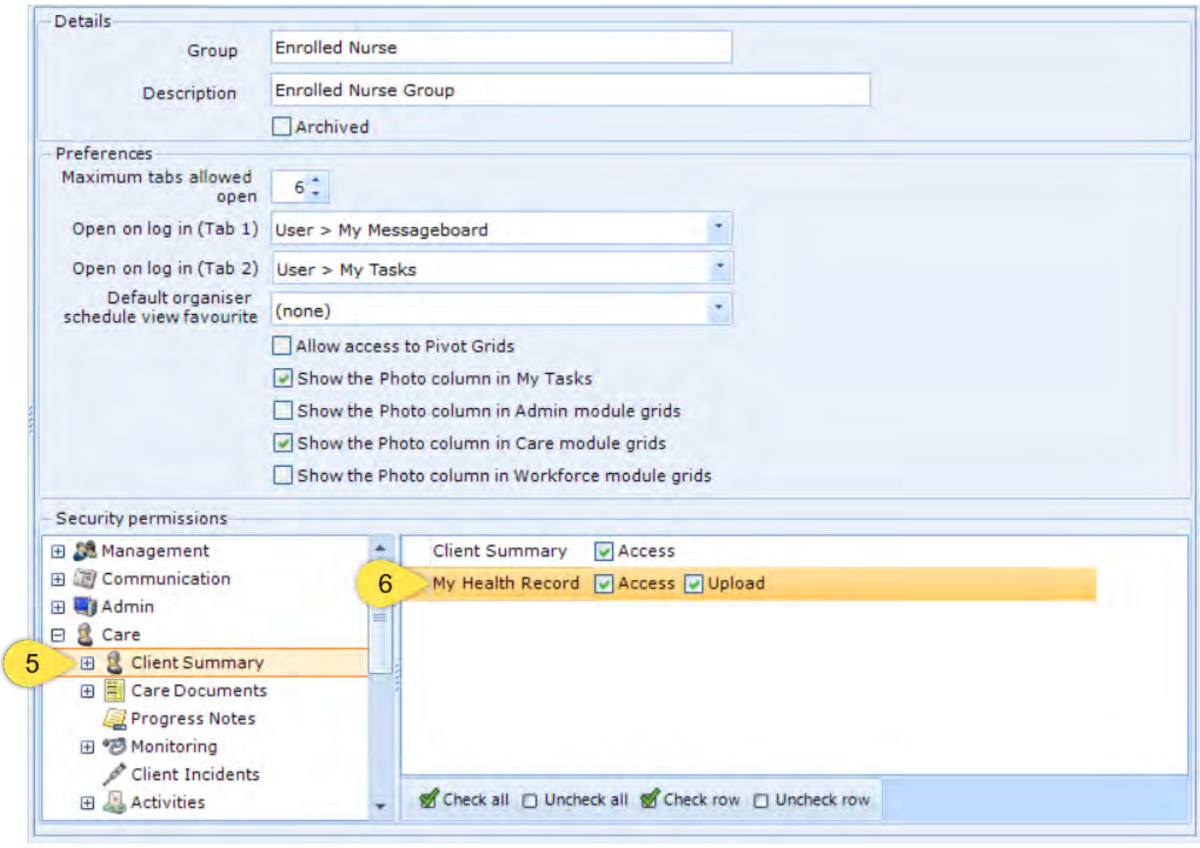
1. Go to the **Tools** module tab.
2. Open the **Groups** feature.
3. Select the relevant group from the grid.



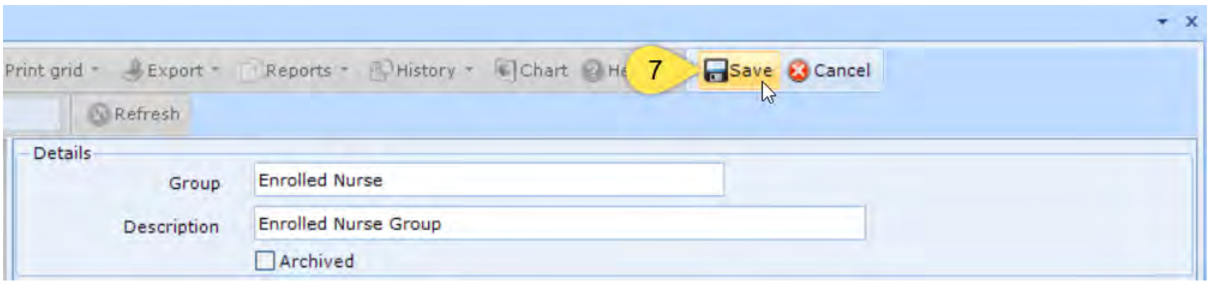
4. Click the **Edit** button in the toolbar.



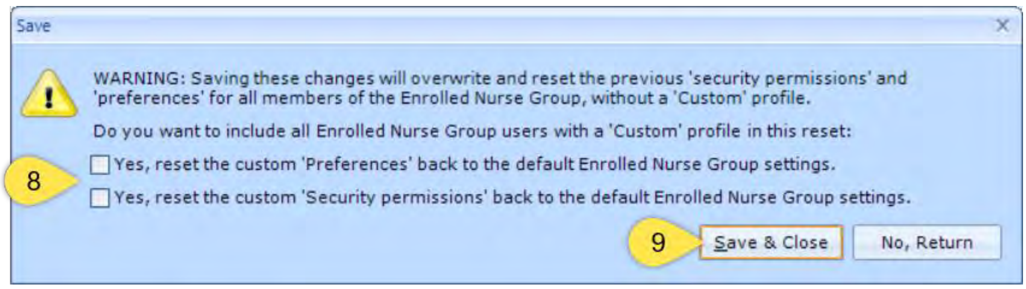
5. In the left-hand section, click to open **Care > Client Summary**.
6. Tick the **Access** and **Upload** permissions for **My Health Record**.



7. Click **Save** to confirm the changes.

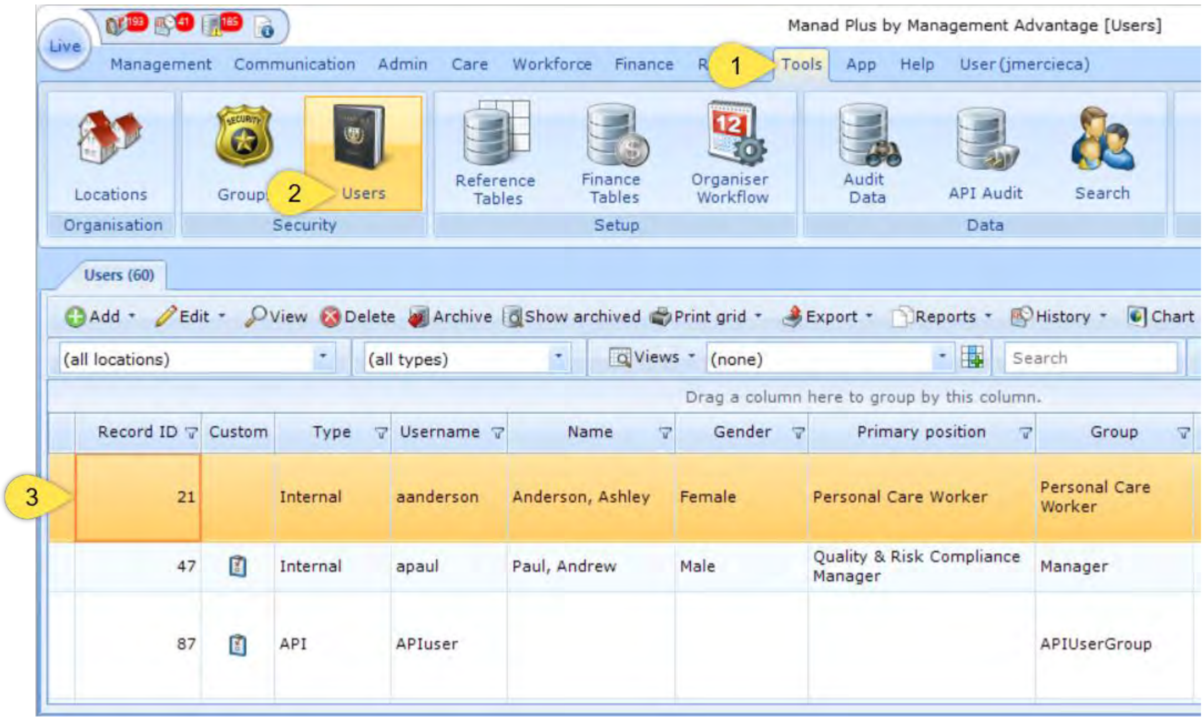


8. If you want to reset the **Preferences** and/or **Security permissions** for all **Custom Users** in the chosen group, tick the corresponding tickbox.
9. Click **Save & Close** when you're done.

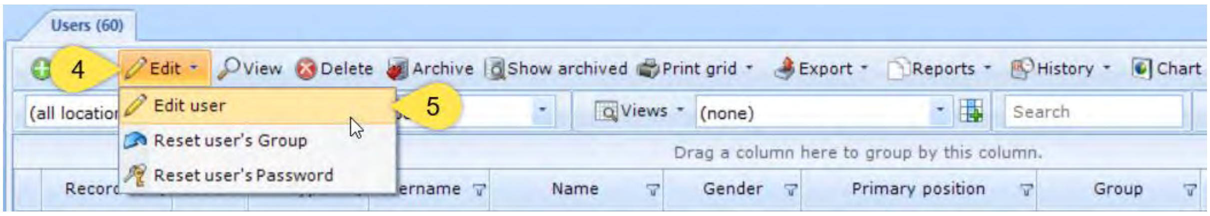


<u>Updating custom security permissions for a User</u>

1. Go to the **Tools** module tab.
2. Open the **Users** feature.
3. Select the relevant user record from the grid.

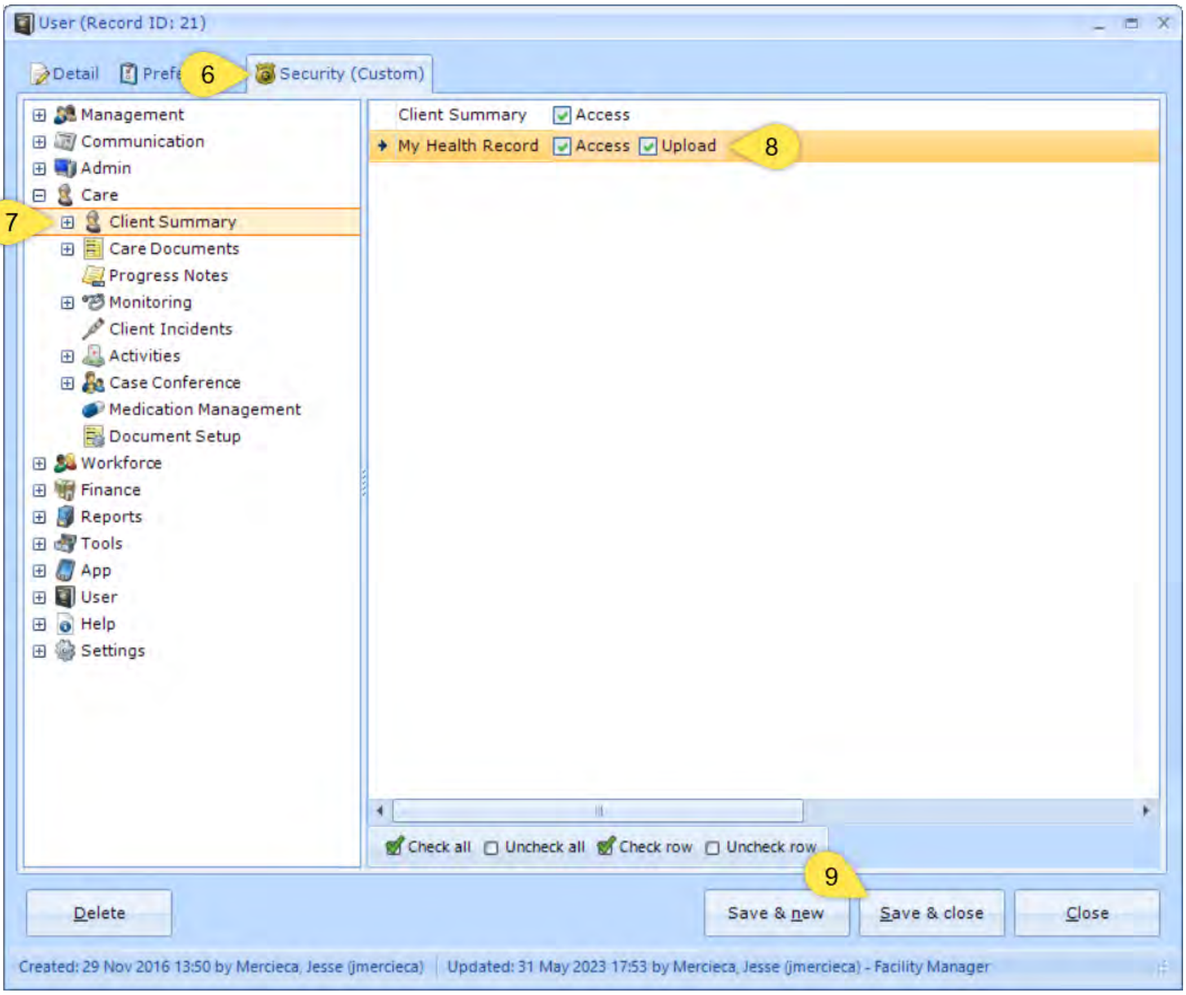


4. Click the **Edit** button in the toolbar.
5. Select **Edit user**.



6. Click to open the **Security** tab.
7. In the left-hand section, click to open **Care > Client Summary**.
8. Tick the **Access** and **Upload** permissions for **My Health Record**.
9. Click **Save & close**.

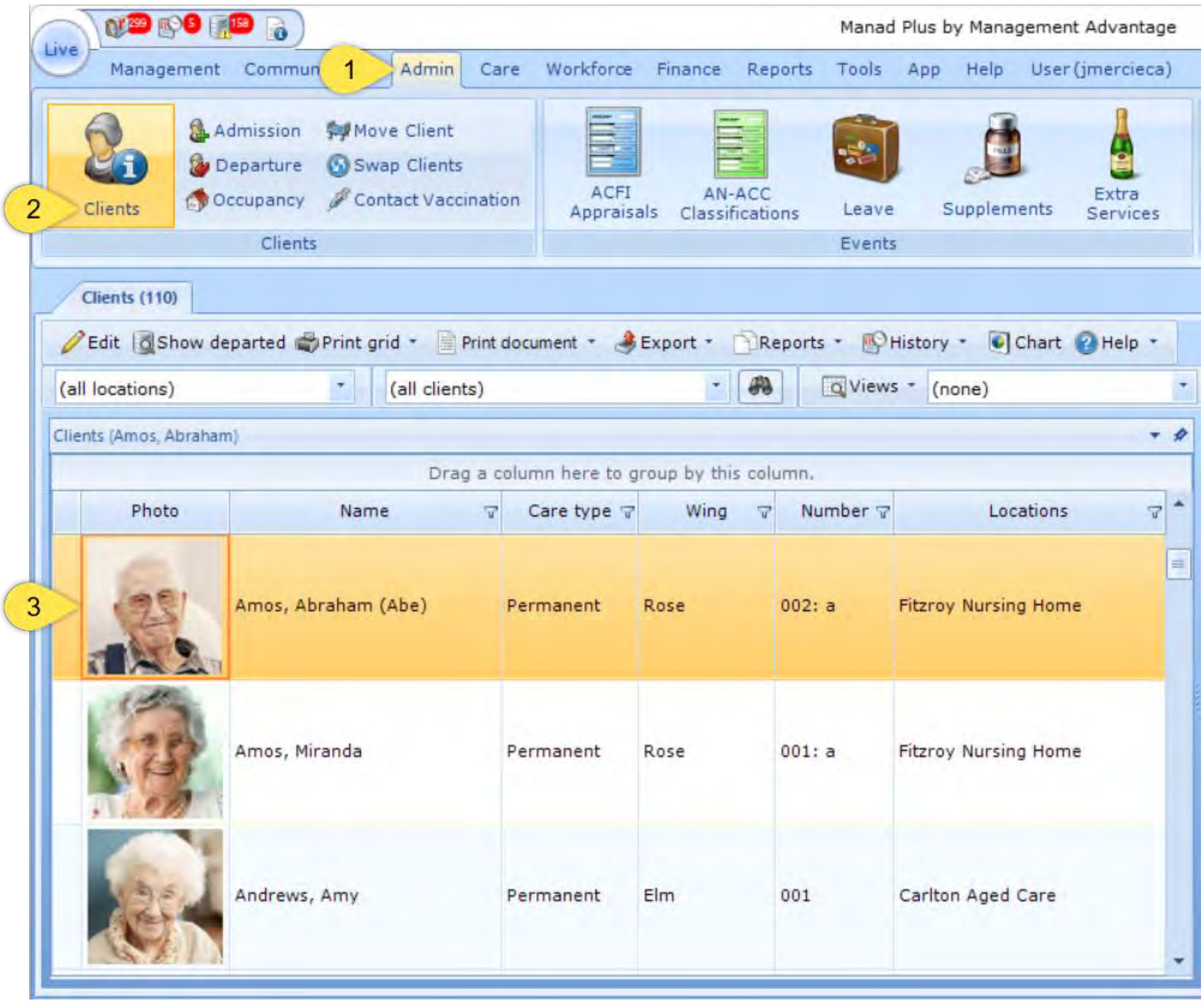
Repeat steps 3-9 for all relevant users who require custom MHR permissions.



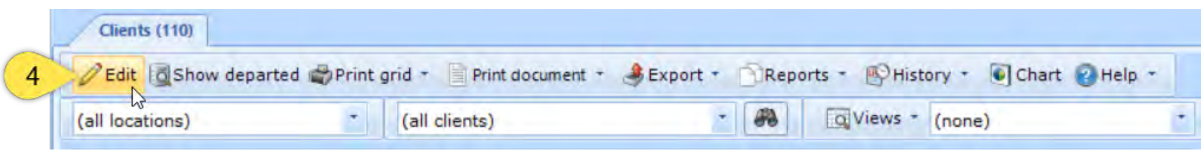
Step 6: Get the IHIs for your clients

An Individual Healthcare Identifier (IHI) is a unique number used to identify an individual for health care purposes. It helps ensure health professionals are confident that the right information is associated with the right individual at the point of care.

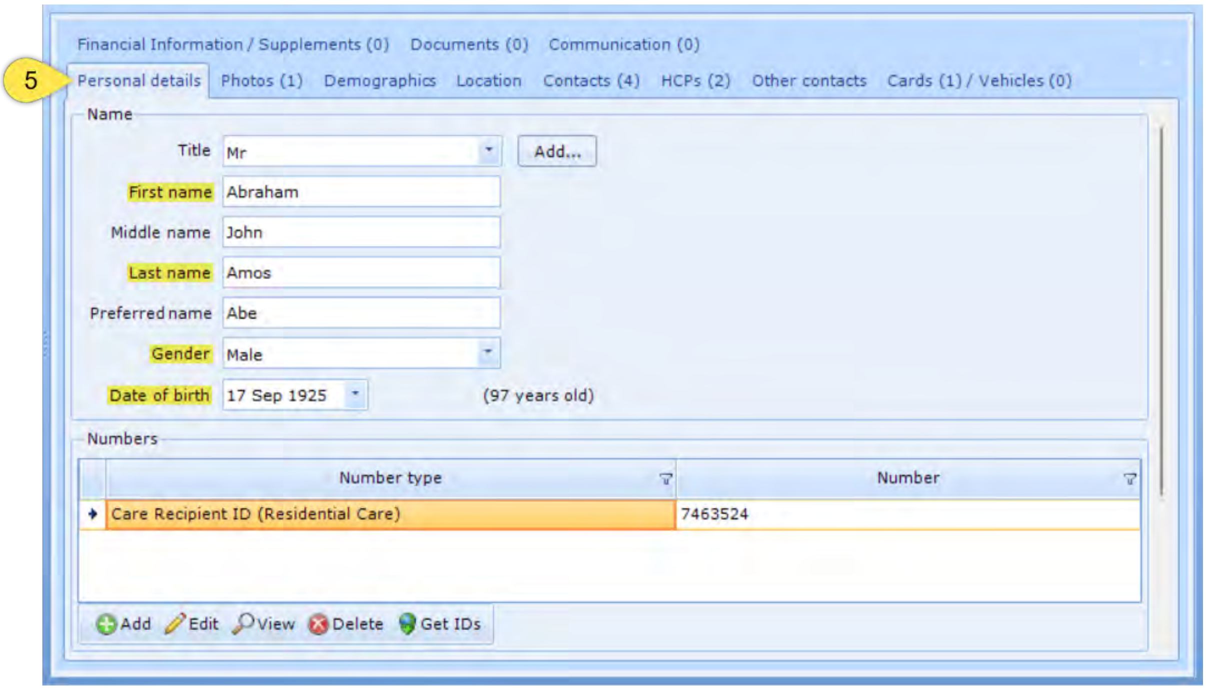
1. Go to the **Admin** module tab.
2. Open the **Clients** feature.
3. Select the relevant client from the grid.



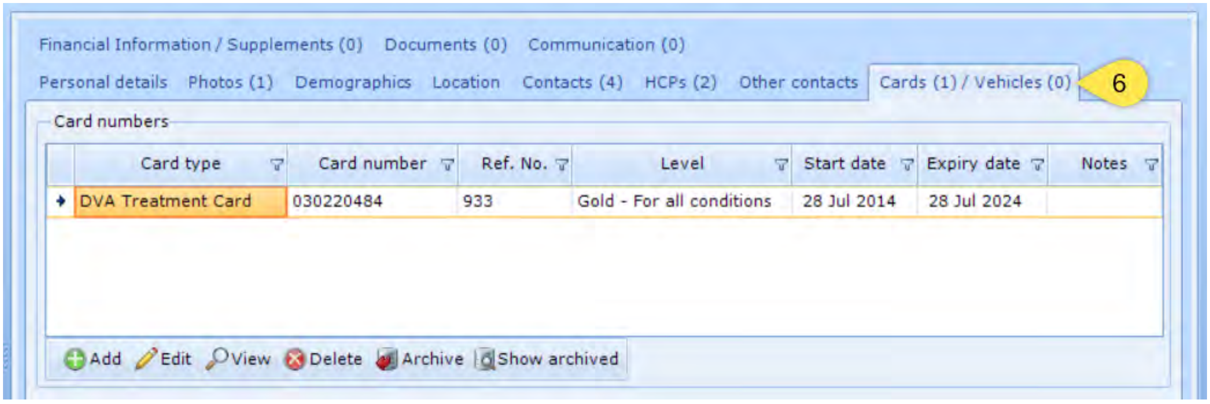
4. Click the **Edit** button in the toolbar.



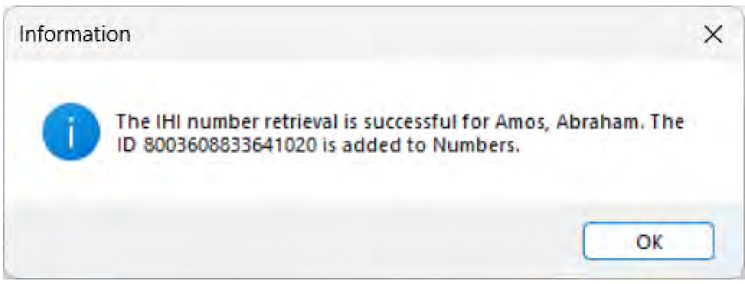
5. In the **Personal details** tab, ensure the following have been entered correctly and update them if they are missing or have not been entered correctly:
    - First name
    - Last name
    - Gender
    - Date of birth



6. If a **Medicare Card** or **DVA Card** doesn't exist in the **Cards / Vehicles** tab, use the **Add** button to enter the relevant card information here.

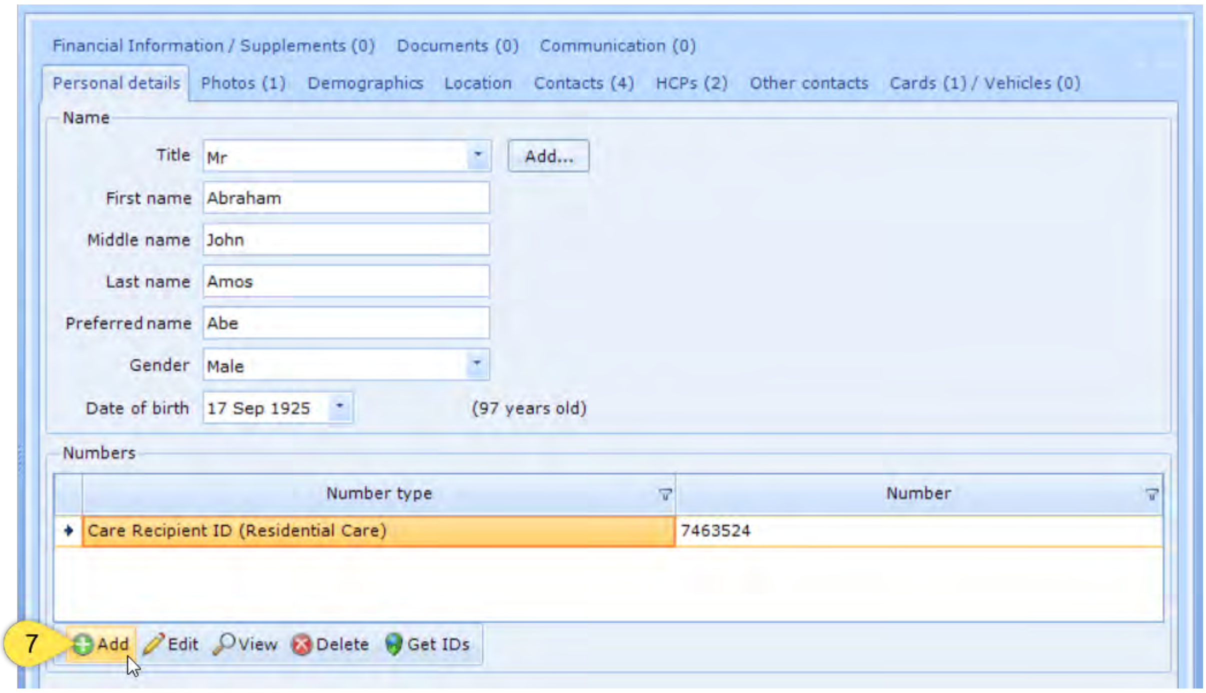


If you have made changes here, the IHI number will be retrieved automatically.



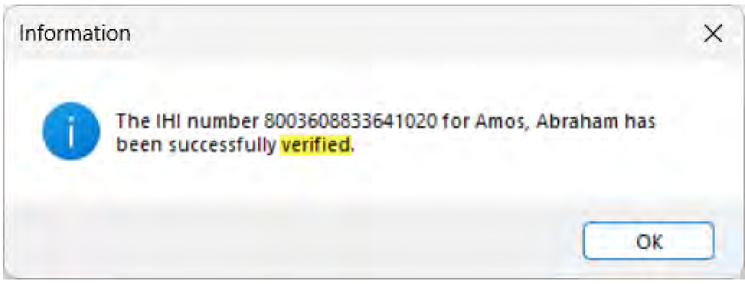
If all of these details had been entered correctly for a client prior to updating to **Version 5.15** and you had not entered their **IHI Number** already, you may need to manually **Get** this number.

7. In the **Personal details > Numbers** section, click the **Add** button.

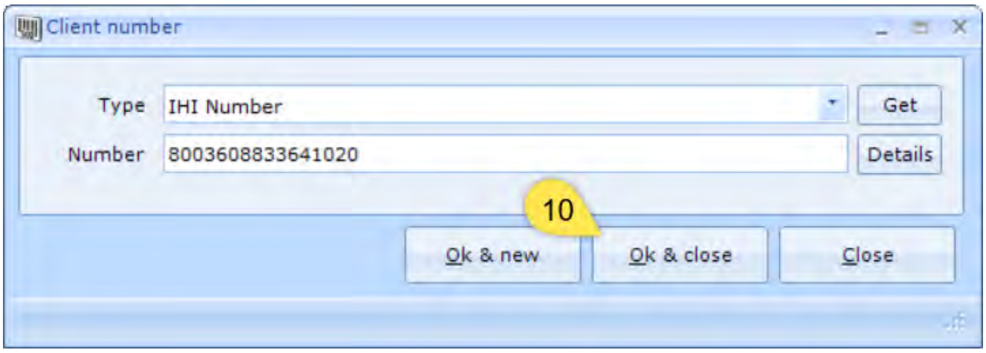


8. Select **IHI Number** using the **Type** drop-down menu.
9. Click the **Get** button to look-up the client's IHI based on the following.

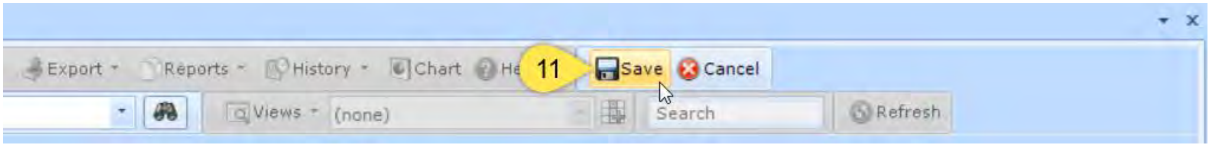
IMPORTANT: The IHI number will also need to be 'verified'. This should also occur as part of the automatic linking process.



10. Click **Ok & close**.



11. Click **Save** to confirm.

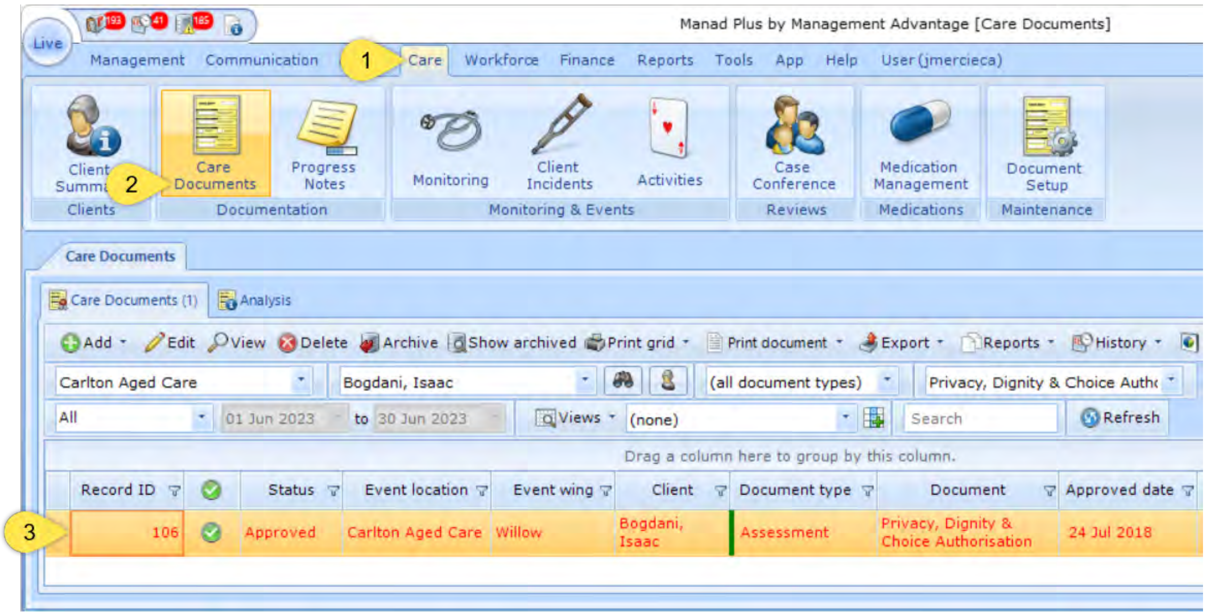


Step 7: Update client permission to upload documents to MHR

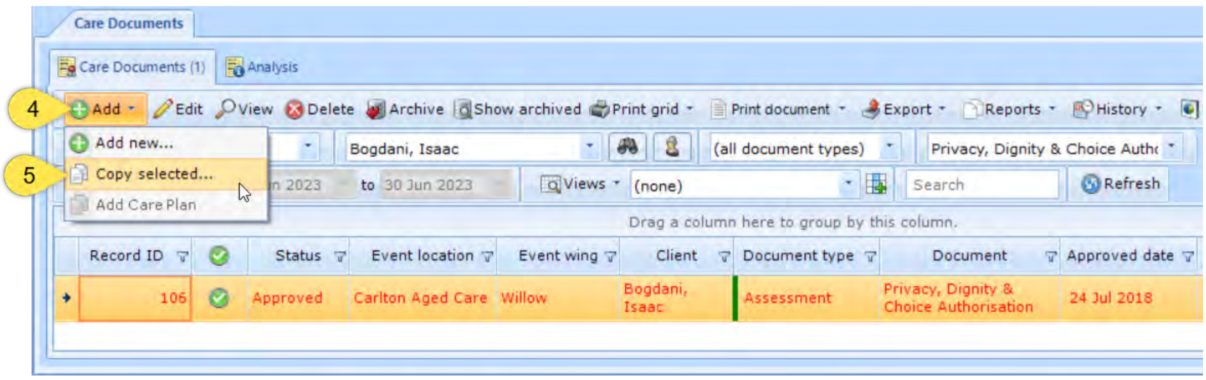
Each client needs to give permission to have their documents uploaded to MHR. You can record their permissions using the **Privacy, Dignity & Choice Authorisation**.

However, this is not mandatory and if the relevant question is unanswered, the Manad Plus system will assume permission has been granted to upload documents.

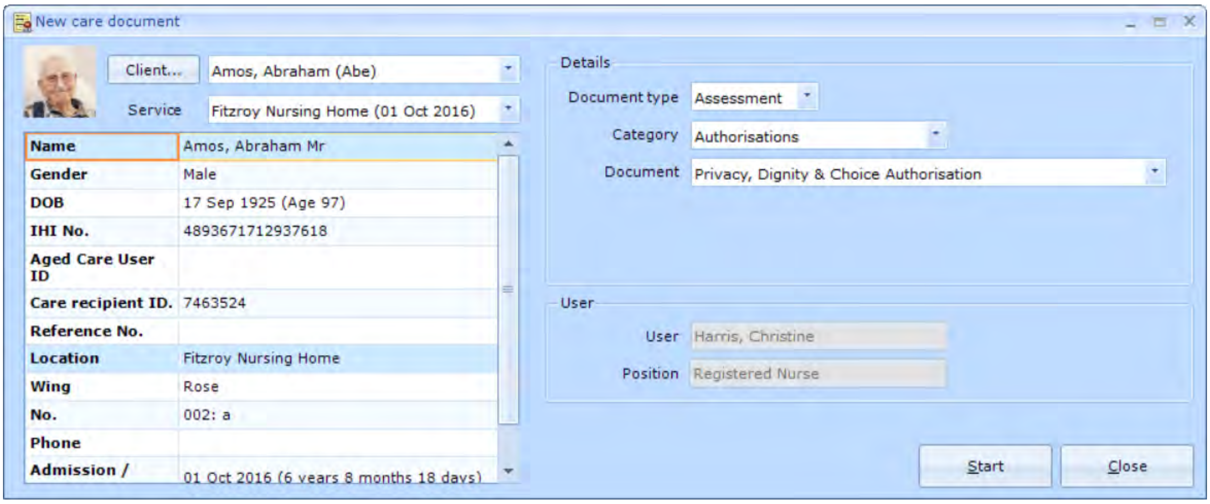
1. Go to the **Care** module tab.
2. Open the **Care Documents** feature.
3. Select the relevant **Privacy, Dignity & Choice Authorisation** document from the grid.



4. Click the **Add** button in the toolbar.
5. Select **Copy selected…**



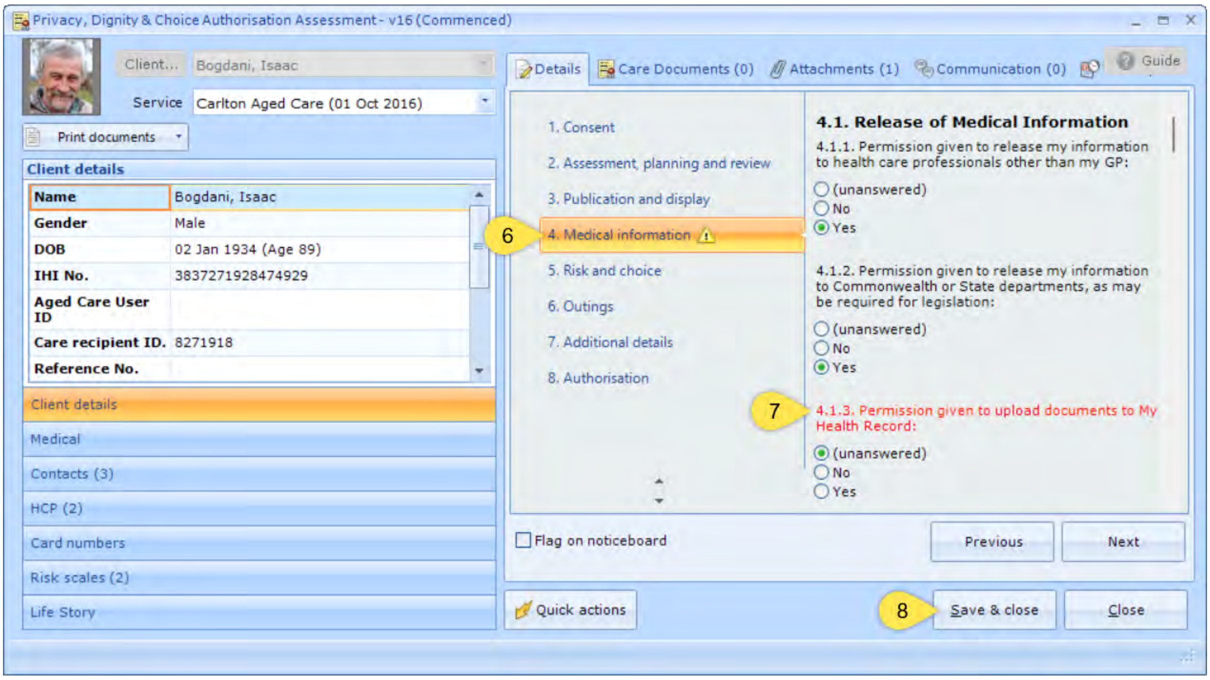
Note: If the relevant client doesn't have a **Privacy, Dignity & Choice Authorisation**, you will need to start a brand-new record for them using the **Add > Add new** option.



6. Click to open the **Medical information** section.
7. Enter the relevant answer to the question: **Permission given to upload documents to My Health Record**.

Then enter and/or update all other relevant answers to the other questions.

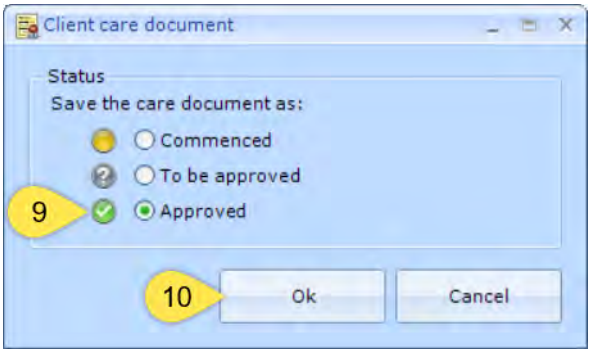
8. When you're done, click **Save & close**.



9. In the **Status** section, select **Approved**.

IMPORTANT: You must save the document as **Approved** for the MHR integration, and this can only be done if all mandatory questions have been answered.

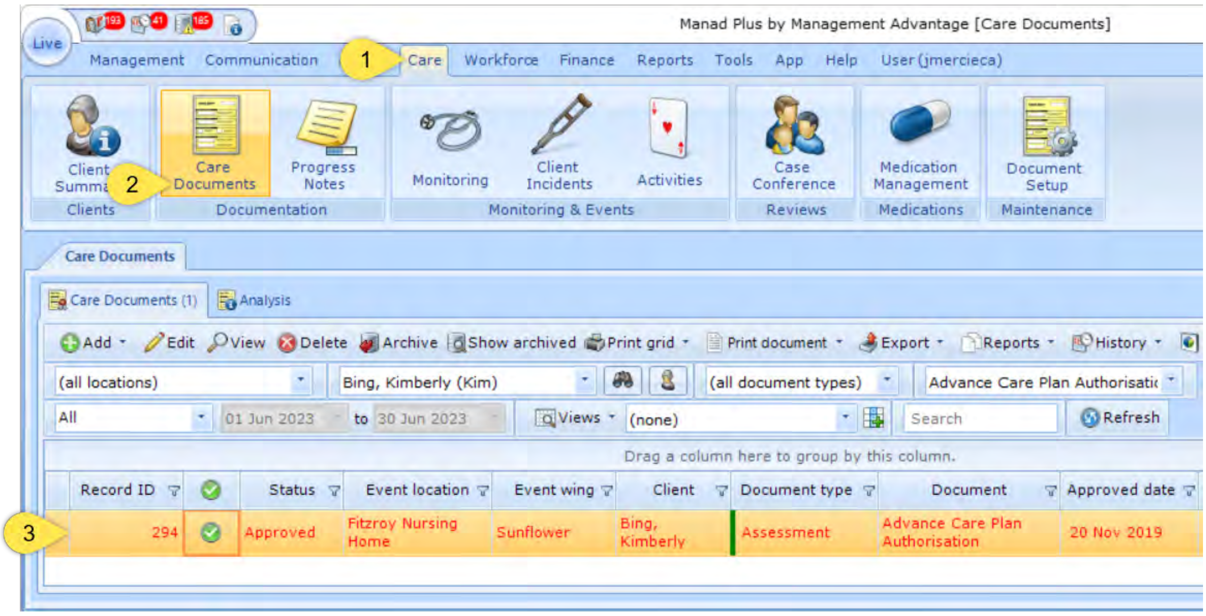
10. Click **Ok** to save.



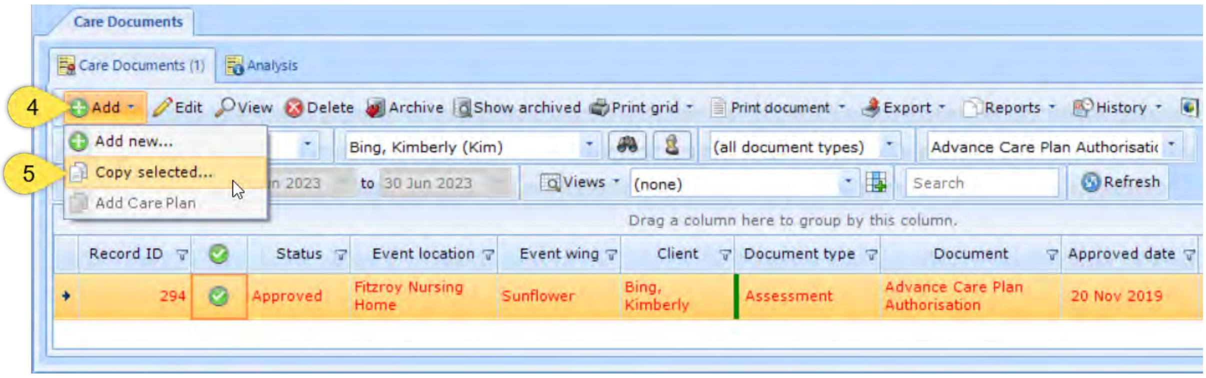
Step 8: Update client consent to upload an Advance Care Plan to MHR

Each client needs to give consent to have their **Advance Care Plan** uploaded to MHR. However, unlike Step 7 this is mandatory if you want to use this feature.

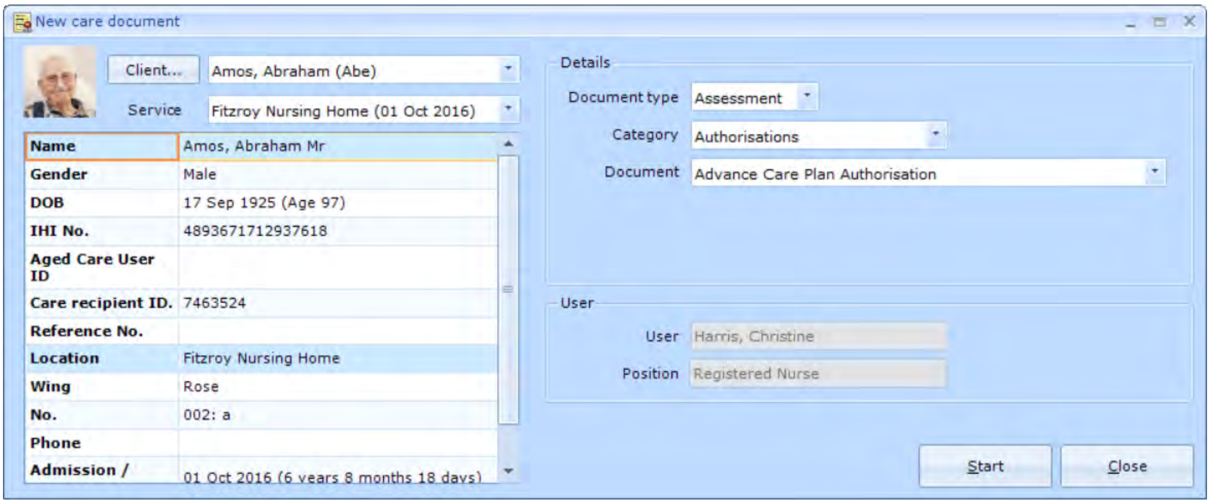
1. Go to the **Care** module tab.
2. Open the **Care Documents** feature.
3. Select the relevant **Advance Care Plan Authorisation** document from the grid.



4. Click the **Add** button in the toolbar.
5. Select **Copy selected…**



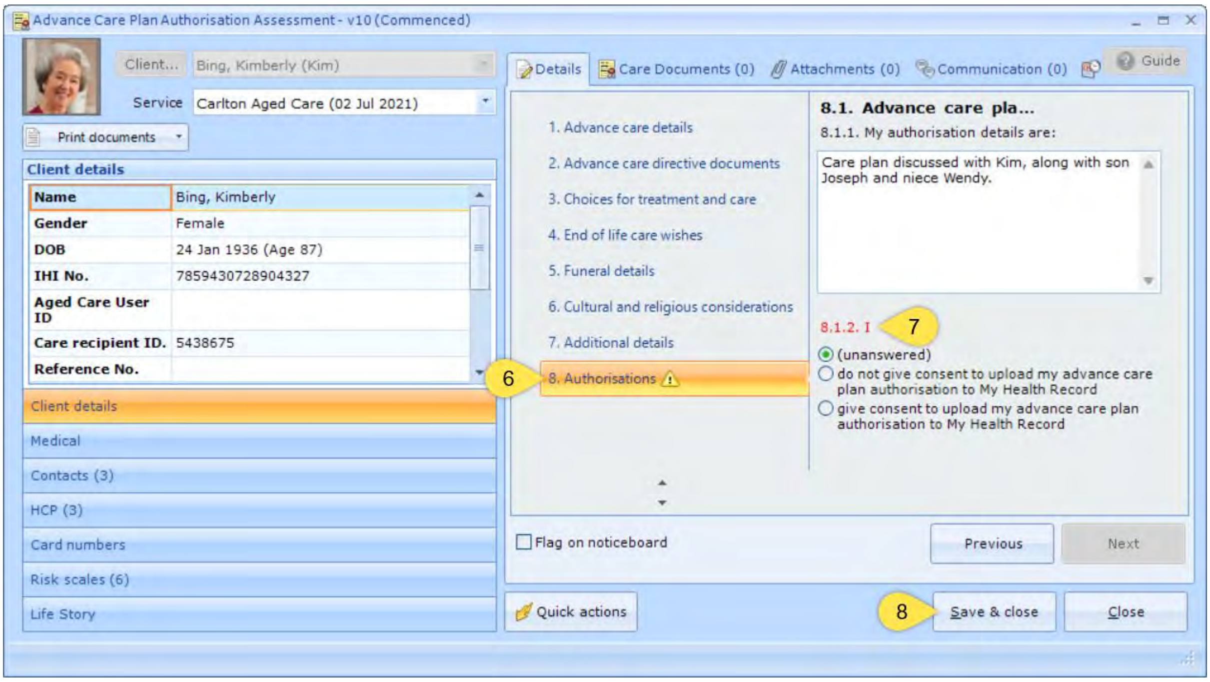
Note: If the relevant client doesn't have an **Advance Care Plan Authorisation**, you will need to start a brand-new record for them using the **Add > Add new option**.



6. Click to open the **Authorisation** section.
7. Enter the relevant answer to the question: **I [do not give/give] consent to upload my advance care plan authorisation to My Health Record**.

Then enter and/or update all other relevant answers to the other questions.

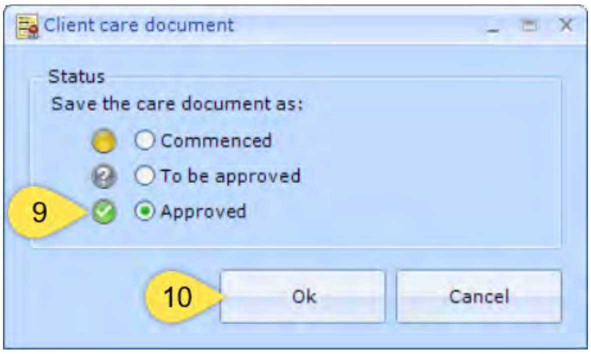
8. When you're done, click **Save & close**.



9. In the **Status** section, select **Approved**.

IMPORTANT: You must save the document as **Approved** for the MHR integration, and this can only be done if all mandatory questions have been answered.

10. Click **Ok** to save.

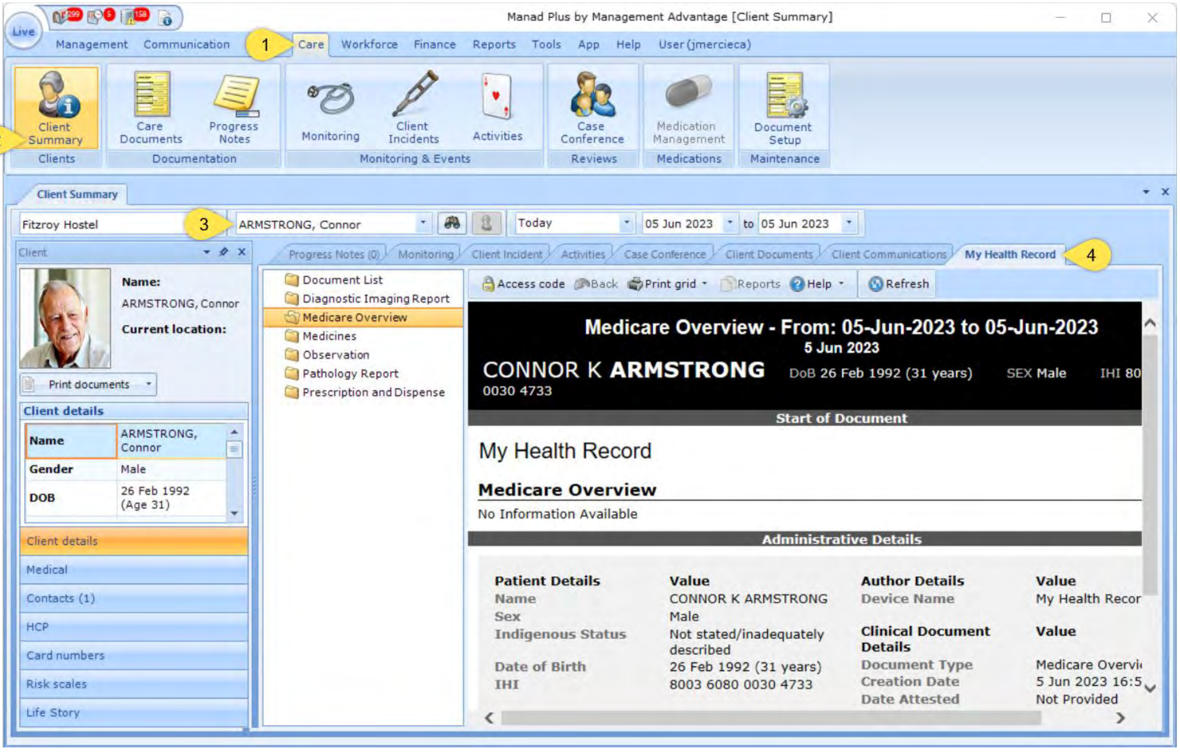


Using the MHR integration in Manad Plus

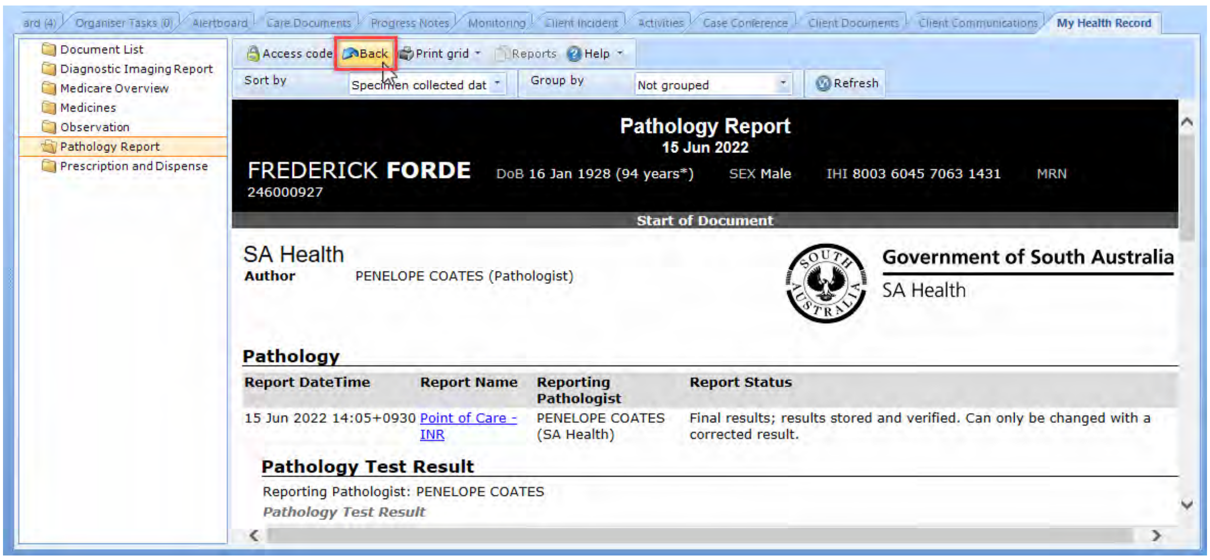
How to access a client's My Health Record

1. Go to the **Care** module tab.
2. Open the **Client Summary** feature.
3. Select the relevant client from the drop-down options.
4. Click to open the **My Health Record** tab.

Several features are available in this tab and the data returned will be dependent on the **Date range** you have chosen in the main **Client Summary** toolbar.

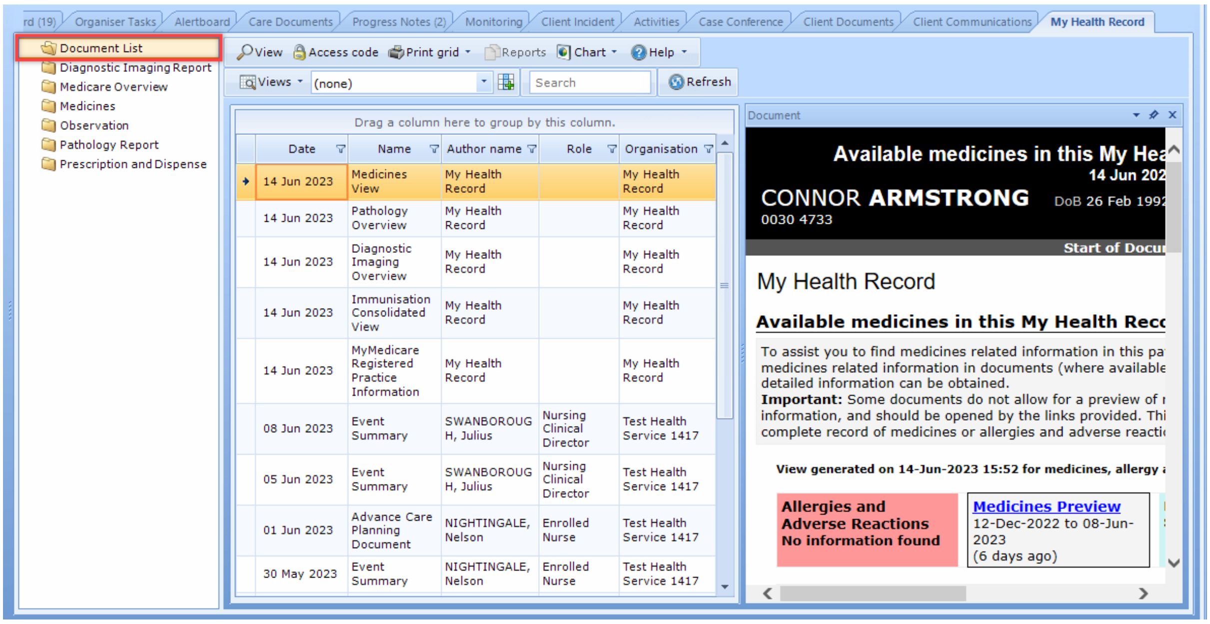


Some of these MHR features will take you to different screens as you step through the available data. To return to the previous screen, simply click the **Back** button in the toolbar.

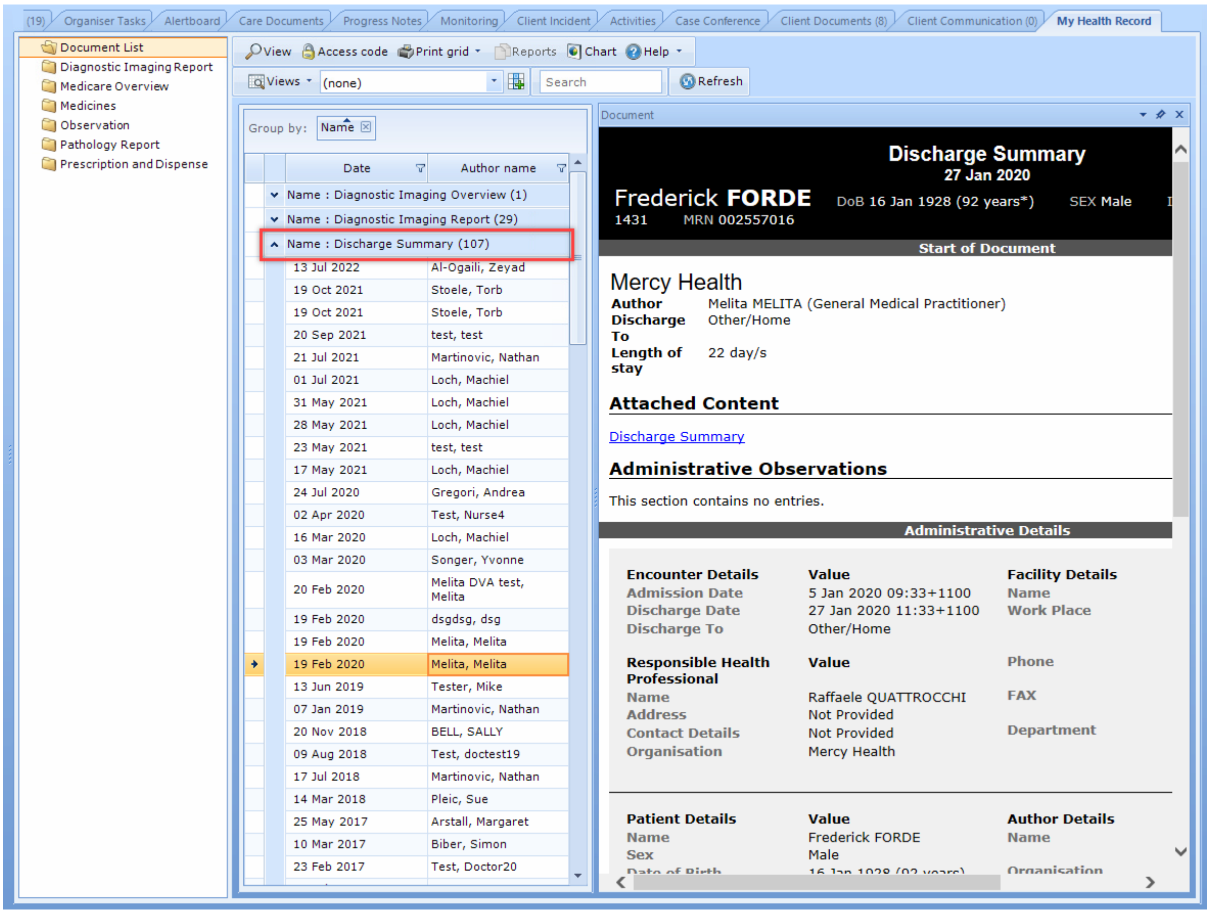


Document List

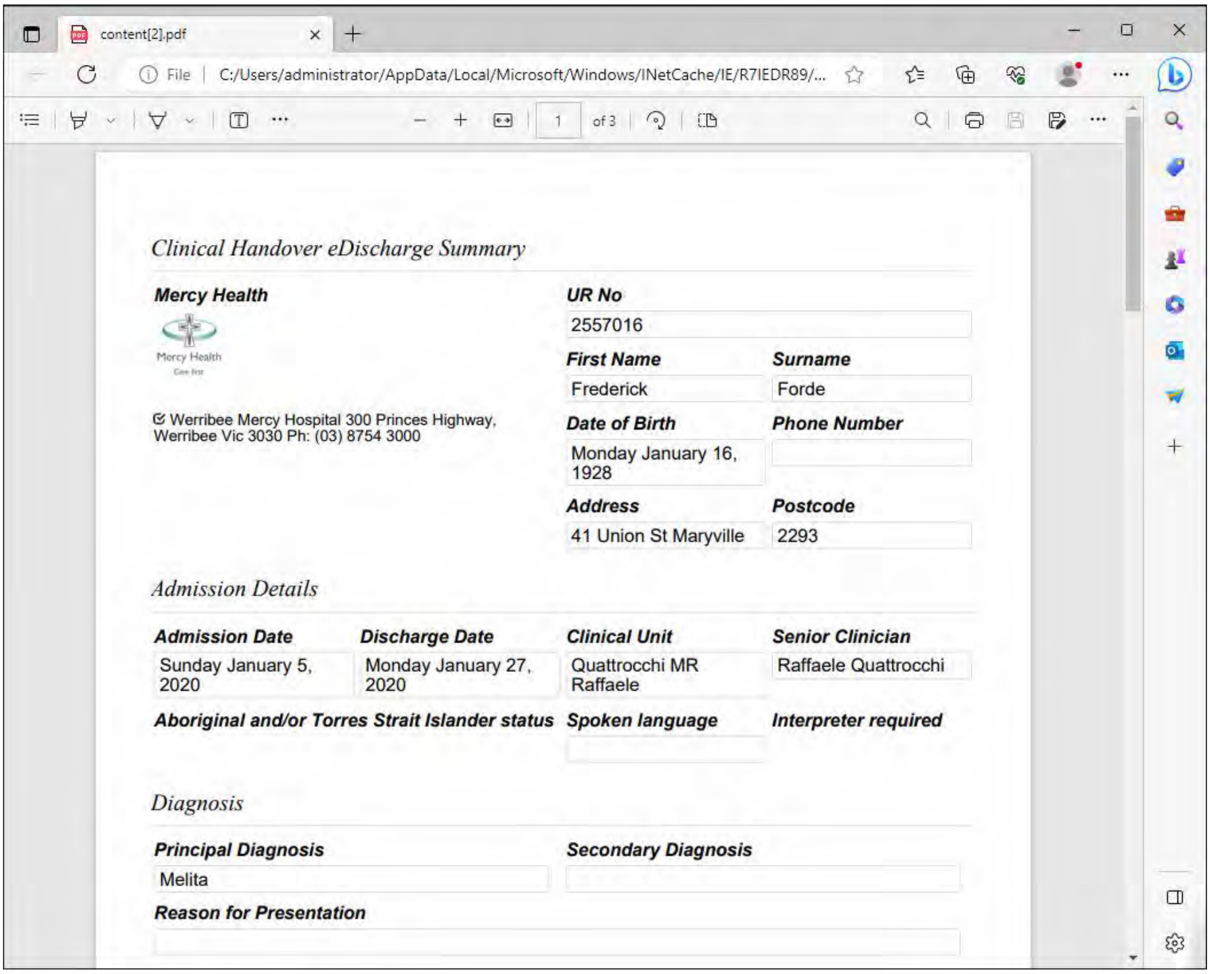
A default list of all documents that have been uploaded to MHR. These will be available in our traditional Manad Plus grid, so you can use or standard grouping, filtering and sorting options to find the document you are looking for.



Among the many types of documents you can access here, you'll find the client's **Discharge Summaries**.



A client's **Discharge Summary** may have **Attached Content** that you can access by clicking the hyperlink. The file will then load in your default PDF viewer application.



content[2].pdf

File | C:/Users/administrator/AppData/Local/Microsoft/Windows/INetCache/IE/R7IEDR89/...

1 of 3

Clinical Handover eDischarge Summary

Mercy Health	**UR No**	
Mercy Health	2557016	
	First Name	**Surname**
	Frederick	Forde
Werribee Mercy Hospital 300 Princes Highway, Werribee Vic 3030 Ph: (03) 8754 3000	**Date of Birth**	**Phone Number**
	Monday January 16, 1928	
	Address	**Postcode**
	41 Union St Maryville	2293

Admission Details

Admission Date	**Discharge Date**	**Clinical Unit**	**Senior Clinician**
Sunday January 5, 2020	Monday January 27, 2020	Quattrocchi MR Raffaele	Raffaele Quattrocchi

Aboriginal and/or Torres Strait Islander status	**Spoken language**	**Interpreter required**

Diagnosis

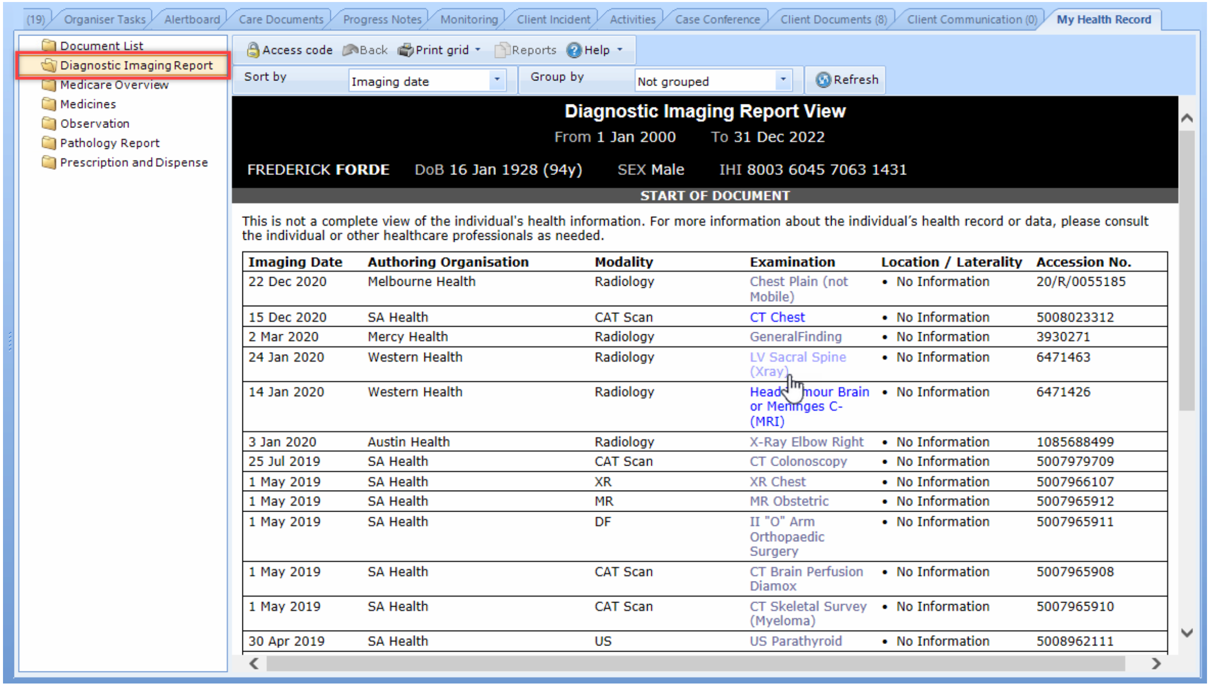
Principal Diagnosis	**Secondary Diagnosis**
Melita	

Reason for Presentation

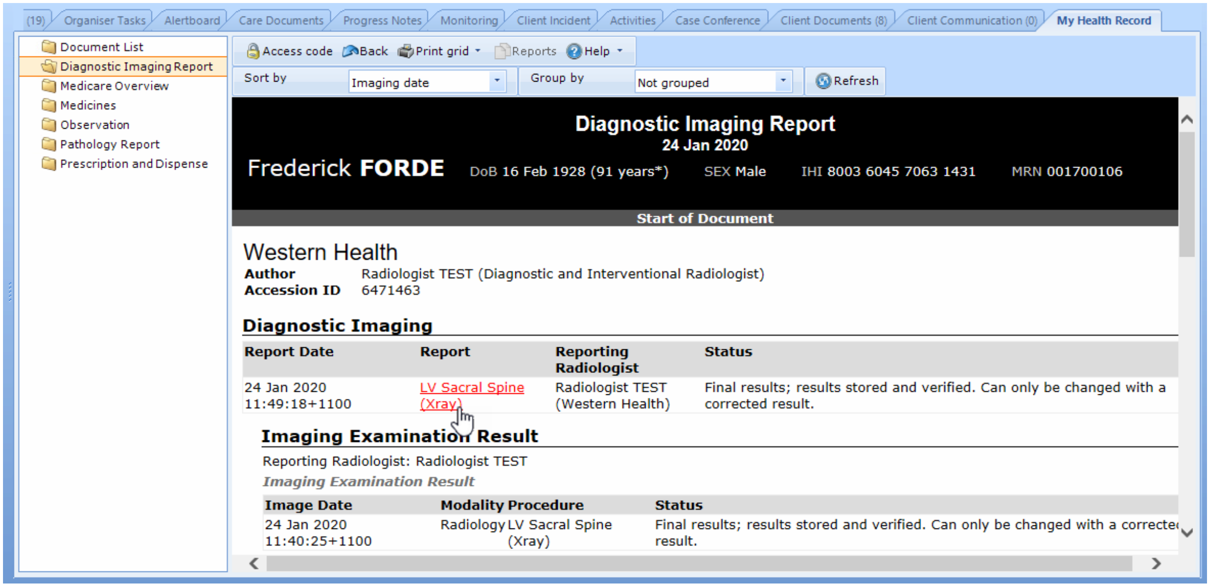
Diagnostic Imaging Report

The 'Diagnostic Imaging Reports Overview' shows you multiple diagnostic imaging reports within a specific date range on one page. This is an overview only, and not a complete medical history.

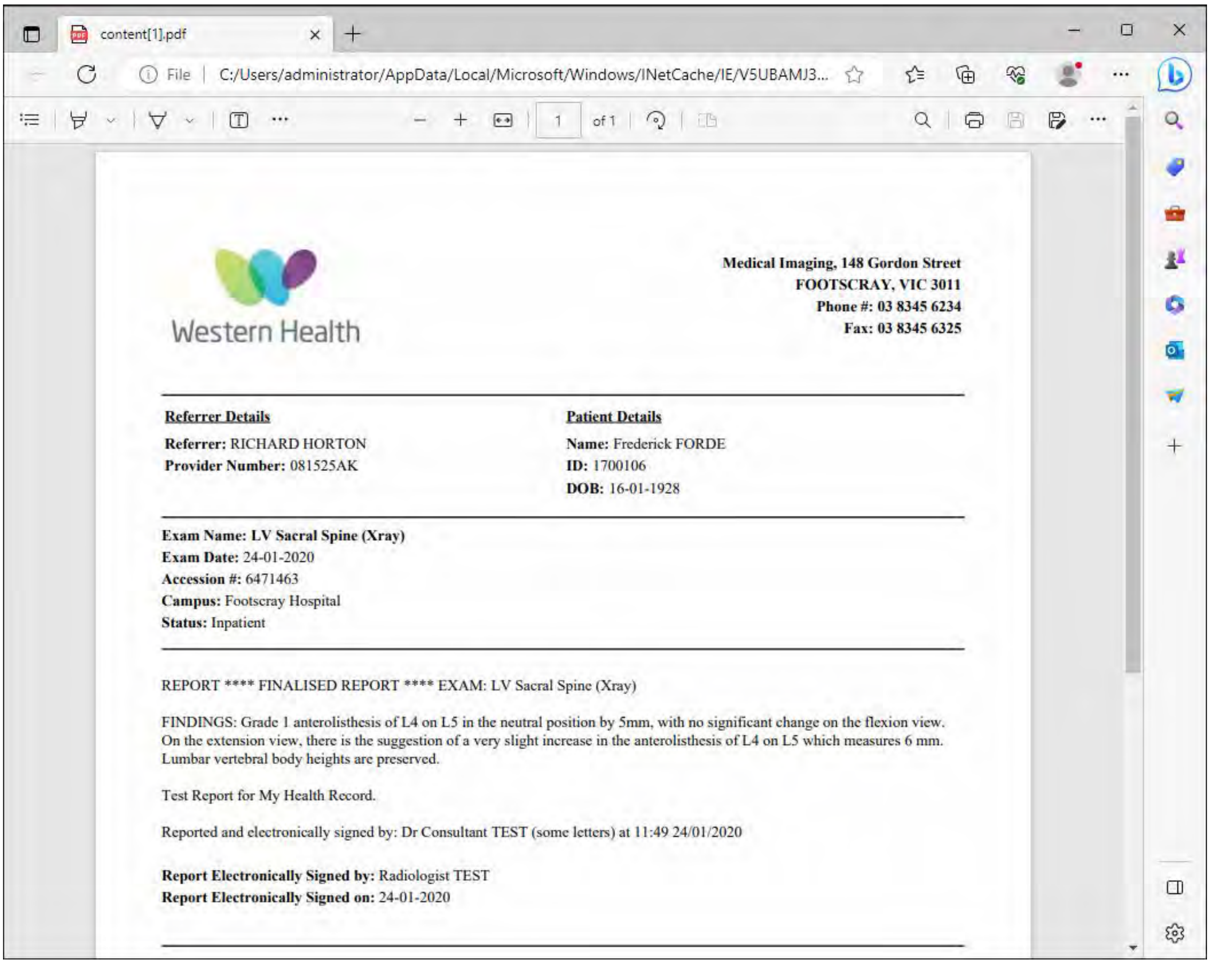
The diagnostic imaging results will be available in this list and you can click the hyperlink in the **Examination** column to access more detailed information.



From this screen, you can click the **Report Name** hyperlink to access a PDF of the pathology results.



The PDF file will then load in your default PDF viewer application.



Western Health

Medical Imaging, 148 Gordon Street
FOOTSCRAY, VIC 3011
Phone #: 03 8345 6234
Fax: 03 8345 6325

Referrer Details
Referrer: RICHARD HORTON
Provider Number: 081525AK

Patient Details
Name: Frederick FORDE
ID: 1700106
DOB: 16-01-1928

Exam Name: LV Sacral Spine (Xray)
Exam Date: 24-01-2020
Accession #: 6471463
Campus: Footscray Hospital
Status: Inpatient

REPORT **** FINALISED REPORT **** EXAM: LV Sacral Spine (Xray)

FINDINGS: Grade 1 anterolisthesis of L4 on L5 in the neutral position by 5mm, with no significant change on the flexion view. On the extension view, there is the suggestion of a very slight increase in the anterolisthesis of L4 on L5 which measures 6 mm. Lumbar vertebral body heights are preserved.

Test Report for My Health Record.

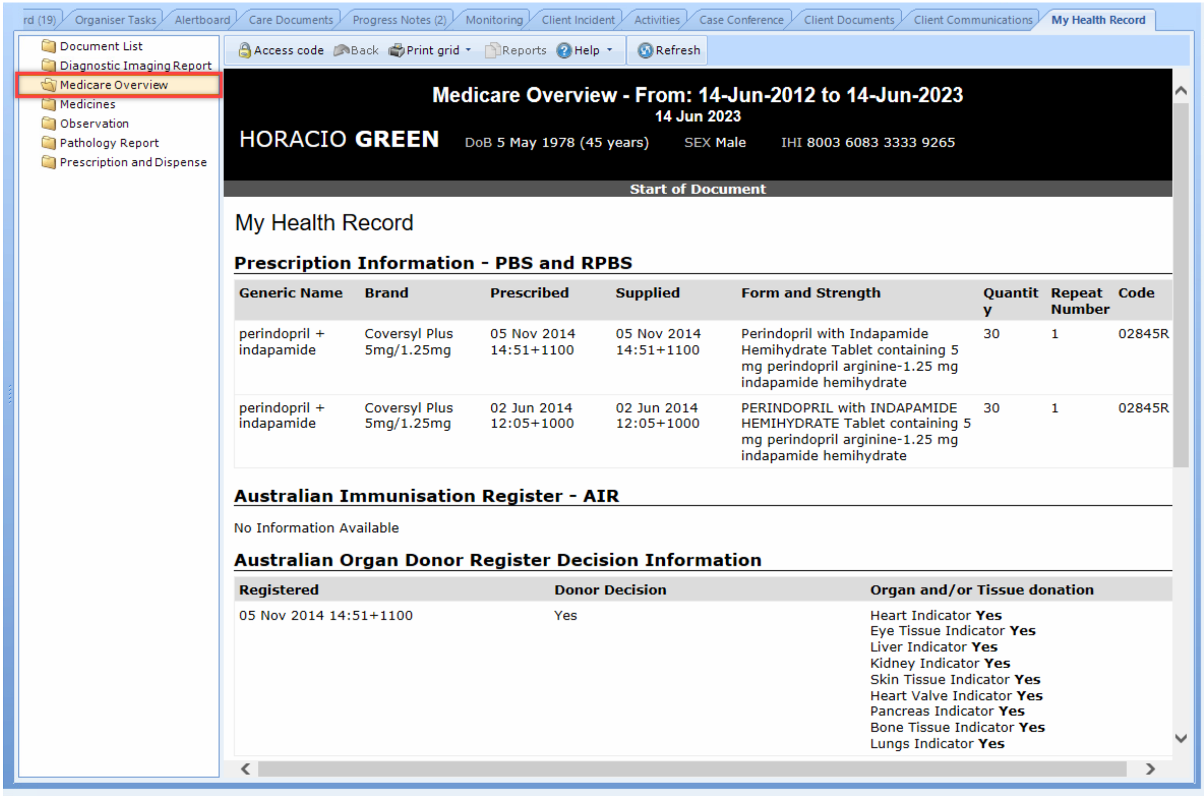
Reported and electronically signed by: Dr Consultant TEST (some letters) at 11:49 24/01/2020

Report Electronically Signed by: Radiologist TEST
Report Electronically Signed on: 24-01-2020

Medicare Overview

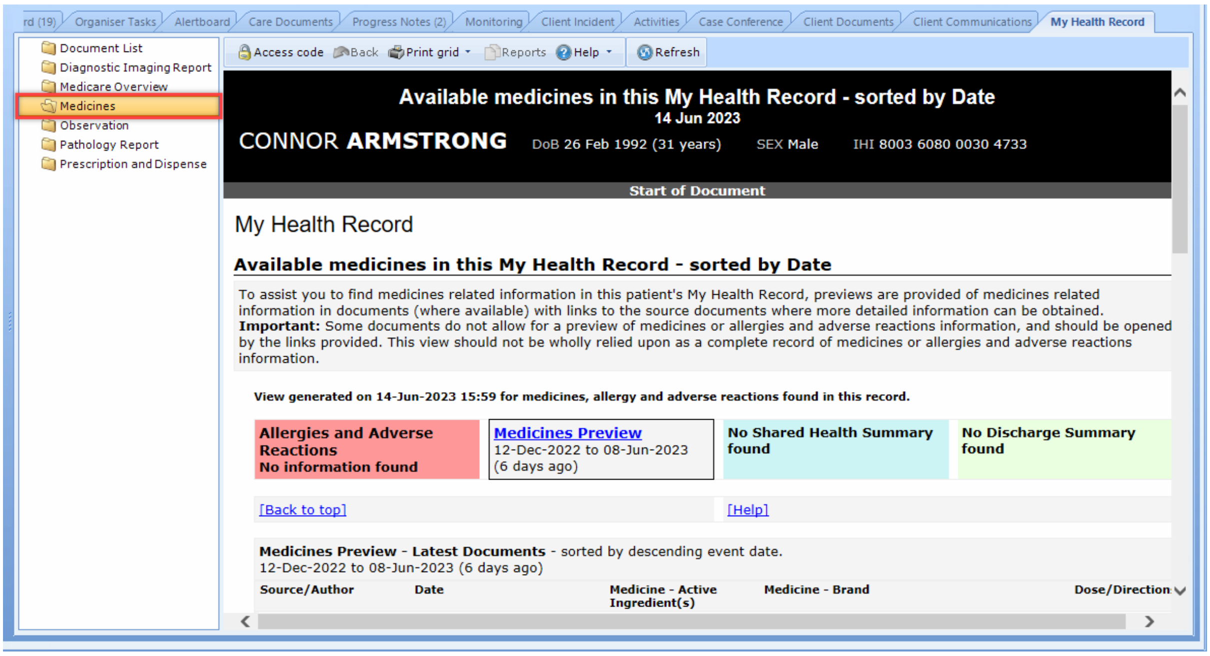
This may include…

- PBS/RPBS claims information
- Australian Organ Donor Register status
- Australian Immunisation Register
- MBS/DVA claims information



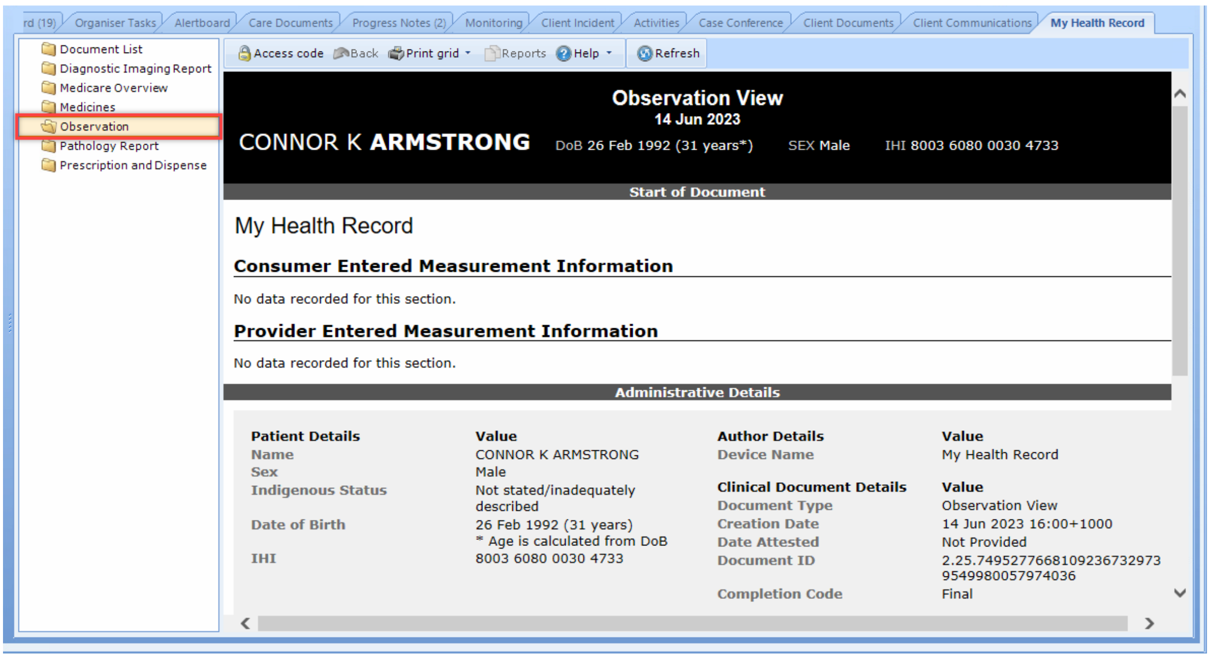
Medicines

This view brings together medicines-related information, including allergies and adverse reactions, from documents held in a patient's record.



Observation

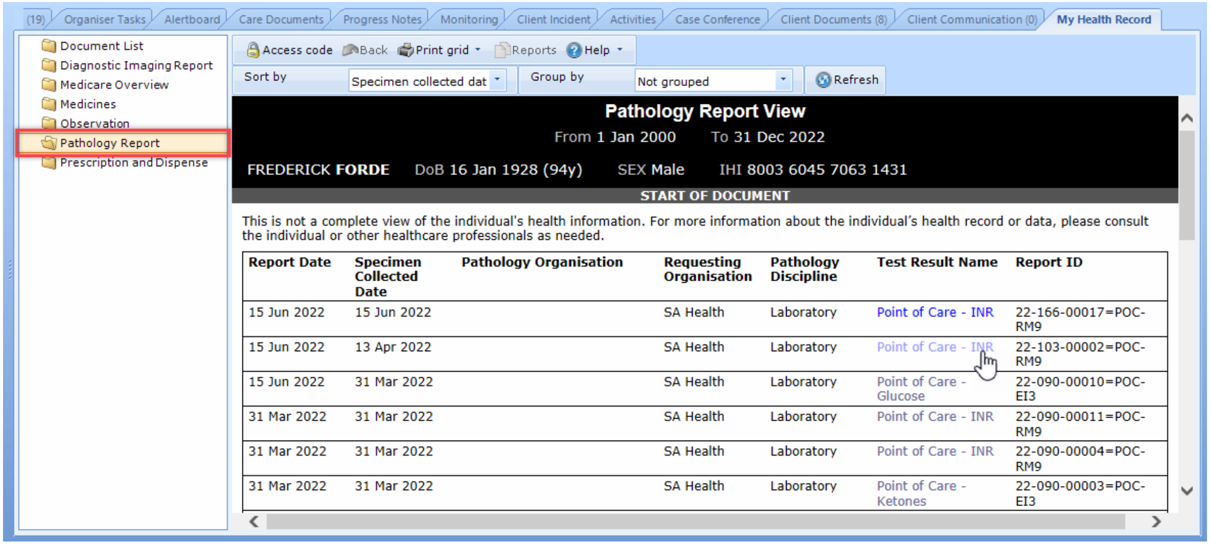
This will provide the client's observation records, if available on MHR.



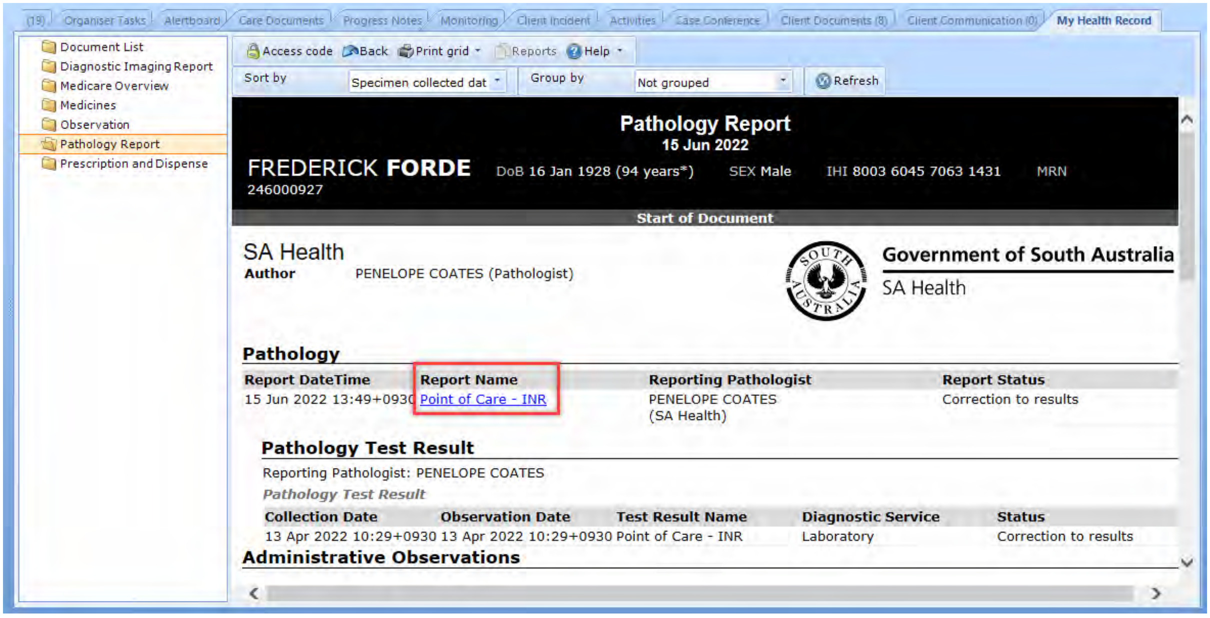
Pathology Report

The 'Pathology Reports Overview' shows you multiple pathology reports within a specific date range on one page. This is an overview only, and not a complete medical history.

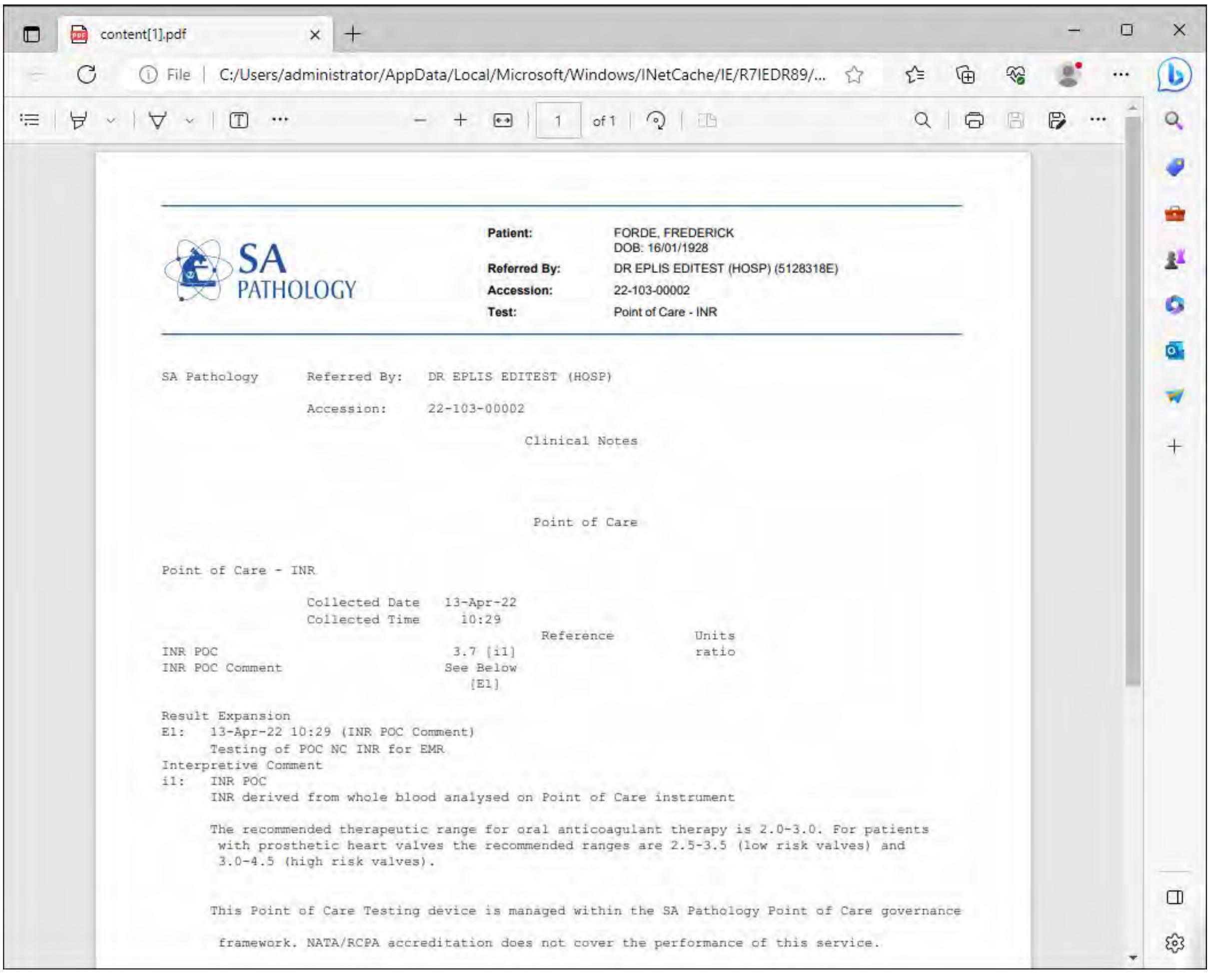
The pathology results will be available in this list and you can click the hyperlink in the **Test Result Name** column to access more detailed information.



From this screen, you can click the **Report Name** hyperlink to access a PDF of the pathology results.



The PDF file will then load in your default PDF viewer application.



SA PATHOLOGY

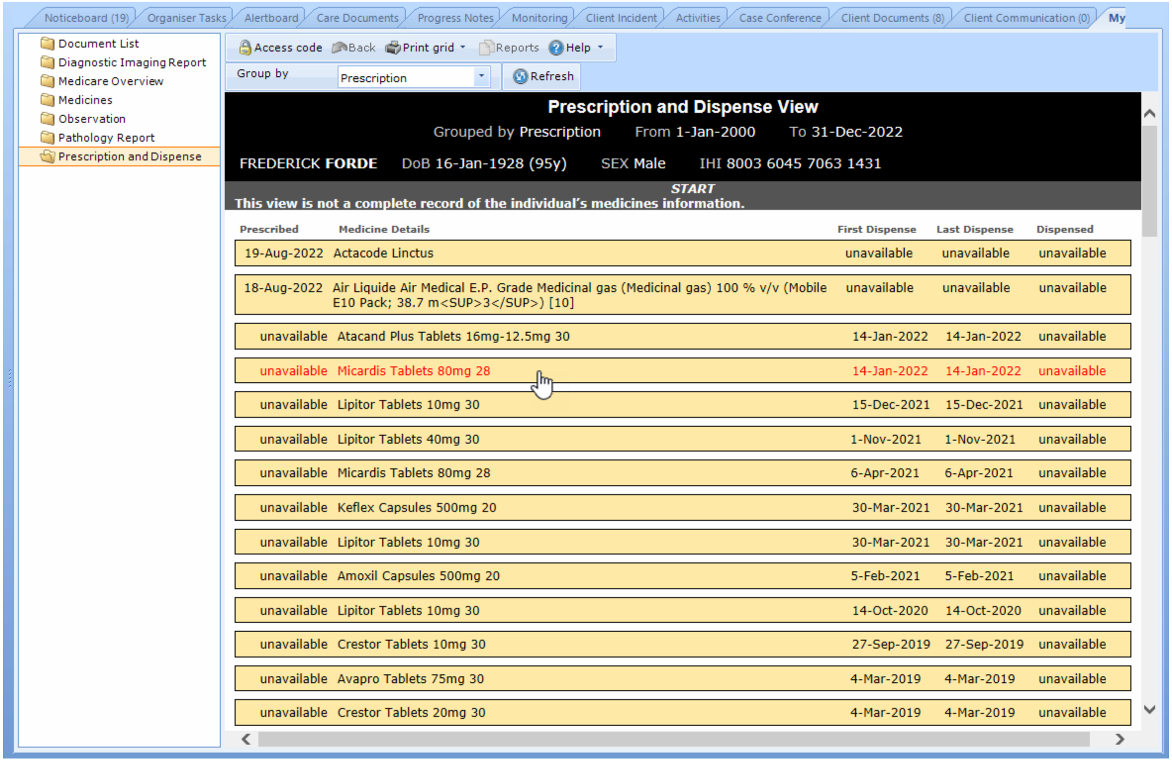
Patient: FORDE, FREDERICK
DOB: 16/01/1928
Referred By: DR EPLIS EDITEST (HOSP) (5128318E)
Accession: 22-103-00002
Test: Point of Care - INR

```
SA Pathology      Referred By:   DR EPLIS EDITEST (HOSP)

                  Accession:     22-103-00002

                                             Clinical Notes


                                              Point of Care

Point of Care - INR

                  Collected Date   13-Apr-22
                  Collected Time      10:29
                                                 Reference          Units
INR POC                              3.7 [i1]                       ratio
INR POC Comment                    See Below
                                       [E1]

Result Expansion
E1:    13-Apr-22 10:29 (INR POC Comment)
       Testing of POC NC INR for EMR
Interpretive Comment
i1:    INR POC
       INR derived from whole blood analysed on Point of Care instrument

       The recommended therapeutic range for oral anticoagulant therapy is 2.0-3.0. For patients
        with prosthetic heart valves the recommended ranges are 2.5-3.5 (low risk valves) and
        3.0-4.5 (high risk valves).


       This Point of Care Testing device is managed within the SA Pathology Point of Care governance

        framework. NATA/RCPA accreditation does not cover the performance of this service.
```

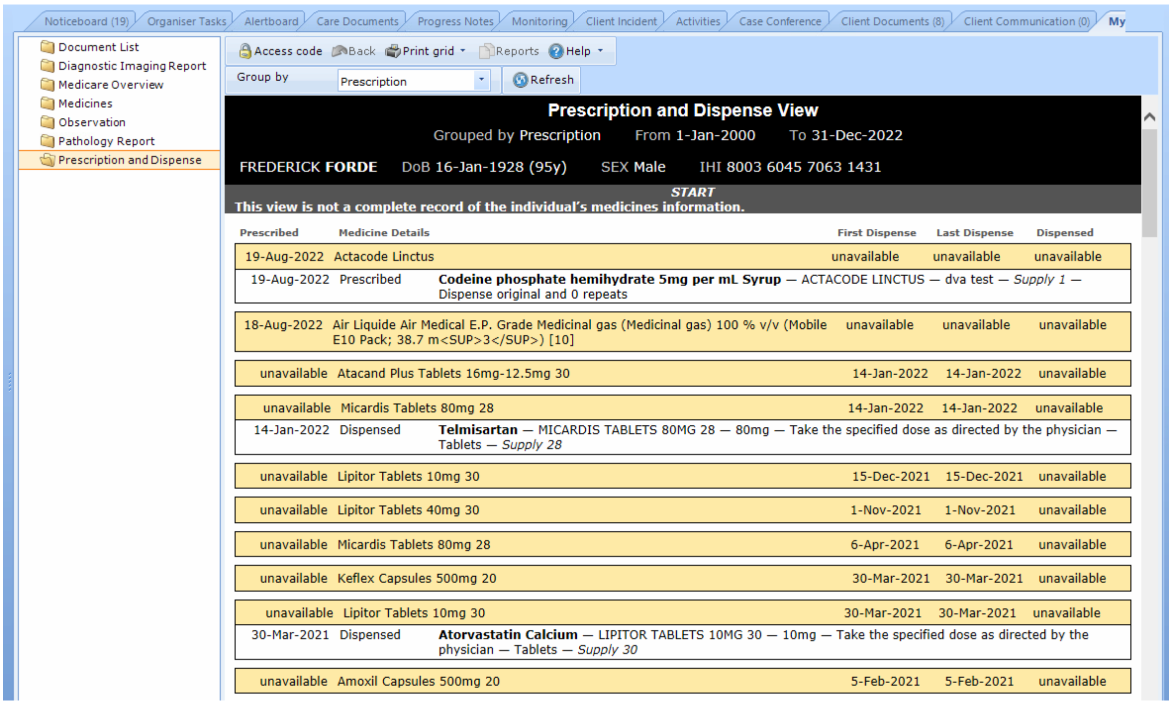
Prescription and Dispense

Prescription and dispense records contain information about medicines that have been prescribed and dispensed, and details about both the healthcare provider that prescribed or dispensed the medicine(s) and the healthcare organisation.

By default, all of the **Medicine Details** will be collapsed (i.e. hidden). You can click on the relevant yellow row to expand these details.



When expanded, you will see additional details of the medication.



What to do when a code is required to access a client’s MHR

MHR is built to make your client’s health information more safe and secure. Only healthcare providers giving medical care can look at someone’s My Health Record, but if your clients want extra privacy, they can set custom access codes at any time.

When a client has set an access code, they will need to give you this code so you can look at their My Health Record information. If you have already entered the code for a client once, you will not need to do this again unless the client revokes your access.

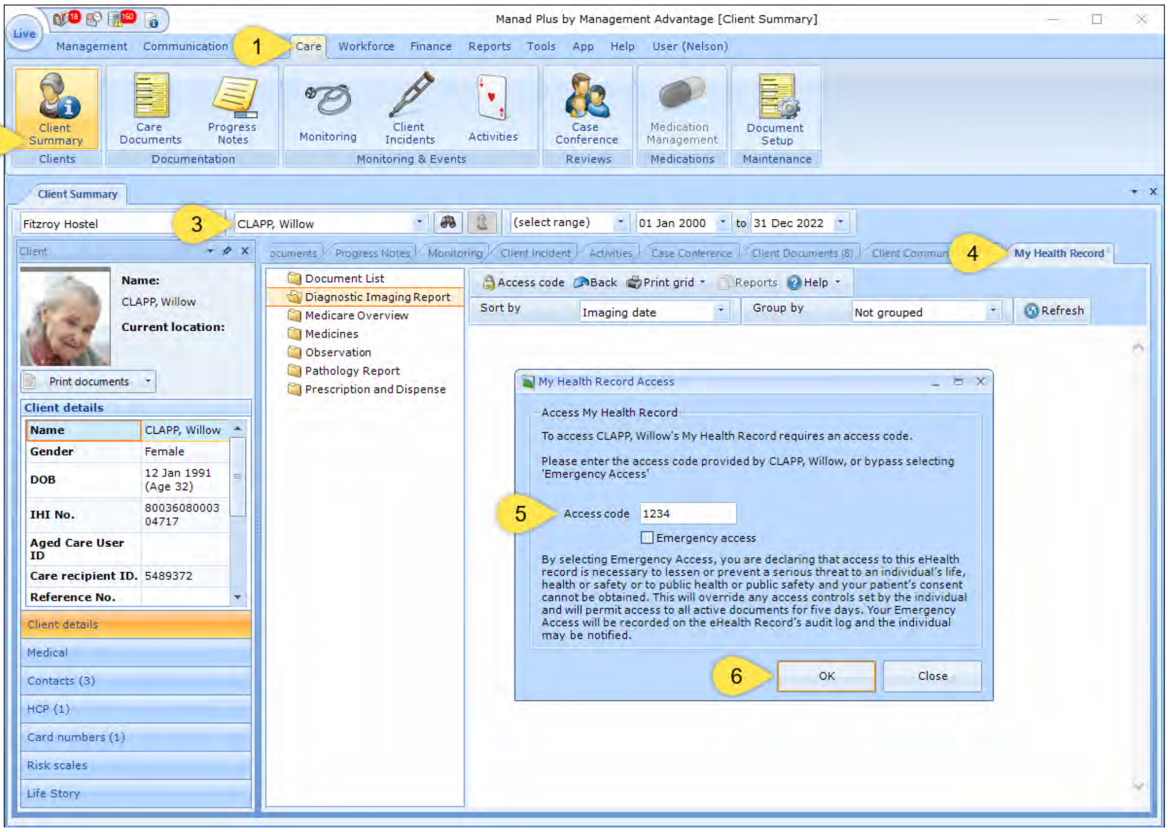
For more information, see [Manage who can access your record with a record access code](#).

---

1. Go to the **Care** module tab.
2. Open the **Client Summary** feature.
3. Select the relevant client using the drop-down tool.
4. Click to open the **My Health Record** tab.

If the selected client has set an **Access code**, the **My Health Record Access** form should load to the front of the screen.

5. Enter the **Access code**.
6. Then click **OK**.



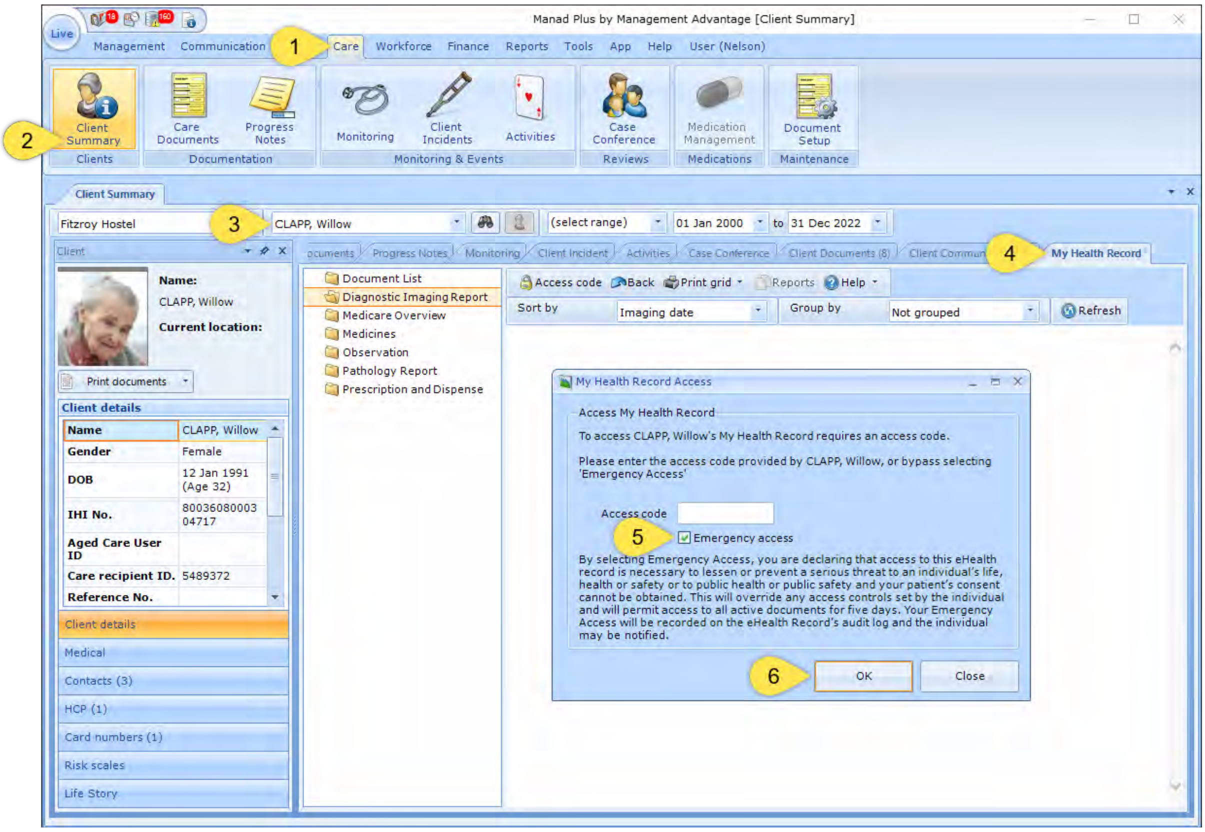
What to do when a client's access code is unknown during an emergency

If you do not have the **Access code** for a client during an emergency, such as a life or death scenario, and you need to access their My Health Record immediately, you can use the **Emergency access** option to enable access for all users working in the client's location for 5 days.

1. Go to the **Care** module tab.
2. Open the **Client Summary** feature.
3. Select the relevant client using the drop-down tool.
4. Click to open the **My Health Record** tab.

If the selected client has set an **Access code**, the **My Health Record Access** form should load to the front of the screen.

5. Tick the **Emergency access** checkbox.
6. Then click **OK**.



How to upload an Advance Care Plan to MHR

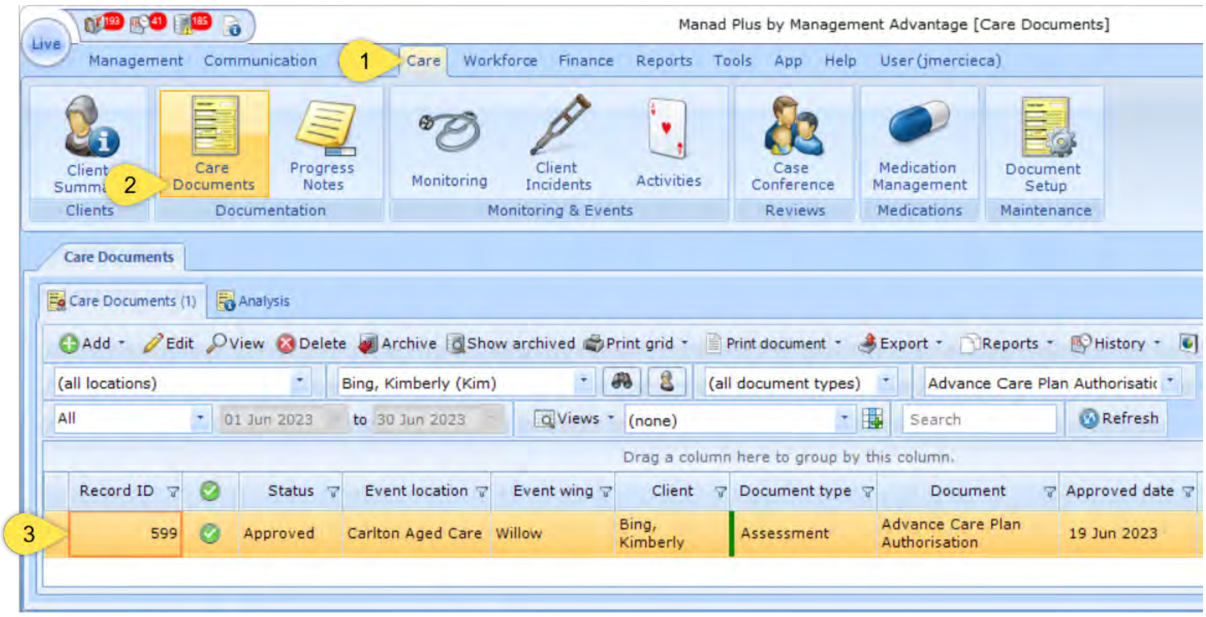
Reminder: To upload **Advance Care Plan** documents to MHR, you must first complete:

- Step 4: Get the HPI-Is for your staff members
- Step 8: Update client consent to upload an Advance Care Plan to MHR.

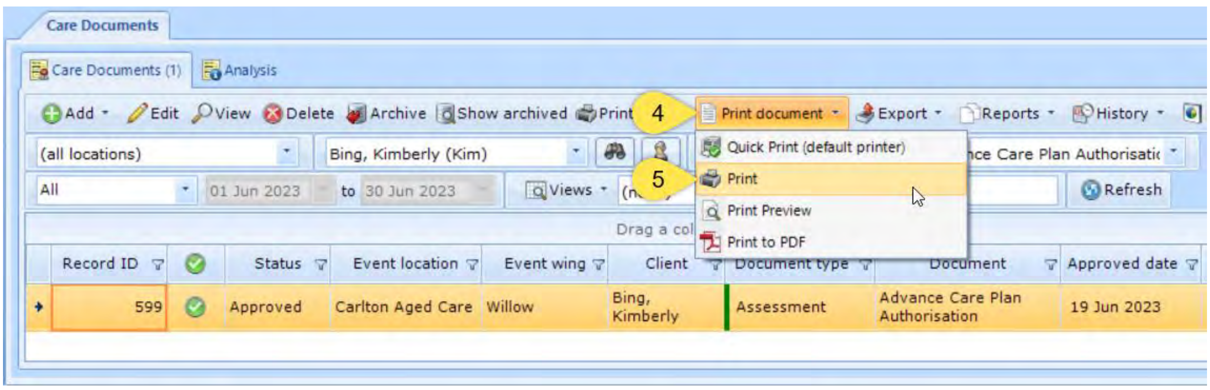
If the client's Advance Care Plan was completed in Manad Plus, please read from step 1 below.

If the client has an Advance Care Plan that was completed externally, please skip to step 6 on the next page.

1. Go to the **Care** module tab.
2. Open the **Care Documents** feature.
3. Select the client's **Approved Advance Care Plan** from the grid.



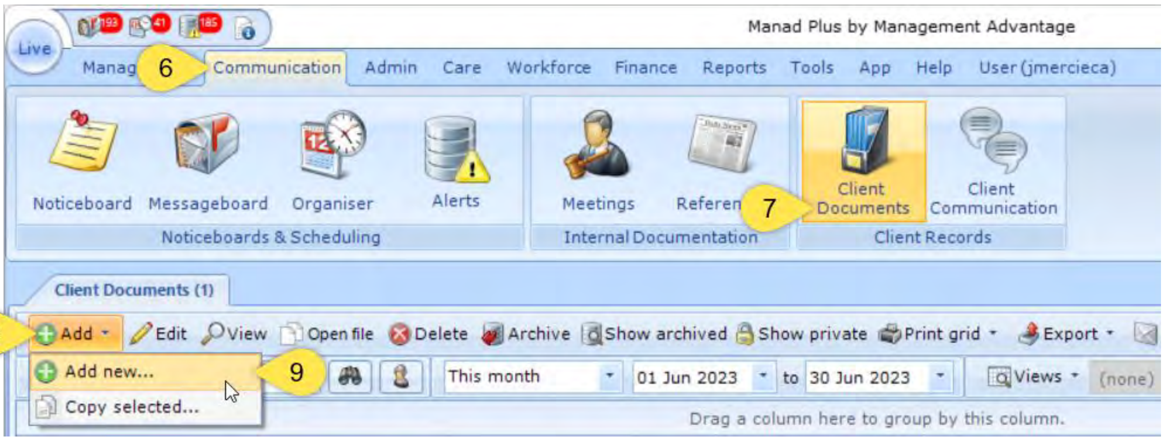
4. Click the **Print document** button in the toolbar.
5. Select **Print** to choose from your available printer options.



Once the **Advance Care Plan** has been printed, you will need to have it signed, then scan the signed copy, save it as a PDF file and upload it to Manad Plus.

IMPORTANT: The signed document must be saved as a PDF file, as MHR only accepts this type of file.

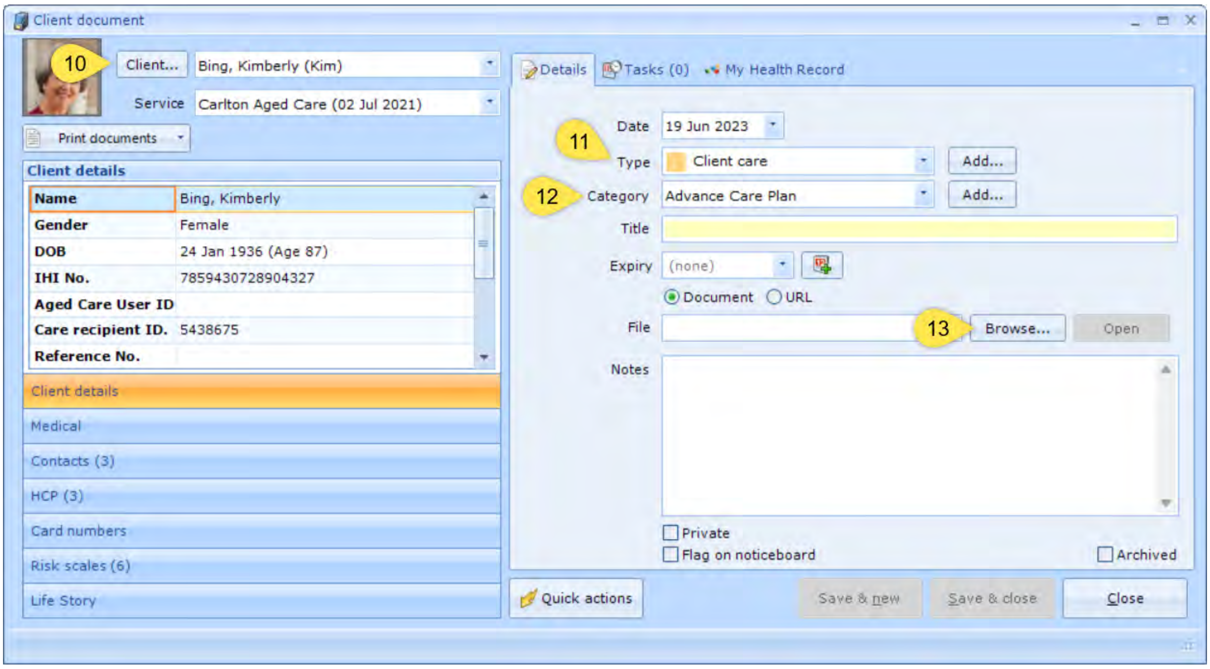
6. Go the **Communication** module tab.
7. Open the **Client Documents** feature.
8. Click the **Add** button in the toolbar.
9. Select **Add new…**



10. Click the **Client** drop-down to select from all current clients <u>OR</u> click the **Client** button to choose from the full client list.
11. Enter the **Type** using the drop-down options.
12. Then set the **Category** as **Advance Care Plan**.

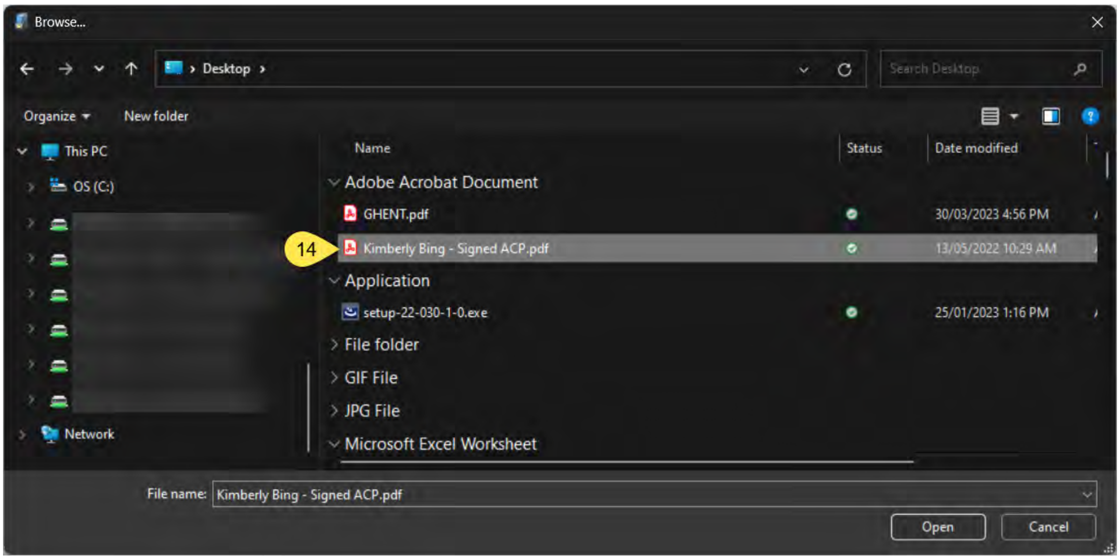
Note: The **My Health Record** tab will only be enabled if this **Category** is chosen.

13. In the **File** field, click the **Browse…** button.

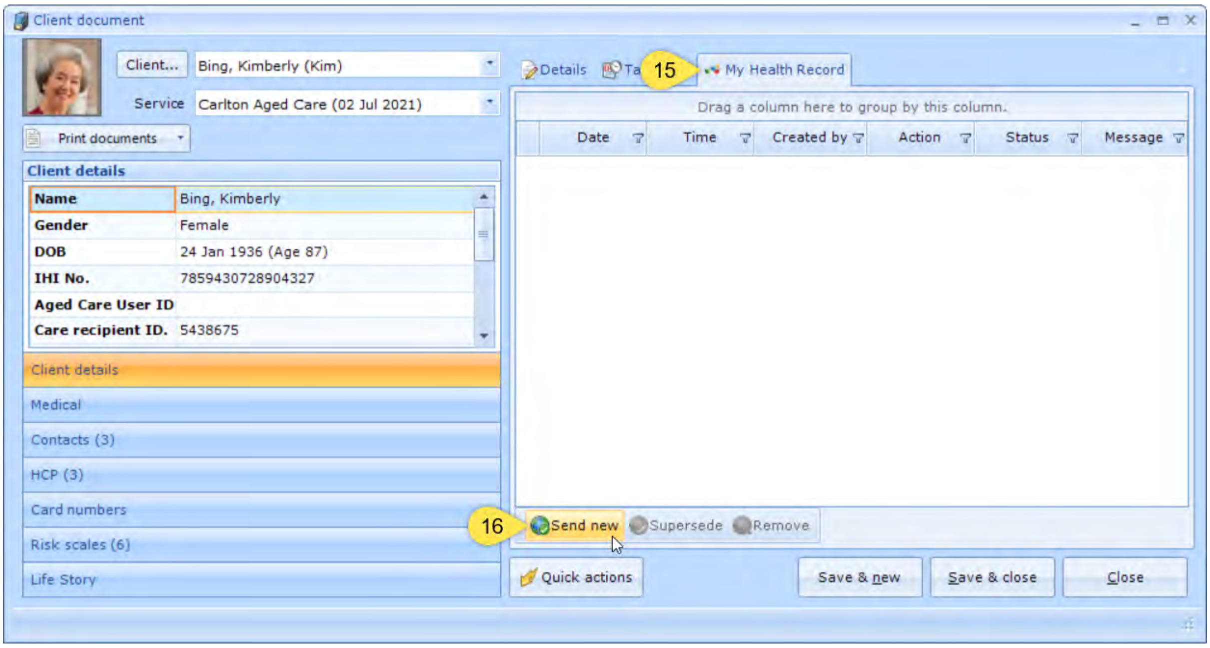


14. Find and open the scanned PDF file on your computer/shared folder.

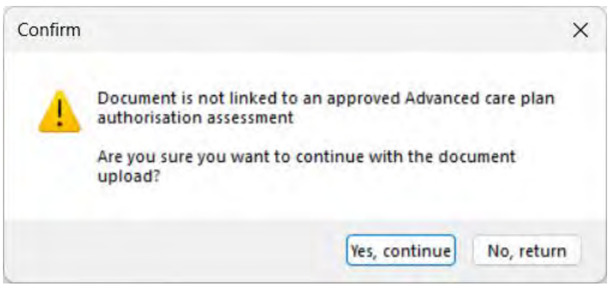
IMPORTANT: MHR only accepts PDF files.



15. Click to open the **My Health Record** tab.
16. Click the **Send new** button.



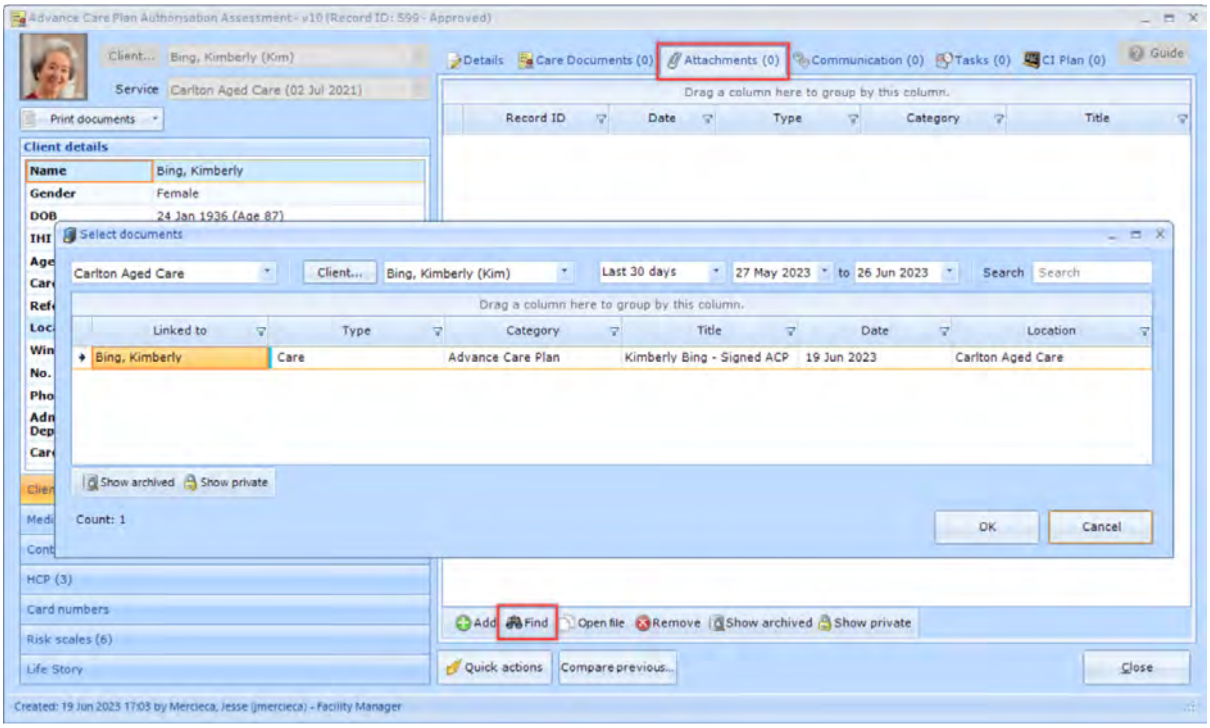
As you have not yet linked the **Client Document** to the **Advance Care Plan Authorisation**, you will get this prompt. You can just click **Yes, continue** to upload the document without a link.



However, if you do want to link the **Client Document** to the **Advance Care Plan Authorisation** before uploading it to MHR you should click **No, return** and save the record first.

Once saved, go back to the **Care Documents** feature, select the authorisation record and click the **View** button in the toolbar.

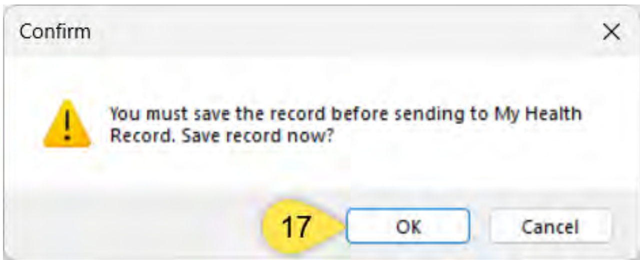
In the **Attachments** tab, you can then use the **Find** button to link the relevant **Client Document** record to the authorisation record. Once the record is visible in this tab, it will be linked and you can simply **Close** the authorisation form.



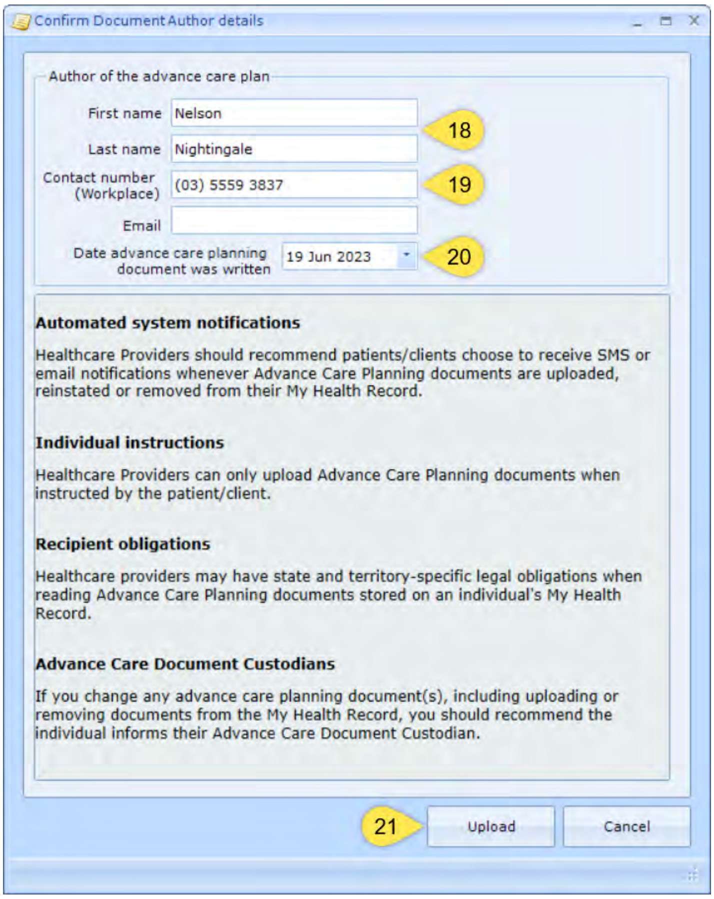
Now go back to **Client Documents**, select the relevant record from the grid and click the **Edit** button in the toolbar.

Then navigate back to the **My Health Record** tab and click **Send new**.

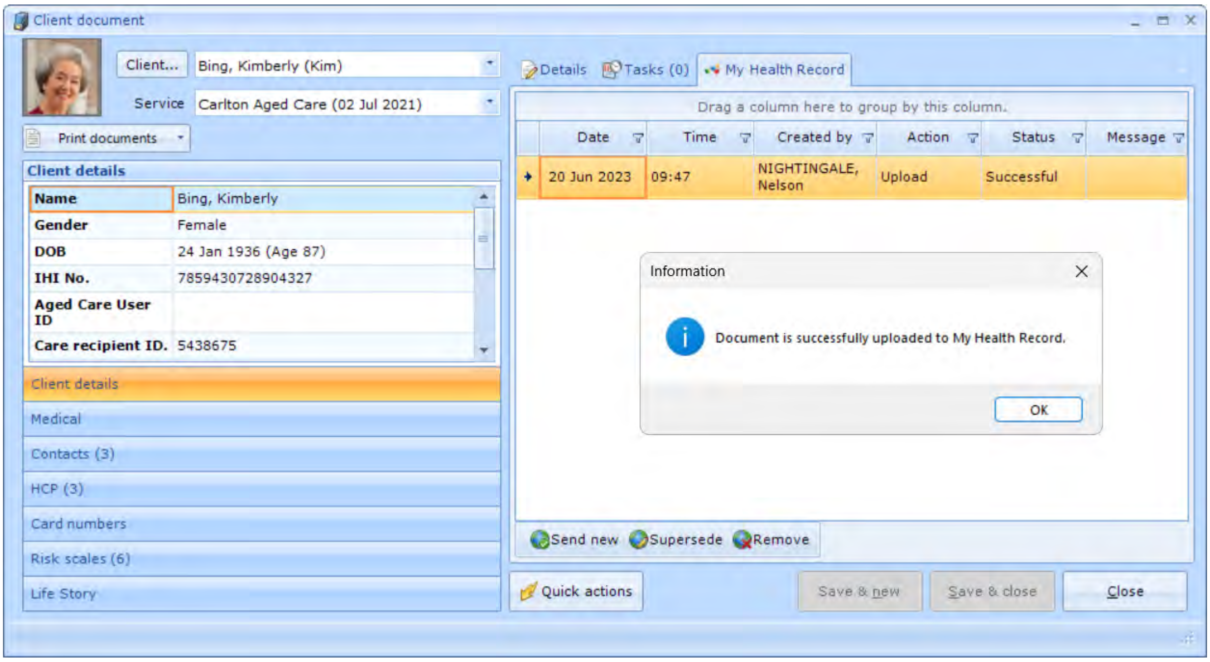
17. If you chose to continue without linking the document to the authorisation record, you will be given another prompt to save the **Client Document** before continuing. Just click **OK** to continue.



18. Enter the **First name** and **Last name** of the **Author of the advance care plan**.
19. Enter their **Contact number**. (Note: You can also enter their **Email**, but this is optional).
20. Enter the **Date** using the drop-down calendar tool.
21. Then click to **Upload**.



If the upload was successful, you will receive a confirmation message onscreen and the MHR record will be stored in the tab.



How to upload a Progress Note to MHR

When you upload a **Progress Note** to MHR, it will be sent as an **Event Summary**.

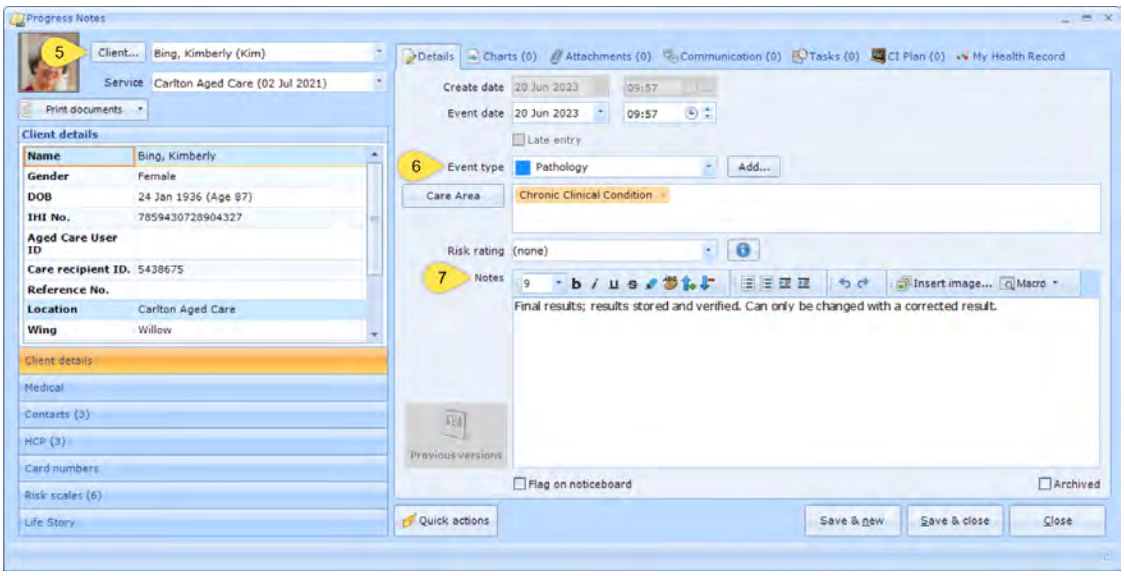
Event Summaries should be used for sharing information about a ***significant*** healthcare event that could be relevant to the ongoing care of an individual. Therefore, this should only be done for critical data necessary in a client's My Health Record.

1. Go to the **Care** module tab.
2. Open the **Progress Notes** feature.
3. Click the **Add** button in the toolbar.
4. Select **Add new…**

5. Click the **Client** drop-down to select from all current clients <u>OR</u> click the **Client** button to choose from the full client list.
6. Enter the **Event type** using the drop-down options.

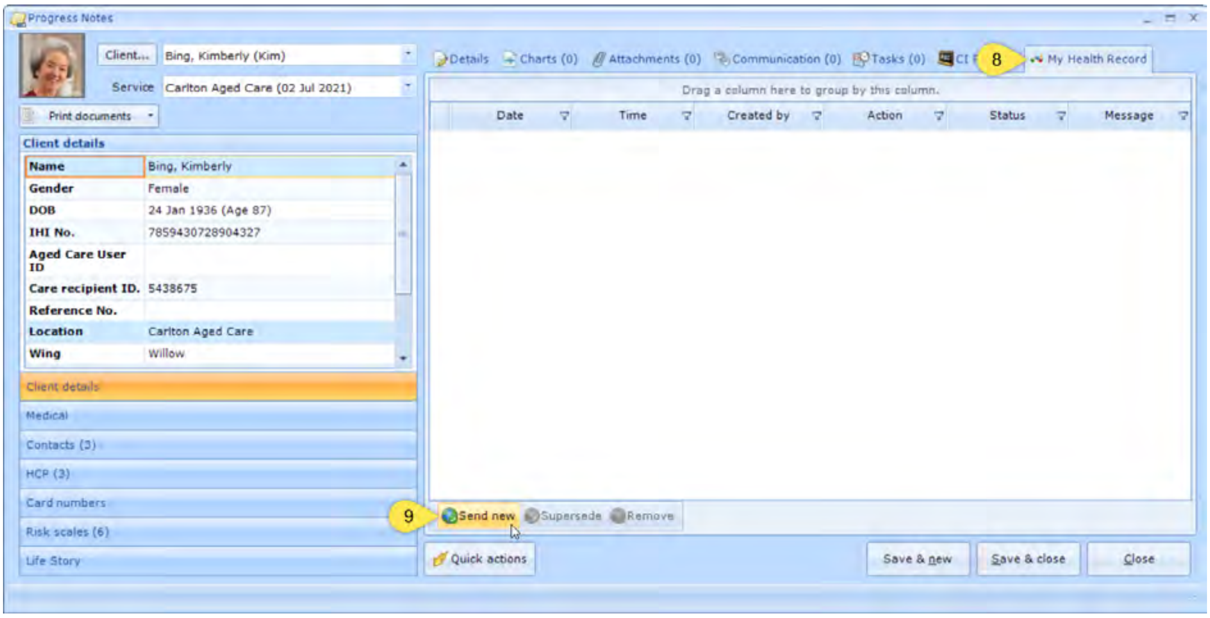
Enter any other relevant information in the other non-mandatory fields.

7. Enter the **Notes** for the record.

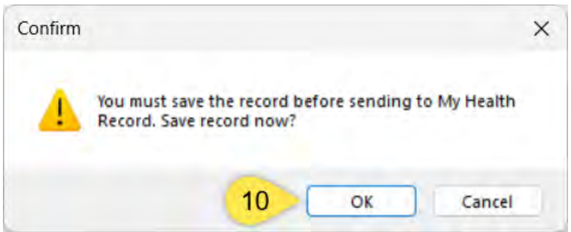


8. Click to open the **My Health Record** tab.
9. Click the **Send new** button.

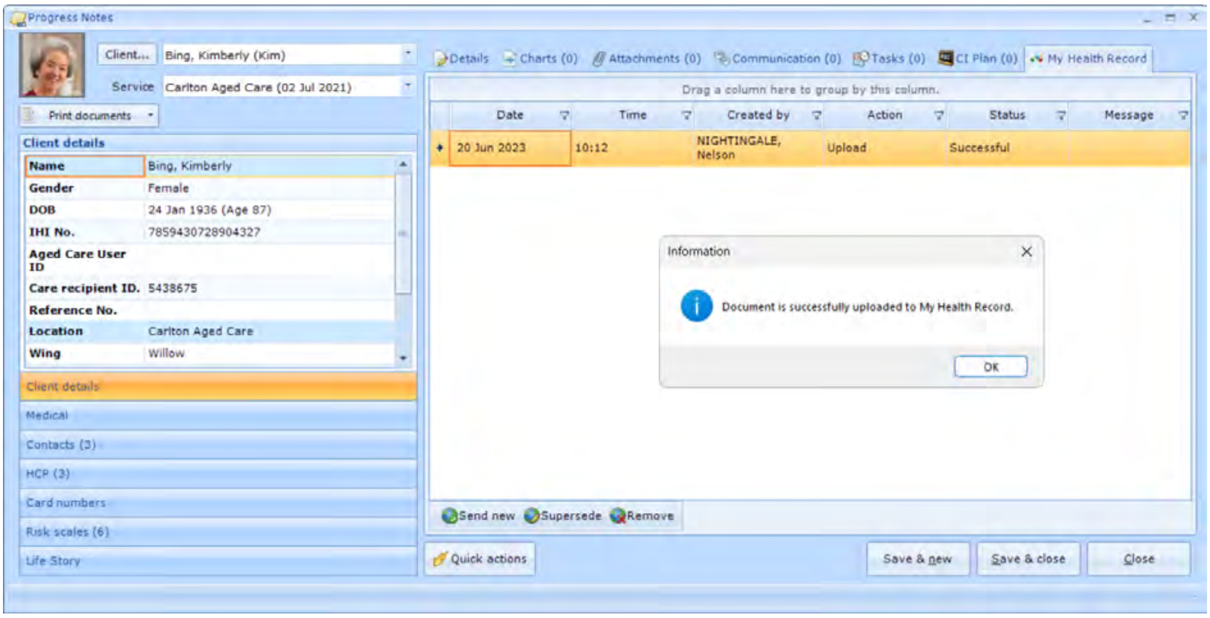
Reminder: You must have a valid **HPI-I**. See Step 4: Get the HPI-Is for your staff members.



10. Click **OK** to save the record before sending to MHR.



If the upload was successful, you will receive a confirmation message onscreen and the MHR record will be stored in the tab.



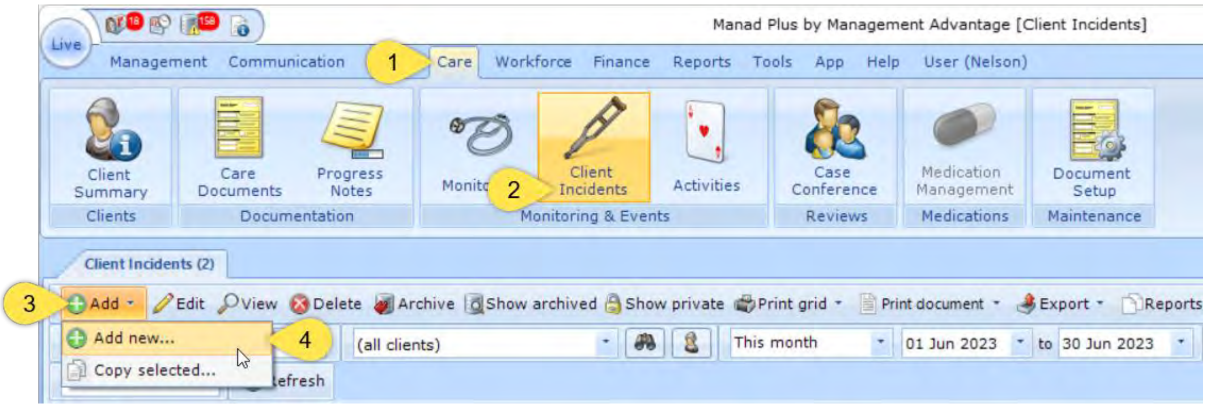
How to upload a Client Incident to MHR

When you upload a **Client Incident** to MHR, it will be sent as an **Event Summary**.

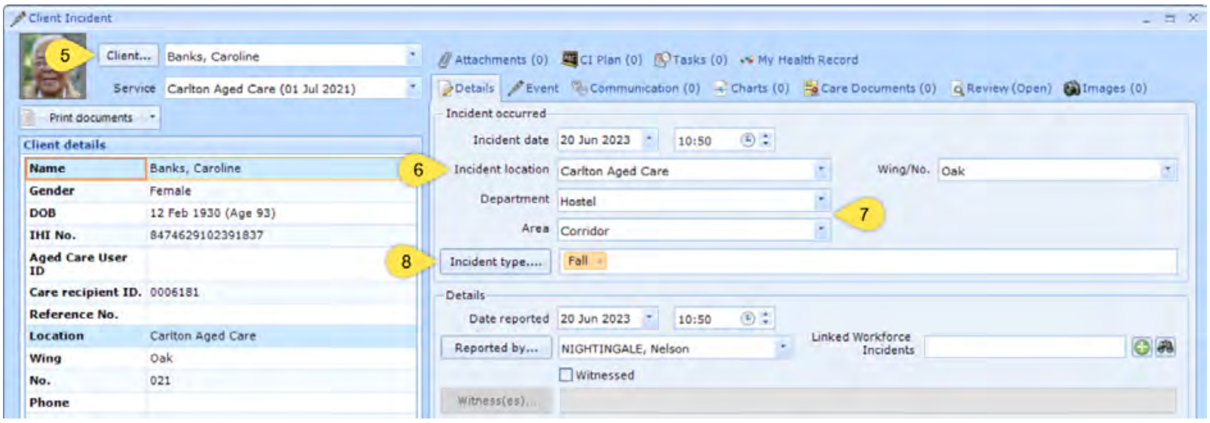
Event Summaries should be used for sharing information about a ***significant*** healthcare event that could be relevant to the ongoing care of an individual. Therefore, this should only be done for critical data necessary in a client's My Health Record.

Reminder: You must also have a valid **HPI-I**. See Step 4: Get the HPI-Is for your staff members.

1. Go to the **Care** module tab.
2. Open the **Client Incidents** feature.
3. Click the **Add** button in the toolbar.
4. Select **Add new…**

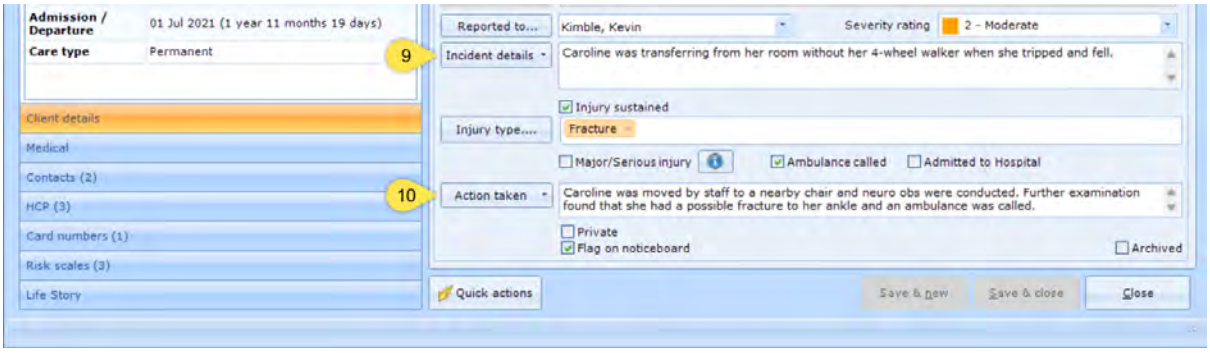


5. Click the **Client** drop-down to select from all current clients <u>OR</u> click the **Client** button to choose from the full client list.
6. Enter the **Incident location** using the drop-down options.
7. Enter the **Department** using the drop-down options, then enter the corresponding **Area**.
8. Enter the **Incident type**.



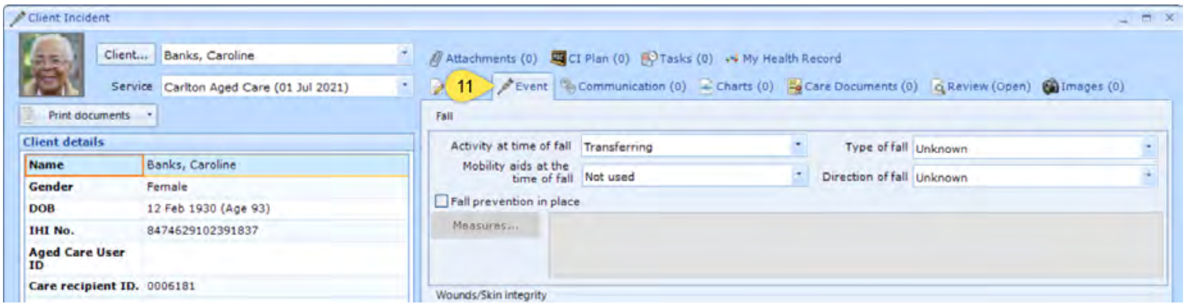
9. Enter the **Incident details**.
10. Enter the **Action taken**.

Enter any other relevant information in the remaining non-mandatory fields.

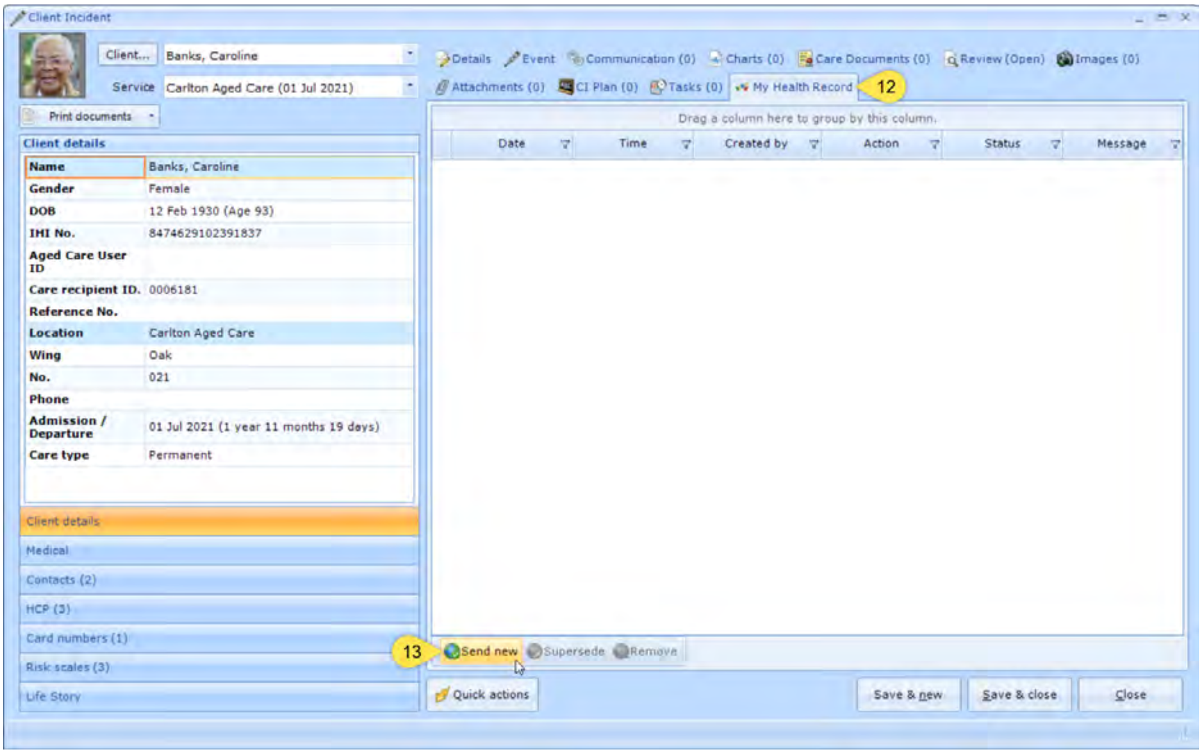


11. Click to open the **Event** tab and enter information in the relevant fields.

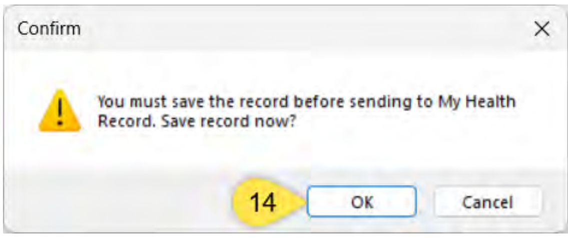
The sections that are enabled in this tab will depend on the **Incident type(s)** chosen in the **Details** tab. Some sections here will be mandatory to complete, while others may not be.



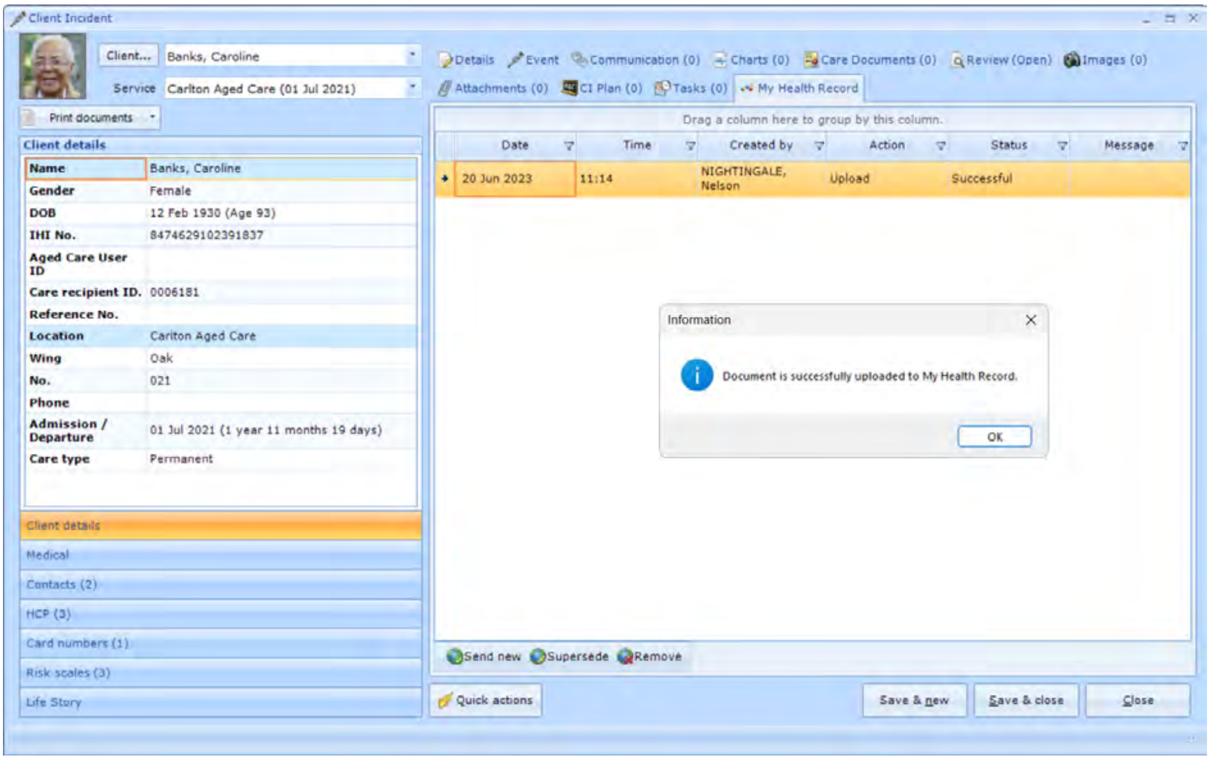
12. Click to open the **My Health Record** tab.
13. Click the **Send new** button.



14. Click **OK** to save the record before sending to MHR.



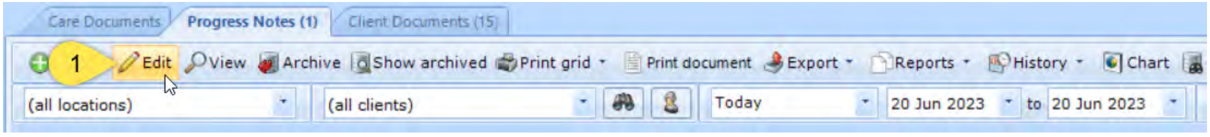
If the upload was successful, you will receive a confirmation message onscreen and the MHR record will be stored in the tab.



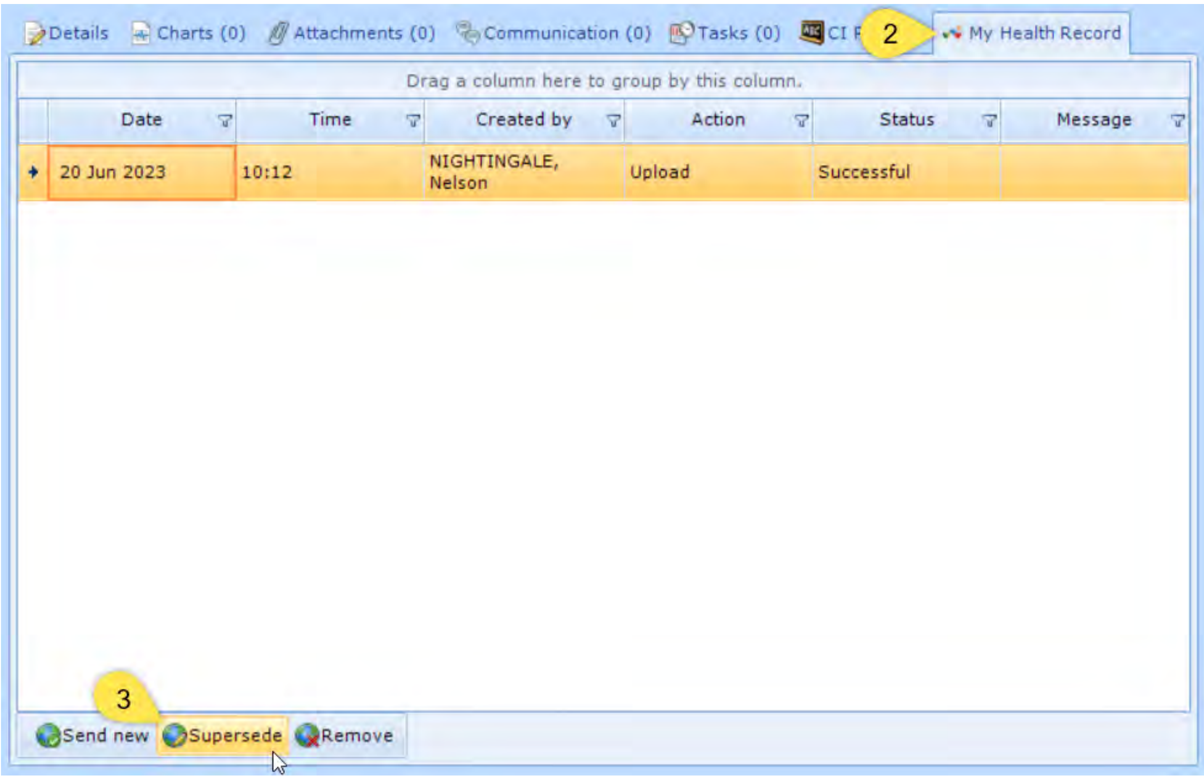
How to replace a document uploaded to MHR

If you have uploaded the incorrect information to MHR via **Client Documents** (Advance Care Plan), **Progress Notes** or **Client Incidents**, or you want to update the details of the submitted document for any other reason, this can be done using the following steps.

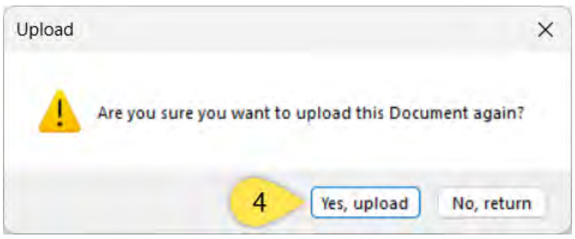
1. Find the relevant record and click the **Edit** button in the toolbar.



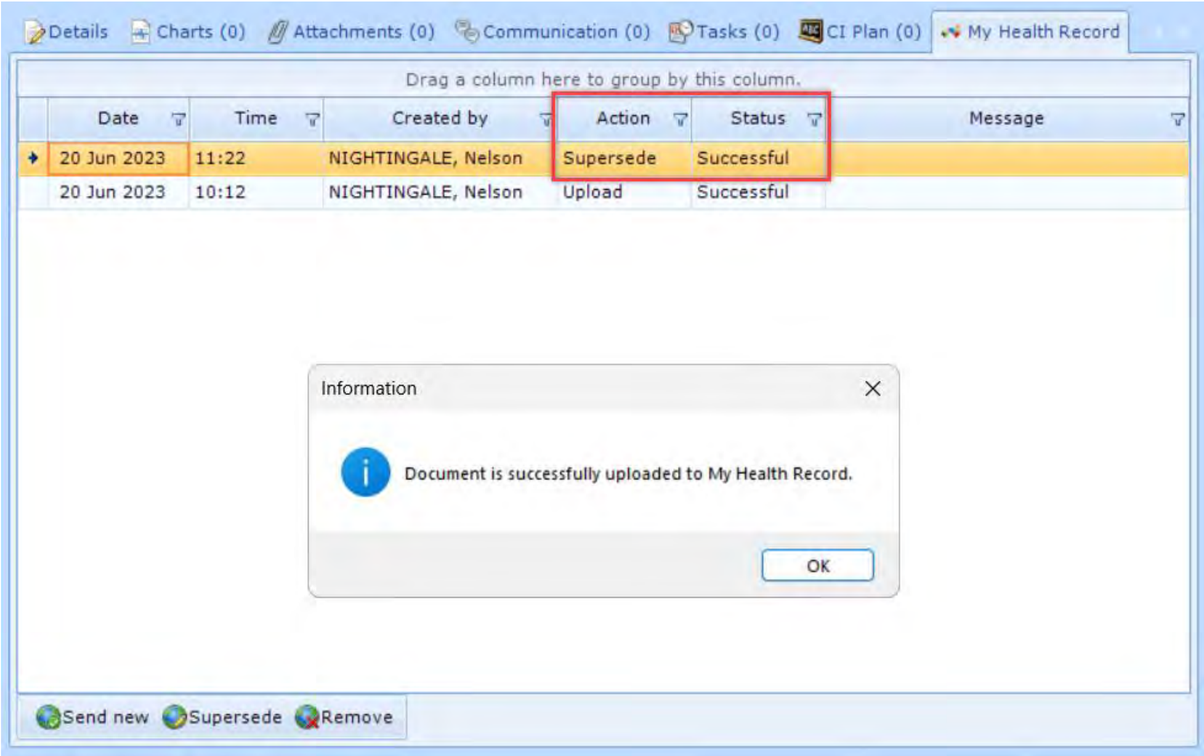
2. Click to open the **My Health Record** tab.
3. Click the **Supersede** button.



4. Click **Yes, upload**.



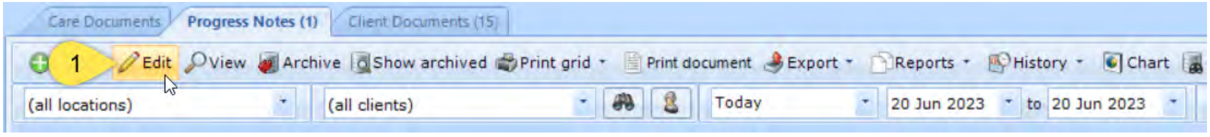
If this was successful, you will receive a confirmation message onscreen and a record of the **Supersede** action will be stored in the tab.



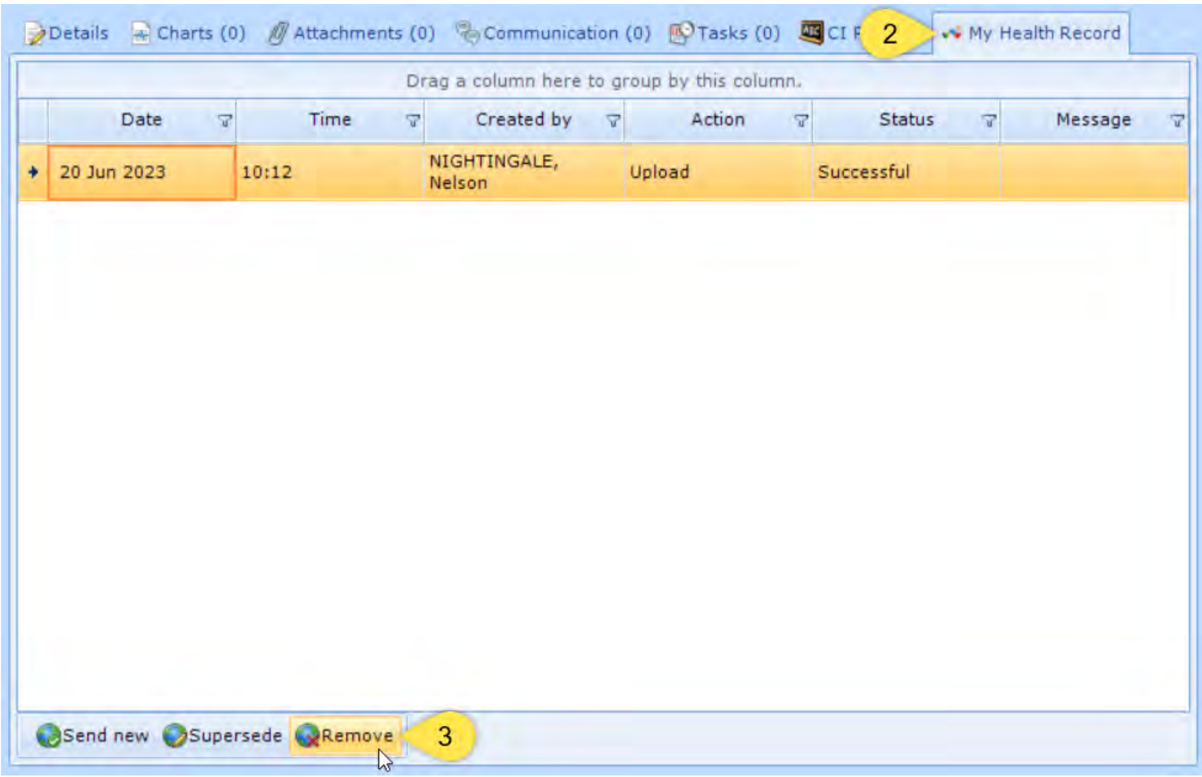
How to remove a document uploaded to MHR

If you have uploaded a document to MHR for the wrong client via **Client Documents** (Advance Care Plan), **Progress Notes** or **Client Incidents**, or you want to remove it for any other reason, this can be done using the following steps.

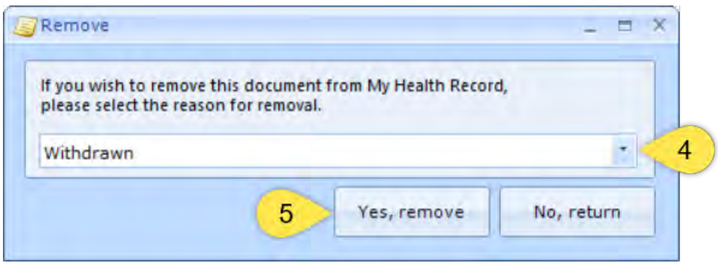
1. Find the relevant record and click the **Edit** button in the toolbar.



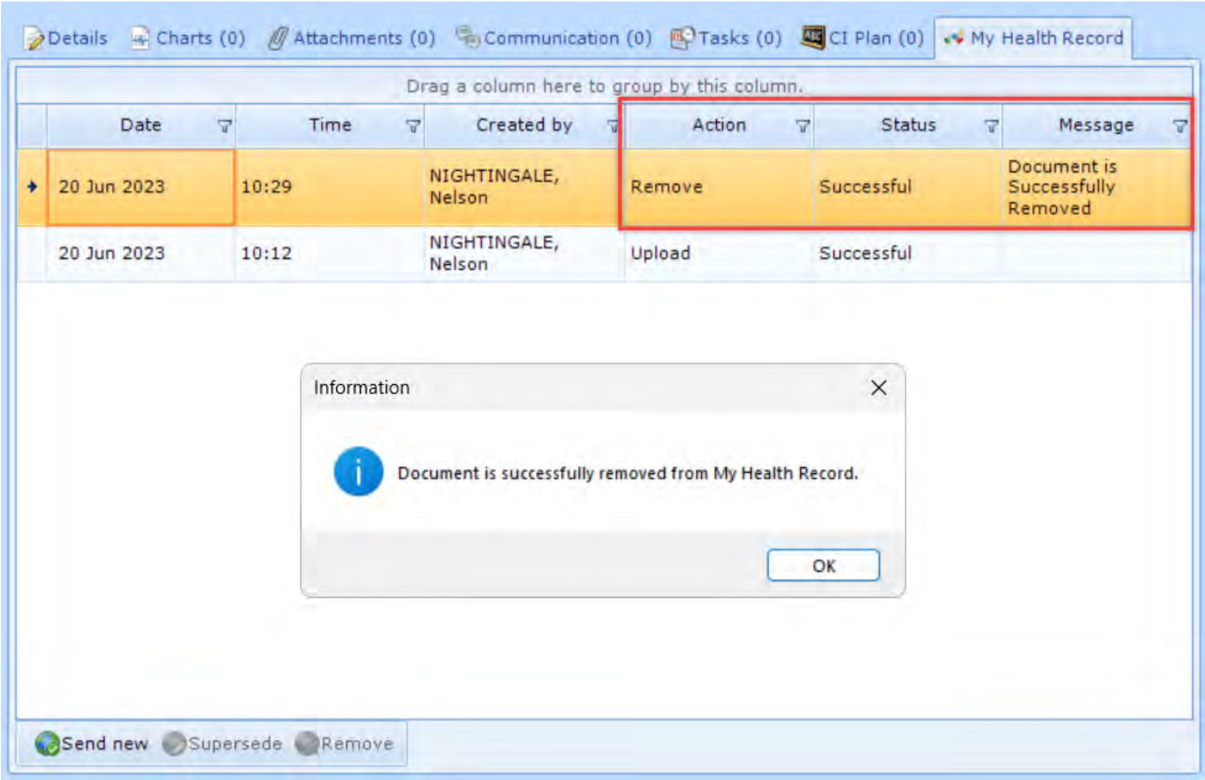
2. Click to open the **My Health Record** tab.
3. Click the **Remove** button.



4. Enter the **Reason for removal** using the drop-down options.
5. Then click **Yes, remove**.



If the removal was successful, you will receive a confirmation message onscreen and a record of the **Remove** action will be stored in the tab.



Troubleshooting / FAQs

Why am I unable to connect to MHR?

There may be a number of reasons why you are having trouble connecting to MHR.

1. Check the NASH PKI certificate has been installed correctly.
2. Check the **HPI-O** and **Cert. SN (Certificate Serial Number)** have been entered correctly in Tools > Locations. Note: You can click the **Check Certificate** button here to confirm this as well.
3. Check your user account has **Security Permissions** to access and use the My Health Record feature.
4. Check the client record you are trying to access has a verified **IHI Number**.
5. Check the Manad Plus API is running (i.e. has a green dot in the bottom-right of the Manad Plus window).
6. Check you have internet access (i.e. can you access Google via a web browser).

Where do I find the PIC number to install the NASH PKI certificate?

When the NASH PKI certificate is available to install, a PIC number will be sent to the mobile phone number of the Registered Officer (RO) or Organisation Maintenance Officer (OMO) that was setup on registration.

You will need this PIC number to install the NASH PKI certificate.

How long is my NASH PKI certificate valid for?

NASH PKI certificates are valid for 2 years, so your RO or OMO should plan to apply and install a new certificate before the expiry date.

> Note: An Organiser task reminder can be set in Manad Plus to do this. For more information, see How to assign a new Organiser task to yourself.

To renew your NASH PKI certificate, your RO or OMO will need to log into HPOS via PRODA and requests a new certificate, selecting the correct software product and version number.

Ensure a mobile phone number is entered when prompted to receive an SMS with the PIC number to install the new NASH PKI certificate within 30 days.

Why can't I upload an Advance Care Plan to MHR?

There may be a number of reasons why you are having trouble uploading an Advance Care Plan to MHR.

1. Check the **Current Advance Care Plan Authorisation** for the client has been updated to give consent.
2. Check the Advance Care Plan you are trying to upload has been saved as a **PDF file**. MHR only accepts PDF files.
3. Check your user account has **Security Permissions** to **Upload** to My Health Record.
4. Check the personnel record linked to user account has a verified **HPI-I**.
5. Check the client record you are trying to upload the document for has a verified **IHI Number**.

Why am I no longer being prompted for an access code?

When a client has set an access code, they will need to give you this code so you can look at their My Health Record information.

However, you will only have to enter the code for a client once and you will not need to do this again unless the client revokes your access.

For more information, see [Manage who can access your record with a record access code].

Why can't I search for the IHI and/or HPI-I with the correct Client/Personnel details entered, Certificates installed and updated on Manad Plus correctly.

The IHI or HPI-I search will be triggered when the NASH PKI certificates are installed and is current, and the API running correctly. Therefore this problem could be API related.

1. Check when the IHI/HPI-I search last worked and check if there were any environmental changes/updates that occurred recently.
2. Make sure the NASH PKI certificate is valid and current.
    a. You can confirm this by clicking **Check Certificate** button from Tools > Locations > Details tab on the relevant facility.
3. As a precautionary step restart the **Manad Plus Service** (Make sure the Manad Plus API and Service process has been ended on task manager Details tab before restarting) as there could be environmental changes that may stop the API to work as expected.