Te Whatu Ora
Health New Zealand

PR**I**MHD

Programme for the Integration of Mental Health Data

PRIMHD Online

Training Manual and User Guide

Date: October 2023

Version: 2.6 Final

Table of Contents

1. Document Overview

1.1   Introduction

This document has been developed by combining the "Training Manual for NGOs Using the Web Data Entry System" and the "NGO Web Data Entry User Manual" to provide a single source document to train and support PRIMHD Online - the NGO Web Data Entry System. This document is maintained by Data Management Services, National Collections, Te Whatu Ora.

This introduction covers:
- The purpose of this training manual and referential user guide, including a content summary.
- Who uses the document and when?
- Assumptions for use.
- Updates and supporting material.
- Getting help.

1.2   Purpose and Content Summary

The purpose of this document is to provide a Training Manual and User Guide for the use of PRIMHD Online. It trains a user how to operate PRIMHD Online and submit their Mental Health and Addiction Service data to the PRIHMD National Collections, Te Whatu Ora. Additionally, it provides referential information for ongoing support of the Record Types and Data Elements and an understanding of their guide for use in PRIMHD Online.

The Training Manual section (section 3) describes how to:
- Get started and Log onto PRIMHD Online
- Search and select PRIMHD Referral and Activity Records
- Create New, Update and/or Delete PRIMHD Referral and Activity Records
- Save and Submit Referral and Activity Records
- Create, update and/or delete ADOM Outcome Collection Occasion Records where applicable
- Create, update and/or delete Supplementary Consumer Records (SCR)
- Manage, Correct and Re-Submit Error Records
- Finish your session, deal with timeouts and Log Off from PRIMHD Online

Section 4 provides supporting and referential information about PRIMHD Online.

1.3   Who Uses this Document and When?

This Training Manual and User Guide is to be used by NGOs who are using PRIMHD Online to report their Mental Health and Addiction services to the PRIMHD National Collection, Te Whatu Ora.

This document is to be used as part of a training programme for NGO users who are using PRIMHD Online and for future reference during the ongoing use of the system.

1.4　Assumptions for Use

When using this User Guide, it is assumed the user:

- Understands that PRIMHD Online only provides data elements and codes for the NGO Referral, Activity Service, ADOM Outcome Collection Record and Supplementary Consumer Record requirements according to the HISO PRIMHD data set and code set standards that must be used in this system. (Note: PRIMHD Online **cannot** be used to map to alternate code sets and systems that may be in use by the NGO provider). The HISO PRIMHD Standards are available to download from: https://www.tewhatuora.govt.nz/our-health-system/data-and-statistics/nz-health-statistics/national-collections-and-surveys/collections/primhd-mental-health-data

- Has had their own relevant browser training and supporting reference material/documentation.

- Has complied with all the Prerequisites for System Use as specified in Section 2.

- Has followed the processes outlined in the NGO Guide to PRIMHD to get connected to the New Zealand Health Network. This document is available to download from: https://www.tewhatuora.govt.nz/assets/Our-health-system/Data-and-statistics/NZ-health-stats/National-collections-and-surveys/Collections/PRIMHD/ngo-guide-to-primhd-171219.pdf

- Has a copy of the PRIMHD File Specification for reference to the self-explanatory error messages that are not repeated in this document. Please refer to the PRIMHD File Specification, available from:

    https://www.tewhatuora.govt.nz/our-health-system/data-and-statistics/nz-health-statistics/data-references/file-specifications/

- Understands this Training Manual and User Guide will be distributed with other HISO supplementary documentation (eg, PRIMHD 10023.2 Data Set and 10023.3 Code Set).

- Has received their User ID and Password for use of PRIMHD Online.

- Understands that Alcohol and Drug Outcome Measure (ADOM) Collection Occasion Records should only be submitted to PRIMHD by users at organisations that have undertaken the appropriate training. Documentation about ADOM is available on the Te Pou website: https://www.tepou.co.nz/initiatives/alcohol-and-drug-outcome-measure/adom-training

- Has a copy of the Guide to PRIMHD – Supplementary Consumer Record requirements, including social outcome indicators (available from the Te Pou website). http://www.tepou.co.nz/resources/guide-to-primhd-supplementary-consumer-record-collection-and-use/706

1.5　Updates and Supporting Documentation

Updates to this Training Manual and User Guide are detailed in Appendix B. Supporting documentation and any updates are available from the Te Whatu Ora PRIMHD website – see https://www.tewhatuora.govt.nz/our-health-system/data-and-statistics/nz-health-statistics/national-collections-and-surveys/collections/primhd-mental-health-data/ngo-and-vendor-reference-information

1.6 Getting Help

Help and system support for PRIMHD Online can be obtained from Te Whatu Ora.

For help with adding a new user or team, forgotten username or password, understanding a system error, a data problem etc, please email primhduserinterface@health.govt.nz. Clicking on the support link at the top of the NGO Data Entry System screen automatically opens an email to this address.

For help with PRIMHD system technical problems, (e.g. system availability or health network connectivity problems), please telephone **0800 505 125** and press **4** for PRIMHD enquiries.

Note: Te Whatu Ora does not provide support help for the following.

Local PC or technical problems (eg. PC start-up, Printing difficulties, Internet service problems, local applications software or operating system software problems). If you have any local support needs please contact your usual PC support agent, Technical programming help desk, or Internet service provider for assistance.

1.7 Getting Reports

Although this system is for data entry, you can get one-off and /or regular reports on your data that is held in PRIMHD. Please email data-enquiries@health.govt.nz to initiate a request.

Users also have the option of accessing PRIMHD reports via the Qlik app. For information on how to get access to Qlik contact: BusinessIntelligence@health.govt.nz

2. System Overview

2.1 Introduction

Chapter 2 of this Training Manual and User Guide provides a System Overview of PRIMHD Online that explains:

- The purpose of PRIMHD Online
- The system's availability
- The pre-requisites for using the system
- The user's responsibilities.

2.2 Purpose

The purpose of PRIMHD Online is to enable small NGOs to report their Mental Health and Addiction referral, service activities, ADOM Outcome Collections and Supplementary Consumer Record information to PRIMHD, the mental health national collection, via a web-based solution.

2.3 System Availability

The targeted system availability is 24 hours per day, 7 days a week.

Support for queries and assistance will be available during normal office hours.

2.4 Pre-Requisites for System Use

In order for an individual to use this system:

1. The **NGO** and all its teams must be registered in **PRIMHD**.

    This requires the **NGO** to work with the Te Whatu Ora **Data Management PRIMHD** support team to record **NGO** and team details, establish connections to the **PRIMHD** system, etc.

    This process normally takes one month. At the end of this process the NGO will be provided with User ID's and passwords for their users to access the system. It can be initiated by the **NGO** seeking assistance – see **Section 1.6 Getting Help**.

2. The **NGO's** site must have PCs that:
    - Have a broadband internet connection
    - Are able to connect to the **PRIMHD** system
    - Run Microsoft's Windows 7 operating system or later
    - Have Internet Explorer Version 9 or later browser.

3. The **User** must:
    - Belong to an authorised team – see point 1 above
    - Have an individual User ID and Password before attempting to Log On.
    - Have completed training with designated trainers.

2.5   User Responsibilities

PRIMHD requires all government funded organisations to meet their reporting responsibilities. The NGO user responsibilities for data entry are to:

1. **Load data by 20th of the following month**
   All data should be provided by the 20th day of the following month (for example, January 2019 data would be required by 20 February 2019). Providers may submit data more frequently as appropriate.

2. **Accurately enter data**
   While the system may detect errors and place them in My Error Records for the user to correct, the user is still required to check the accuracy of their data. (For example: A User could select Code A for Data-field 1 and Code T for Data-field 2. Both Codes are valid but together in the same Activity Record they are not a valid combination. User's need to be mindful of this level of data accuracy requirement in PRIMHD).

3. **Undertake training**
   Read and be familiar with the training section in this document about the use of this system and participate in the training provided.

4. **Be able to use their web browser**
   The user must be competent with their own browser.

5. **Ensure good security and password practices are followed**
   It is important and necessary that passwords must not be shared; it must be kept confidential.
   Users should also not share a common user ID – instead each user must have their own individual user ID for accessing PRIMHD Online. **See section 1.6** for details about requesting new user IDs.

6. **When users cease to use the system**
   The maintenance of User IDs for the NGO Entry System is done by the Data Management National Collections, Te Whatu Ora team. You must contact them to update User ID Records to revoke a user's authorisation when they leave their organisation or cease data entry work. **See section 1.6**.

7. **When teams change**
   The maintenance of the Mental Health & Addiction Team Records is done by the Data Management National Collections, Te Whatu Ora team. You must contact them to update the Teams Records when there is a change of team duties, one team closes and another opens, or when contracted services change. **See section 1.6**.

8. **NGOs with residential teams**
   NGO's with residential beds will need to log on each month and submit each referral for processing, even if there has been no change – i.e. the client is still using the residential bed. This will ensure that an accurate count of residential bed night activity records can be made.

3. Training

3.1 Introduction

Chapter 3 of this Training Manual and User Guide provides details of how to operate the PRIMHD Online system correctly, and successfully submit Mental Health and Addictions services information to PRIMHD.

There is a section with details for each of the record types – Referral, Activity, Collection Occasion (ADOM) and Supplementary Consumer Records.
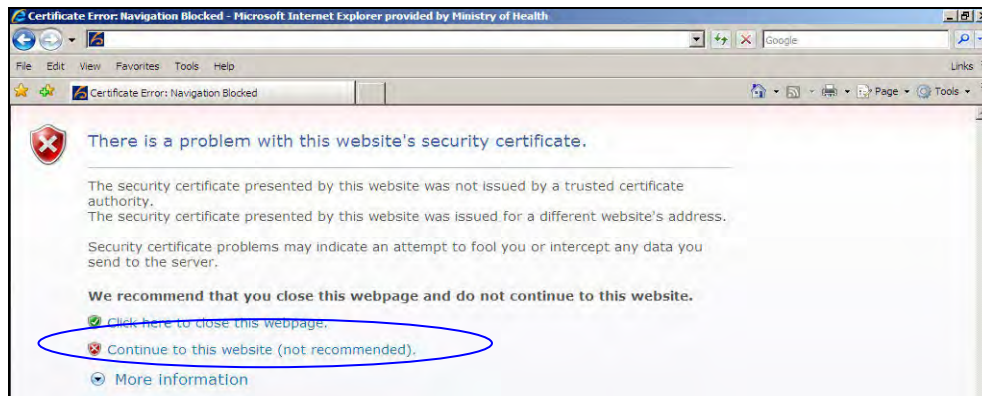
3.2 Accessing the PRIMHD Online Website

To access the PRIMHD Online website easily, it should be listed as a favourite or bookmark which can be accessed from the toolbar.

PRIMHD Online URL: https://primhdonline.moh.health.nz

To set this up, type the URL in the address bar at the top of the browser and press the **Enter** key on the keyboard. This will take you to the PRIMHD Online site (the log in page).

In some browsers, you may be presented with a screen stating: "there is a problem with the website's security certificate". If this happens, select "**Continue to this website**" and you will be taken to the login screen.

If you are using the Chrome browser, you may be presented with an error message stating "**Your connection is not private**". If this happens, click "**Advanced**" and then "**Proceed to primhdonline.moh.health.nz (unsafe)**".

Once you are taken to the login page, a red triangle and error message stating "**Not secure**" might remain in the URL.
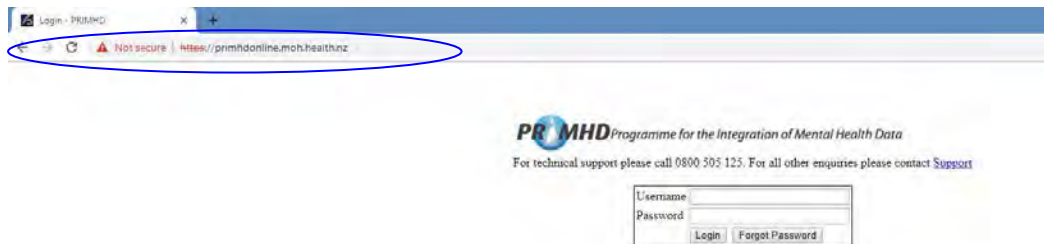
By following the steps above, if you can access the PRIMHD Online login page (shown above) then you can ignore these warnings. You will be using PRIMHD Online safely and securely.

If you are still unable to get through to the PRIMHD Online login page, please email primhduserinterface@health.govt.nz.

NZ Health CA Root Certificate

Some browsers require the trusted root certificate for PRIMHD to be installed locally so the browser knows it's OK to go to the PRIMHD Online site. Without this, users may receive messages such as "connection is insecure" or "connection is not private".

The NZHealth CA Root certificate is available at this link: https://ca.healthlink.net/cacerts/

At this site there are several links. The one you need to install is the top left one called NZHealthCA.cer

Once the certificate is installed (you might need help from your local IT Support) you should no longer receive warnings when you go to the PRIMHD Online site.

Internet Explorer users: Click on **Favourites** at the top of the screen and choose **Add to Favourites**.
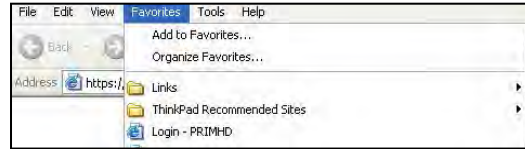
Firefox users: Click on **Bookmarks** at the top of the screen and choose **Bookmark This Page**
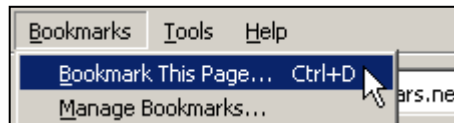
Alternatively (or in addition to the above), set up a shortcut icon on your desktop. To do this, access the URL website as described above. Click on **File** from the menu bar at the top and then select **Send Shortcut to Desktop**
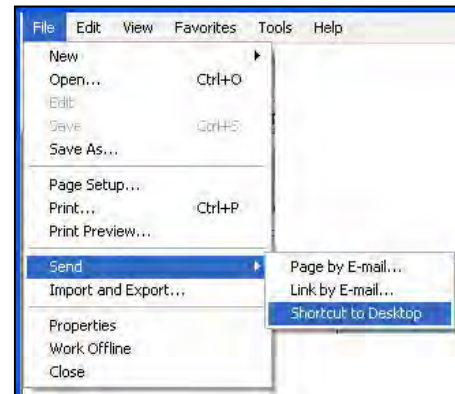
The shortcut icon will then appear on your desktop looking like this:
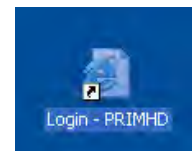
You can then use this shortcut to easily access the site in the future.

3.3 Log In Instructions and Screen Basics

To log in to PRIMHD Online, click in the **Username** field and type your User ID (that will have been supplied to you by the Data Management National Collections, Te Whatu Ora team) and your **Password** (which appears as a series of dots rather than letters). Click on the **Login** button to enter the system.
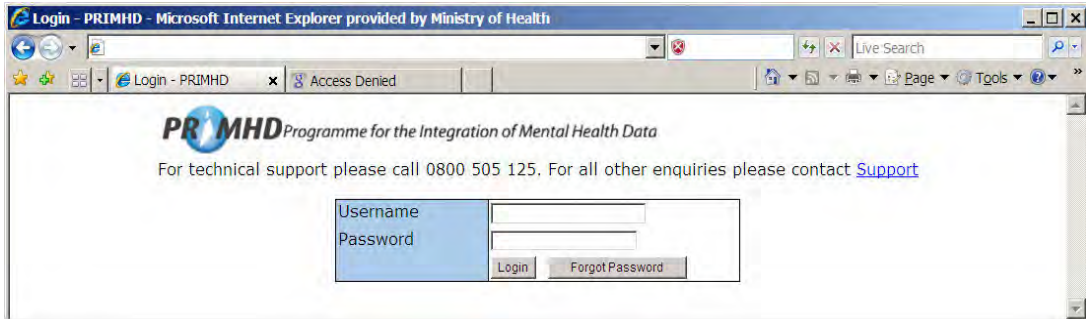
The first time the system is accessed, a screen will appear prompting you to change your password.
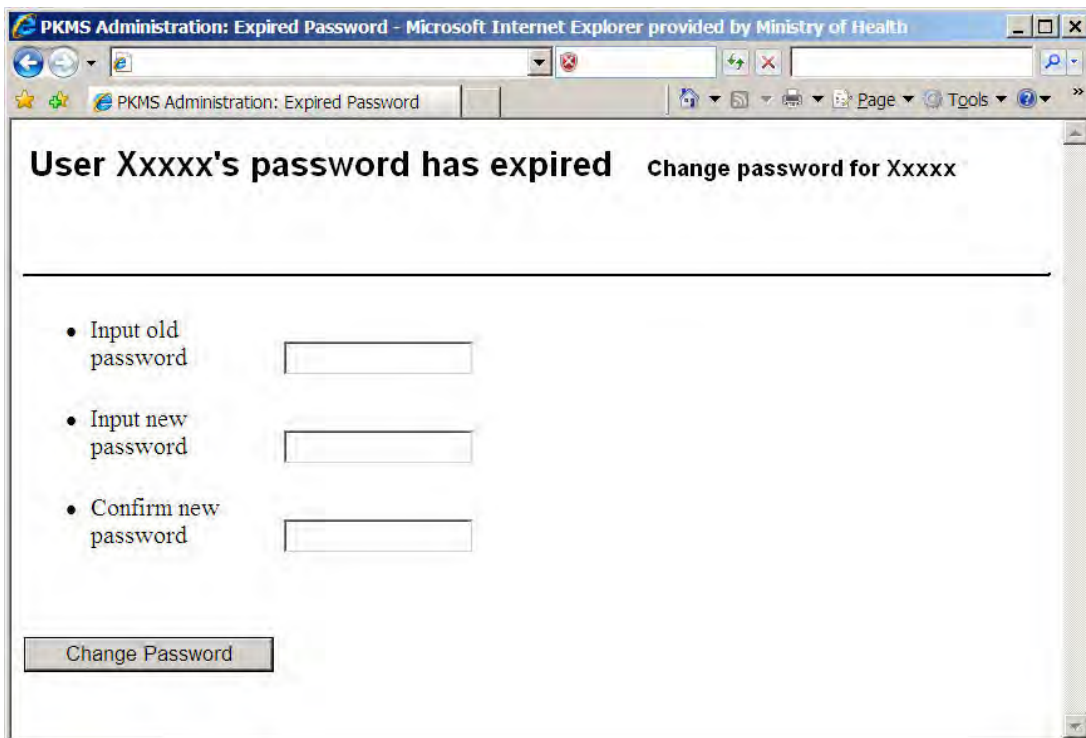
Enter your old password and your new password and then reconfirm your new password. The new password needs to be at least 6 characters long and is case-sensitive. Click the **Change Password** button. You will then be taken to the Search Referral screen.

*NOTE: The **Forgot Password** feature on the login screen is not currently available. See section 1.6 for details of who to contact if you need help with your password.*

Continued on next page...

Further notes about passwords	If a user does not use the system for more than 15 minutes, they will be automatically logged out. If a user is automatically logged out, they will be prompted to log in again when they return to using the system. If a user is automatically logged out, they will have to restart or reload their browser before attempting to reconnect or log in again. It is important and necessary that usernames and passwords must not be shared; it must be kept confidential.
Screen Basics	While using PRIMHD Online you'll notice the following buttons and display features:
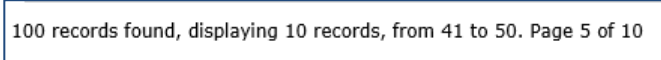
> 1. The page number selection facilities to view the search results are
>
> |◀ ◀◀ ◀ **1** 2 3 4 5 ▶ ▶▶ ▶|
>
>   The paired arrow functions are:
>
>   - |◀ To go to the first page – its opposite symbol goes to the last page
>   - ◀◀ To go 5 pages left – its opposite symbol goes 5 pages right
>   - ◀ To go one page left – its opposite symbol goes one-page right
>
> 2. Also shown is the count of displayed records from a search, the number of pages of results and the page being displayed.
>
>   > 100 records found, displaying 10 records, from 41 to 50. Page 5 of 10
>
> 3. A blue and white circle on the left of a record shows the record has not yet been submitted or it has been submitted but has errors.
>
> | | Referral ID |
> |---|---|
> | | NGOWEBREF000159043 |
> | ○ | NGOWEBREF000158176 |
> | ○ | NGOWEBREF000158172 |
> | ○ | NGOWEBREF000157768 |
> | | NGOWEBREF000155001 |
>
> 4. Search results can be sorted by any column by clicking on the desired column heading.
>
> 5. The referral colour banding is:
>   - Dark Blue - the last referral looked at
>   - Light Blue - the referral result the cursor is positioned on

3.4   Referral Records

Once in the system, your starting point will be the Referrals section (notice the Referrals tab at the top of the screen is shaded blue). This form will appear, ready for you to input new data or search for existing data. You can come back to this screen at any time by clicking on the Referrals tab.
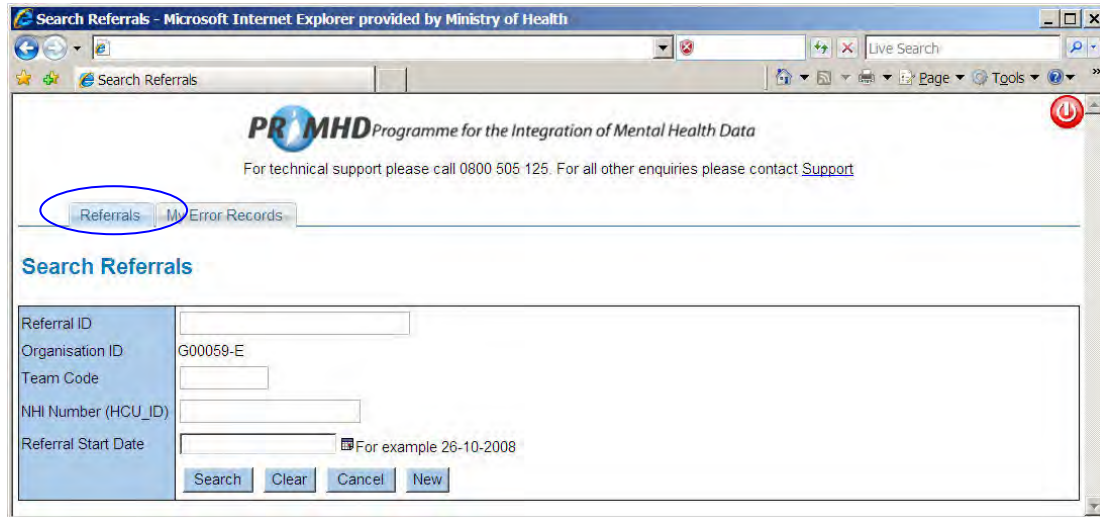
This screen is the starting point for searching for an existing referral (see section 3.5) and for adding a new referral (see section 3.6).

For the **Referral Start Date** you can enter the day, month and year directly **or** click on the

 icon. A calendar showing the current month and year will appear.
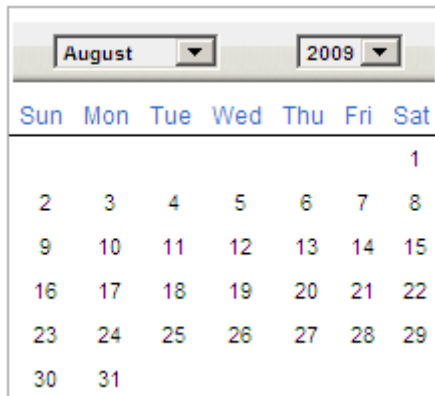
Note that there are several places on different screens where this calendar can be accessed from the icon.

You can use the drop down arrows to change the month or year. To select a date click on it, and it will then insert the date into the Referral Start Date field and close the calendar.

3.5 Search Existing Referral Records

To search for any referrals within your organisation, click on the Search button:

The Referral Search Result screen will display with all Referrals for your organisation listed:

100 records found, displaying 10 records, from 11 to 20. Page 2 of 10

Notes:

If an organisation has more than 100 referrals, only 100 will be displayed in a search at organisation level. The 100 displayed will be those most recently edited or added.

The blue/white round icon on the left of the Referral ID means that this particular referral has not yet been submitted for processing **or** has errors that need to be corrected.

You can click on the column headings to display the activity records in a different order. The small yellow arrow next to Referral ID in the screenshot above indicates the records are ordered by Referral ID.

Continued on next page...

From the Search Referral screen you can modify existing referrals by following the instructions in Section 3.7, add an activity to a referral by following the instructions in Section 3.10, add an ADOM Outcome Collection Occasion Record to a referral by following the instructions in Section 3.13, add a Supplementary Consumer Record to a referral by following the instructions in Section 3.16, or add a new referral record by following the instructions in Section 3.6.

The **Clear** button will clear any data that you have entered in any of the fields on the Search Referral form.

The **Cancel** button will remove your search results display.

If you want to search by any of the fields on the form in addition to Organisation ID, enter the appropriate details before you click **Search** :

If no referrals are found in the search the following screen will be displayed:

3.6 Adding New Referral Records

Before adding a new referral, you should first search by NHI (see section 3.5) to check the referral doesn't already exist.

To add a new Referral, click on the **New** button on the Search Referrals screen:

Complete the required data fields on the Add New Referral screen. Any field that has ** is mandatory. Some fields have drop down lists for you to make your selection from. You must enter a start time in the *24-hour clock format* including minutes. Note that the dropdown lists for Referral From, Referral To and Referral End Code will become available once you have entered the other details of the referral.

Enter all appropriate details and click the **Save** button.

The PRIMHD Code Set Standard document provides a guideline on what option should be selected from the dropdown depending on a given scenario.
https://www.tewhatuora.govt.nz/publications/hiso-primhd-code-set-standard/

Adding New Referral Records, Continued

If you miss out any mandatory fields (those marked with red stars **) or use incorrect formatting, error messages will show up with a red explanatory note eg:

The **Clear** button enables you to clear all the data that you have just entered in the form.

The **Cancel** button takes you back to the previous screen.

When you have entered your referral details and you wish to add activities, click the **Save** button.

The Add New Activity form will appear below the Add a New Referral form (see Section 3.10 for steps on how to complete this form).

If you only wish to submit the referral details, then click the **Submit for Processing** button. If the referral is successfully submitted, you will get a successful message highlighted green.

If the referral is not successfully submitted, you will get an error message highlighted red:

See sections 3.19 and 3.20 for details of how to deal with error records.

3.7   Editing Existing Referral Records

After searching (see section 3.5), click on an individual Referral ID to select the record:

	Referral ID	Team Code	NHI Number (HCU ID)	Start Date	End Date	Last Modified Date
○	DMSWEBREF000002793	7315	s 9(2)(a)	17-08-2009 15.41		05-11-2009
○	DMSWEBREF000002832	7315		01-01-2007 11:15		16-11-2009
	DMSWEBREF000002853	7315		10-10-2009 10 10		01-12-2009
○	DMSWEBREF000002854	7315		10-10-2006 15.41		01-12-2009
	NGOWEBREF000002600	7315		10-10-2006 15.15	18-02-2009 20:45	27-07-2009
	NGOWEBREF000002660	7315		20-01-2006 07 10		07-08-2009

The View Referral Screen will open:

View Referral

Referral ID	DMSWEBREF000165321
Organisation ID	G00059-E
Team Code	7374
NHI Number (HCU ID)	s 9(2)(a)
Sex	
Date of Birth	
Referral Start Date	05-01-2021 09:00
Referral End Date	
Referral From	NA - Needs assessment and co-ordination service
Referral To	
Referral End Code	
Last Modified Date	30-06-2021 08:35

Edit Cancel

Activity	Classification	Collection Occasion	Supplementary Consumer Records

Activity ID	Activity Type	Activity Setting	Family/Whānau Involvement	Health Care Worker CPN	Start Date Time	End Date Time	To Be Deleted
DMSWEBACT002483102	T10	OS	2		05-01-2021 09:30	05-01-2021 10:00	

1 records found, displaying 1 records, from 1 to 1. Page 1 of 1

Click the **Edit** button to take you to the Edit Referral screen to edit the data.

Continued on next page...

Make any required changes to the referral details.

This is also where activity, Collection Occasion Records and Supplementary Consumer Record can be added or edited. See sections 3.10 to 3.17 for details.

When you are ready to submit the edited referral details, click the Submit for Processing button, otherwise, just click the Save button if you wish to continue adding activities.

If the referral is successfully submitted, you will get a successful message highlighted green:

If the referral is not successfully submitted you will get an error message highlighted red:

See sections 3.19 and 3.20 for details of how to deal with error records.

3.8 Deleting Referral Records

WARNING: When you delete a referral record, it **CANNOT** be restored. **Deletion is final.**

After searching (see section 3.5), click on an individual Referral ID to select the record:

The View Referral Screen will open:

Click the **Edit** button to take you to the Edit Referral screen to edit the data.

Click on the **Delete Referral** button. You will be presented with the following warning:

Continued on next page...

If you press **Yes** to the warning message you should be presented with the following:

WARNING: When you delete a referral record, it **CANNOT** be restored. **Deletion is final**.

3.9   Closing a Referral

Once a service user's care with a service (team) is complete, and they are no longer receiving services from the team, the referral will need to be closed.

First, search for the appropriate referral in the Referral screen (see section 3.5) and click on the appropriate individual Referral ID to select the record.

Referral ID	Team Code	NHI Number (HCU ID)	Start Date	End Date	Last Modified Date
DMSWEBREF000002793	7315	s 9(2)(a)	17-08-2009 15:41		05-11-2009
DMSWEBREF000002832	7315		01-01-2007 11:15		16-11-2009
DMSWEBREF000002853	7315		10-10-2009 10:10		01-12-2009
DMSWEBREF000002854	7315		10-10-2008 15:41		01-12-2009
NGOWEBREF000002600	7315		10-10-2008 15:15	18-02-2009 20:45	27-07-2009
NGOWEBREF000002660	7315		20-01-2008 07:10		07-08-2009

The View Referral Screen will open:

Click the **Edit** button to take you to the Edit Referral screen to edit the data.

There are **three** fields you need to complete to provide all the required referral end details: Referral End Date (and time), Referral To and Referral End Code.

The PRIMHD Code Set Standard document provides a guideline on the correct Referral To and Referral End Codes that should be selected depending on a given scenario.
https://www.health.govt.nz/publication/hiso-1002332017-primhd-code-set-standard

When you are ready to submit the closed referral, click the **Submit for Processing** button.

If the referral is successfully submitted you will get a successful message highlighted green:

If the referral is not successfully submitted you will get an error message highlighted in red:

See sections 3.19 and 3.20 for details of how to deal with error records.

3.10 Activity Records

To view Activity Records, first search for referrals (see section 3.5) and then click on an individual Referral ID to select and view the record.

If a referral has any existing activity record(s) they will be listed below the referral details on the Activity tab as shown below on the View Referral screen:

Note:

If a referral has more than 100 activity records attached, only 100 will be displayed underneath the referral details on the View Referral screen. The 100 displayed will be those most recently added or edited. If you proceed to the Edit Referral screen you will see the full list of activity records listed.

You can click on the column headings to display the activity records in a different order.

3.11   Adding New Activity Records

You can add a new activity record(s) immediately after you have entered and saved new referral details (section 3.6). After you press the **Save** button you will be presented with the Add New Activity form on the Activity tab where you can enter activity details.

Alternatively, you can add a new activity record(s) after you have searched and found an existing referral (section 3.7).

On the View Referral screen click the **Edit** button and scroll down to the Add New Activity form below on the Activity tab:

Enter all the details in the Add New Activity form and then click the **Save** button.

There is now a new dropdown menu in the Activity form for Family/ Whānau Involvement. You may select option 1 – Yes Client with family/ whānau, or 2 – No Client only.
To indicate involvement as yes, whānau should have been involved for all or part of an activity.
For further details see the Guide to PRIMHD Activity Collection and Use document available here: https://www.health.govt.nz/publication/guide-primhd-activity-collection-and-use

Repeat this if there are more activity records to be entered. Once an activity record(s) has been saved it will be added to the list at the bottom of the screen and will have the blue circle symbol next to it to indicate it has been saved but not yet submitted. After saving, activity records remain saved until you are ready to submit.

If there are any errors with the completion of your activity data, error messages will show up with a red explanatory note:

These on-screen errors will need to be corrected before the activity record can be saved.

When you are ready to submit the data, click on the **Submit for Processing** button higher up in the referral section:

If the referral is successfully submitted, you will get a successful message highlighted green.

Referral Accepted by PRIMHD

✅ Referral NGOWEBREF000002660 has been successfully submitted and accepted by the PRIMHD system.

Referral Details

Referral ID	NGOWEBREF000002660
Organisation ID	G00059-E

If the referral is not successfully submitted, you will get an error message highlighted red:

Referral Rejected by PRIMHD

⛔ Referral NGOWEBREF000000331 has been submitted and rejected by the PRIMHD system with the following errors.

Edit Referral

See sections 3.19 and 3.20 for details of how to deal with error records.

Note:
Users may experience some difficulty submitting referrals for processing when they have about 1000 activity records attached, due to a timeout.

Referrals	Team	Legal	My Error Records	Reconciliation	Recon

No Response from PRIMHD

⛔ No response was received from the system. Please contact Support.

Edit Referral Discharge Pending

It may be necessary to close the referral and start a new one with activity from that point on to avoid this. Please contact primhduserinterface@health.govt.nz if you have queries about this.

3.12 Editing and Deleting Activity Records

To edit an Activity Record, first search for referrals (see section 3.5) and then click on an individual Referral ID to select the record:

On the View Referral Screen click the **Edit** button and scroll down to the list of Activity Records below (on the Activity tab):

Click on the appropriate Activity ID and the Edit Activity form will open.

Make any appropriate changes and then click the **Save** button. This will save the changes until you are ready to submit. When you are ready, click the **Submit for Processing** button higher up in the referral section.

Editing and Deleting Activity Records, Continued

The **Cancel** button will clear this form of any data you have just entered and take you back to the previous screen.

You can delete an activity record by clicking on the **Delete Activity** button on the Edit Activity form:

The following warning screen will appear:

Editing and Deleting Activity Records, Continued

Click on **Yes** and the activity screen will appear with the word **Yes** in the **To Be Deleted** column next to the Activity Record that was deleted.

| | Save | Clear | Cancel |

Activities -- Select one for editing

	Activity ID	Activity Type	Family/Whānau Involvement	Activity Setting	Health Care Worker CPN	Start Date Time	End Date Time	To Be Deleted
○	DMSWEBACT002483022	T52	1	OS	s 9(2)(a)	05-01-2021 09:00	05-01-2021 09:30	Yes
○	DMSWEBACT002483001	T52	1	DM		01-05-2021 09:00	01-05-2021 12:00	

2 records found, displaying 2 records, from 1 to 2. Page 1 of 1

When you are ready, click the **Submit for Processing** button higher up in the referral section. If the record is successfully submitted the Activity Record will be deleted.

WARNING: When you delete an Activity Record, it **CANNOT** be restored. **Deletion is final.**

3.13 Collection Occasion Records

Alcohol and Drug Outcome Measure (ADOM) Collection Occasion Records should only be submitted to PRIMHD by users at organisations that have undertaken the appropriate training. Documentation about ADOM is available on the Te Pou website: https://www.tepou.co.nz/initiatives/alcohol-and-drug-outcome-measure/adom-training

To view Collection Occasion Records, first search for referrals (see section 3.5) and then click on an individual Referral ID to select and view the record:

	Referral ID	Team Code	NHI Number (HCU ID)	Start Date	End Date	Last Modified Date
○	DMSWEBREF000002793	7315	s 9(2)(a)	17-08-2009 15.41		05-11-2009
○	DMSWEBREF000002832	7315		01-01-2007 11.15		16-11-2009
	DMSWEBREF000002853	7315		10-10-2009 10.10		01-12-2009
○	DMSWEBREF000002854	7315		10-10-2008 15.41		01-12-2009
	NGOWEBREF000002600	7315		10-10-2008 15.15	18-02-2009 20.45	27-07-2009
	NGOWEBREF000002660	7315		20-01-2008 07.10		07-08-2009

If a referral has any existing Collection Occasion Records they will be listed below the referral details on the Collection Occasion tab as shown below on the View Referral Screen:

View Referral

Referral ID	NGOWEBREF000002660
Organisation ID	G00059-E
Team Code	7315
NHI Number (HCU ID)	s 9(2)(a)
Sex	
Date of Birth	
Referral Start Date	20-01-2008 07.10
Referral End Date	
Referral From	NA - Needs assessment and co-ordination service
Referral To	
Referral End Code	
Last Modified Date	27-06-2016 11.10

Collection Occasion

Collection Occasion ID	Reason For Collection	Collection Occasion Date	Healthcare Worker CPN	Outcome Episode Id	Outcome Tool Type Version	To Be Deleted
NGOWEBCO000002541	RC15	20-05-2014 14.00			M1	
NGOWEBCO000002540	RC13	15-05-2014 10.00			M1	

2 records found, displaying 2 records, from 1 to 2. Page 1 of 1

You can click on the column headings to display the collection occasion records in a different order.

Continued on next page...

You can view the details on a Collection Occasion Record by selecting it from the list of Collection Occasion Records displayed on the View Referral screen. The full Collection Occasion and Outcome Item details will be displayed at the bottom of the screen.

To hide the Collection Occasion Record details, press the **Cancel** button on the Collection Occasion tab.

You can add a new Collection Occasion Record(s) immediately after you have entered and saved new referral details (section 3.6). After you press the **Save** button you be presented with the Add Collection Occasion form on the Collection Occasion tab where you can enter the details.

Alternatively, you can add a new Collection Occasion Record(s) after you have searched and found an existing referral (section 3.7).

On the View Referral screen click the **Edit** button and scroll down to the Add Collection Occasion form below on the Collection Occasion tab:

Continued on next page...

Enter all the details in the Add Collection Occasion form

Note

The Reason for Collection for any ADOM Collection Occasion must be one of RC13 - RC21. The Focus of Care for any ADOM Collection Occasion must one of FC10 - FC12.

Scroll to the bottom of the screen and enter the Outcome Item Values for each of the Outcome Item Codes.

Note

You will need to scroll down to view and enter Outcome Item Values for all 23 ADOM Outcome Item Codes.

Once all the details have been entered click the **Save** button.

Adding New Collection Occasion Records, Continued

Repeat this if there are more Collection Occasion Records to be entered. Once a Collection Occasion Record(s) has been saved it will be added to the list at the bottom of the screen and will have the blue circle symbol next to it to indicate it has been saved but not yet submitted. After saving, Collection Occasion Records remain saved until you are ready to submit.

	Collection Occasion ID	Reason For Collection	Collection Occasion Date	Healthcare Worker CPN	Outcome Episode Id	Outcome Tool Type Version	To Be Deleted
○	NGOWEBCO000002560	RC15	30-05-2014 14:00			M1	
	NGOWEBCO000002541	RC15	20-05-2014 14:00			M1	
	NGOWEBCO000002540	RC13	15-05-2014 10:00			M1	

3 records found, displaying 3 records, from 1 to 3. Page 1 of 1

If there are any errors with the completion of your collection occasion data, error messages will show up with a red explanatory note:

Activity	**Collection Occasion**	Supplementary Consumer Records

Add Collection Occasion

			Outcome Episode Id	
Collection Occasion Date	30-05-2016	14:00 **	Protocol Version	0140 - Version 1.4
Reason For Collection	RC17 - Treatment review - 12 weeks **		Focus of Care	FC11 - Active treatment
Healthcare Worker CPN				
Outcome Tool Type Version	M1 - ADOM **		Collection Status	** Field Collection Status is required
Mode of Administration	MA03 - Self-report completed by tangata whaiora/cor **			
Completion Date	30-05-2016 14:00 **			

** indicates mandatory fields

[Save] [Clear] [Cancel]

These on-screen errors will need to be corrected before the record can be saved.

When you are ready to submit the data, click on the **Submit for Processing** button higher up in the referral section:

PR MHD Programme for the Integration of Mental Health Data

For technical support please call 0800 505 125. For all other enquiries please contact Support

| Referrals | My Error Records |

Edit Referral

Referral ID	NGOWEBREF000002560
Organisation ID	G00059-E
Team Code	7315 **
NHI Number (HCU ID)	s 9(2)(a) **
Sex	**
Date of Birth	**
Referral Start Date	20-01-2008 07:10 **
Referral End Date	
Referral From	NA - Needs assessment and co-ordination service **
Referral To	
Referral End Code	

** indicates mandatory fields

[Save] [Cancel] [Submit for Processing] [Create Referral]

| Activity | **Collection Occasion** | Supplementary Consumer Records |

Add Collection Occasion

Adding New Collection Occasion Records, Continued

If referral is successfully submitted, you will get a successful message highlighted green.

Referral Accepted by PRIMHD

✓ Referral NGOWEBREF000002660 has been successfully submitted and accepted by the PRIMHD system.

Referral Details

Referral ID	NGOWEBREF000002660
Organisation ID	G00059-E

If the referral is not successfully submitted you will get an error message highlighted red:

Referral Rejected by PRIMHD

⊖ Referral NGOWEBREF000000331 has been submitted and rejected by the PRIMHD system with the following errors.

[Edit Referral]

See sections 3.19 and 3.20 for details of how to deal with error records.

3.15   Editing and Deleting Collection Occasion Records

To edit a Collection Occasion Record, first search for referrals (see section 3.5) and then click on an individual Referral ID to select the record:

On the View Referral Screen click the **Edit** button and scroll down to the list of Collection Occasion Records below (on the Collection Occasion tab):

Click on the appropriate Collection Occasion ID and the Edit Collection Occasion form will open.

Make any appropriate changes and then click the **Save** button. This will save the changes until you are ready to submit. When you are ready, click the **Submit for Processing** button higher up in the referral section.

The **Cancel** button will clear this form of any data you have just entered and take you back to the previous screen.

You can delete a Collection Occasion Record by clicking on the **Delete Collection Occasion** button on the Edit Collection Occasion form:

The following warning screen will appear:

Editing and Deleting Collection Occasion Records, Continued

Click on **Yes** and the Collection Occasion screen will appear with the word **Yes** in the **To Be Deleted** column next to the Collection Occasion Record that was deleted.

When you are ready, click the **Submit for Processing** button higher up in the referral section. If the record is successfully submitted the collection occasion record will be deleted.

WARNING: When you delete a Collection Occasion Record, it **CANNOT** be restored. **Deletion is final.**

3.16   Supplementary Consumer Records (SCR)

The inclusion of social outcome measures in PRIMHD is intended to complement existing measures of outcome by providing information on the social contexts relevant to a service user's care.

The collection of Supplementary Consumer Record (SCR) in PRIMHD was mandatory for all Mental Health and Addiction service (MH&A) referrals from 1 July 2016.

As part of NCAMP21, there is a change in the requirements for when SCR data are expected to be reported to PRIMHD from 1 July 2021.

The reporting guidelines have been updated to state that there is no expectation that a SCR is to be reported until there have been 3 face to face activities. This is in line with the PP7 reporting for wellness plans.

In addition, we are now allowing for the fact that some organisations don't need to report them at all depending on the type of service they provide.

Documentation about SCR reporting requirements is available on the Te Pou website. http://www.tepou.co.nz/resources/guide-to-primhd-supplementary-consumer-record-collection-and-use/706

To view Supplementary Consumer Records, first search for referrals (see section 3.5) and then click on an individual Referral ID to select and view the record:

Referral Search Result

Referral ID	Team Code	NHI Number (HCU ID)	Start Date	End Date	Last Modified Date
DMSWEBREF000002793	7315	s 9(2)(a)	17-06-2009 15:41		05-11-2009
DMSWEBREF000002832	7315		01-01-2007 11:15		16-11-2009
DMSWEBREF000002853	7315		10-10-2009 10:10		01-12-2009
DMSWEBREF000002854	7315		10-10-2008 15:41		01-12-2009
NGOWEBREF000002600	7315		10-10-2008 15:15	18-02-2009 20:45	27-07-2009
NGOWEBREF000002660	7315		20-01-2008 07:10		07-08-2009

Continued on next page...

Supplementary Consumer Records (SCR), Continued

If a referral has any existing Supplementary Consumer Records, they will be listed below the referral details on the Supplementary Consumer Records tab as shown below on the View Referral Screen:

You can click on the column headings to display the Supplementary Consumer Records in a different order.

You can view the details on a Supplementary Consumer Record by selecting it from the list of Supplementary Consumer Records displayed on the View Referral screen.

To hide the Supplementary Consumer Record details, press the Cancel button on the Supplementary Consumer Record tab.

3.17 Adding New Supplementary Consumer Records

You can add a new Supplementary Consumer Record(s) immediately after you have entered and saved new referral details (section 3.6). After you press the **Save** button you will be presented with the Add Supplementary Consumer Record form on the Supplementary Consumer Records tab where you can enter the details.

Alternatively, you can add a new Supplementary Consumer Record(s) after you have searched and found an existing referral (section 3.7).

On the View Referral screen click the **Edit** button and scroll down to the Add Supplementary Consumer Record form below on the Supplementary Consumer Records tab:

Continued on next page...

Adding New Supplementary Consumer Records, Continued

Enter all the details in the Add Supplementary Consumer Record form

Once all the details have been entered click the **Save** button.

Repeat this if there are more Supplementary Consumer Records to be entered. Once a Supplementary Consumer Record(s) has been saved it will be added to the list at the bottom of the screen and will have the blue circle symbol next to it to indicate it has been saved but not yet submitted. After saving, Supplementary Consumer Records remain saved until you are ready to submit.

If there are any errors with the completion of your Supplementary Consumer Record data, error messages will show up with a red explanatory note:

These on-screen errors will need to be corrected before the record can be saved.

Continued on next page...

Adding New Supplementary Consumer Records, Continued

When you are ready to submit the data, click on the **Submit for Processing** button higher up in the referral section:

If the referral is successfully submitted, you will get a successful message highlighted green:

If the referral is not successfully submitted, you will get an error message highlighted red:

See sections 3.19 and 3.20 for details of how to deal with error records.

3.18   Editing and Deleting Supplementary Consumer Records

To edit a Supplementary Consumer Record, first search for referrals (see section 3.5) and then click on an individual Referral ID to select the record:

On the View Referral Screen click the **Edit** button and scroll down to the list of Supplementary Consumer Records below (on the Supplementary Consumer Records tab):

Click on the appropriate Supplementary Consumer Record ID and the Edit Supplementary Consumer Record form will open.

Make any appropriate changes and then click the **Save** button. This will save the changes until you are ready to submit. When you are ready, click the **Submit for Processing** button higher up in the referral section.

The **Cancel** button will clear this form of any data you have just entered and take you back to the previous screen.

You can delete a Supplementary Consumer Record by clicking on the **Delete Supplementary Consumer Record** button on the Edit Supplementary Consumer Record form:

The following warning screen will appear:

Continued on next page...

Editing and Deleting Supplementary Consumer Records, Continued

Click on **Yes** and the Supplementary Consumer Record screen will appear with the word **Yes** in the **To Be Deleted** column next to the Supplementary Consumer Record that was deleted.

When you are ready, click the **Submit for Processing** button higher up in the referral section. If the record is successfully submitted the Supplementary Consumer Record will be deleted.

WARNING: When you delete a Supplementary Consumer Record, it **CANNOT** be restored. **Deletion is final.**

3.19   My Error Records

Where submitted data has been rejected, an error message will be displayed along with details of the error(s). You have the option of fixing the error straight away by clicking on the **Edit Referral** button and amending the data before re-submitting the record.
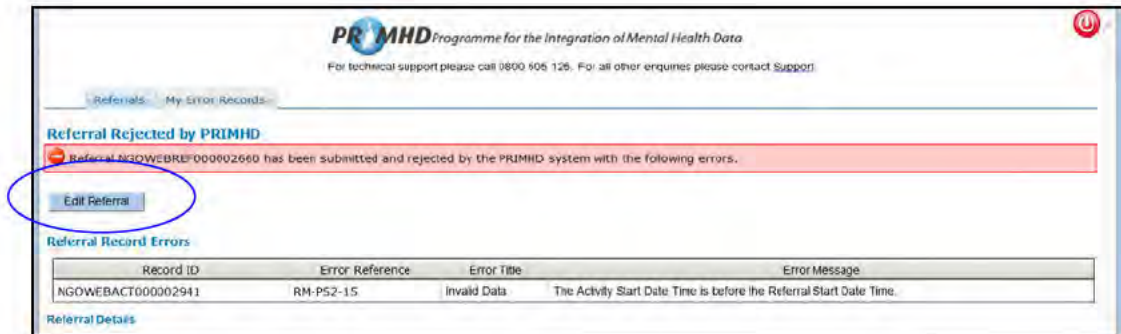
Where submitted data has been rejected, the information will appear on the My Error Records page. This means you can fix the error at a later stage if necessary.

To view a list of errors that need to be corrected, click on the **My Error Records** tab at the top of the screen:
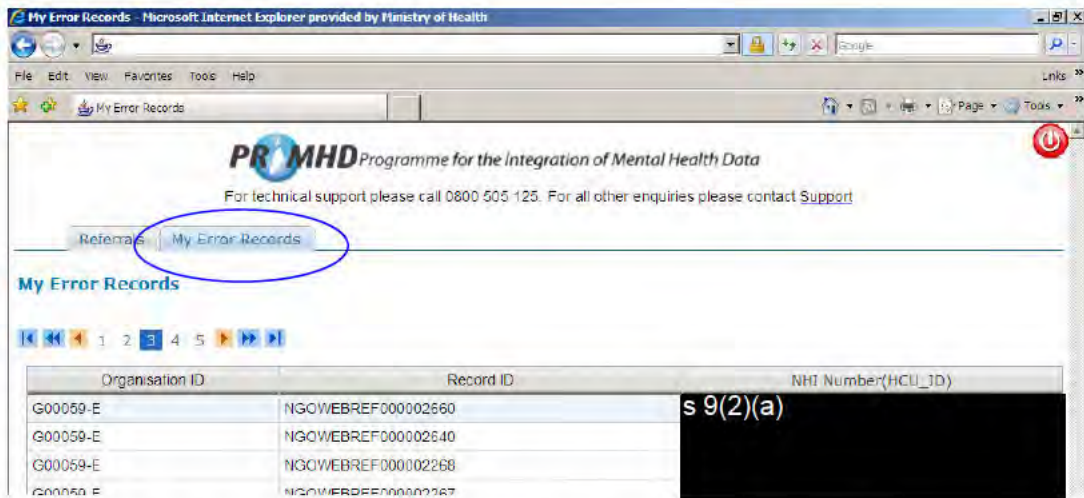
Any records that have resulted in an error will be displayed on this screen.

To see details of the errors, click on any of the Record IDs in the list to take you to a screen showing the error(s) for that referral.

Then click on the **Edit** button to correct or update erroneous data. See section 3.7 for details on editing referrals.

NOTE: When you click the **Edit Referral** *or* **Edit** *button you will be taken back to the Edit Referral screen which will* **not** *display the reported errors for the referral. Because of this, users may wish to copy the errors before clicking this button.*

The following section (3.19) gives details of some common errors that may be received by users, and some advice on how to correct them.

3.20   Common Error Messages when Submitting Records

The following table lists some of the common error messages that may be presented to a user when submitting data in PRIMHD Online and gives some hints for correcting them.

Errors relating to NHI Details

Error	Description
RM-P22-06	The Event HCU ID supplied in the HC record is not valid in the NHI Database.
Hints for correcting	The Event HCU ID is the client's NHI number. The HC record is the Healthcare User record. This error means that the NHI number entered on the referral is not a valid NHI Number. Check that you have entered the NHI number correctly and that no letters or digits have been transposed. Check back to your files to make sure you are using the correct NHI number for the client. If you still get the error you can send an email to primhduserinterface@health.govt.nz for help with this.

Error	Description
RM-P22-08	The Date of Birth in the HC Record does not match the Date of Birth in the NHI Database for the Event HCU ID.
Hints for correcting	The Event HCU ID is the client's NHI number. The HC Record is the Healthcare User Record. Check and re-enter the correct Date of Birth for the client. Check for transposed digits. If you still get the error, and you think the Date of Birth has been recorded incorrectly on the NHI, you can send an email to primhduserinterface@health.govt.nz for help with this.

Error	Description
RM-P22-09	The Sex in the HC Record does not match the Sex in the NHI Database for the Event HCU ID.
Hints for correcting	The Event HCU ID is the client's NHI number. The HC record is the Healthcare User Record. Check and re-enter the correct Sex for the client.

Errors relating to Activity Dates

Error	Description
RM-P52-20	The Activity Start Date/Time is before 1 July 2008.
Hints for correcting	Only activity on or after 1 July 2008 should be recorded in PRIMHD. If the activity is *before* 1 July 2008 it does not need to be reported to PRIMHD.

Error	Description
RM-P52-22	The Activity Start Date/Time is a future date/time.
Hints for correcting	Check the Activity Start Date you have entered – it cannot be greater than today's date. Adjust the Activity Start Date to be the correct date that the activity started.

Error	Description
RM-P52-24	The Activity End Date/Time is a future date/time.
Hints for correcting	Check the Activity End Date you have entered – it cannot be greater than today's date. Adjust the Activity End Date to be the correct date that the activity ended.

Error	Description
RM-P52-17	The Activity End Date Time is before the Activity Start Date Time.
Hints for correcting	Check the Activity End Date/Time you have entered. It must be after the Activity Start Date/Time. If the activity starts and ends on the same day make sure the *End Time* is after the *Start Time*.

Error	Description
RM-P52-15	The Activity Start Date Time is before the Referral Start Date Time.
Hints for correcting	Check the Activity Start Date/Time entered – it must be on or after the Referral Start Date/Time. If the Activity starts on the same day as the Referral, make sure the Activity Start *Time* is on or after the Referral Start *Time*.

Errors relating to referrals that have ended

Error	Description
RM-P42-34	The Referral End Date Time is before the Activity End Date Time or Classification End Date Time or Collection Occasion Date Time.
Hints for correcting	Check the Referral End Date/Time entered – it must be on or after the latest Activity End Date/Time. If the Referral ends on the day as an Activity ends, make sure the Referral End *Time* is on or after the Activity End *Time*.

Error	Description
RM-P42-46	Referral To, Referral End Code and Referral End Date Time must all be supplied when any one of the fields is supplied.
Hints for correcting	One or more of the fields Referral To, Referral End Code or Referral End Date Time have not been populated. Check and complete the missing data so that all three fields are populated. ALL of these fields should be populated for closed referrals and NONE of these fields should be populated for open referrals.

3.21   To Log Out of the System

When you are ready to log out of the system, click the **Logoff** button in the top right-hand corner of the screen:
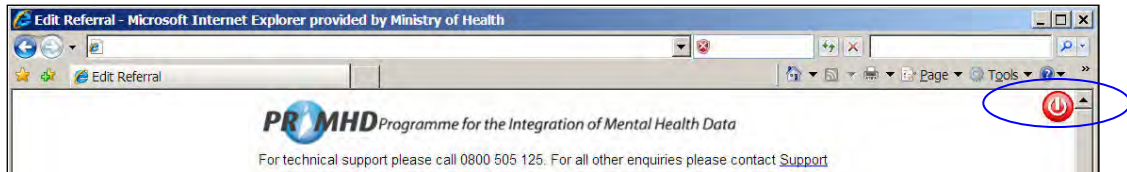
Once logged out you will be presented with the following screen:
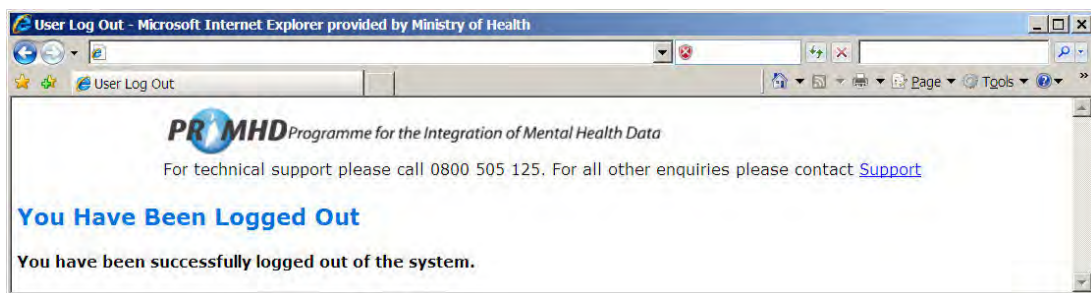
3.22 Flowchart for Data Entry
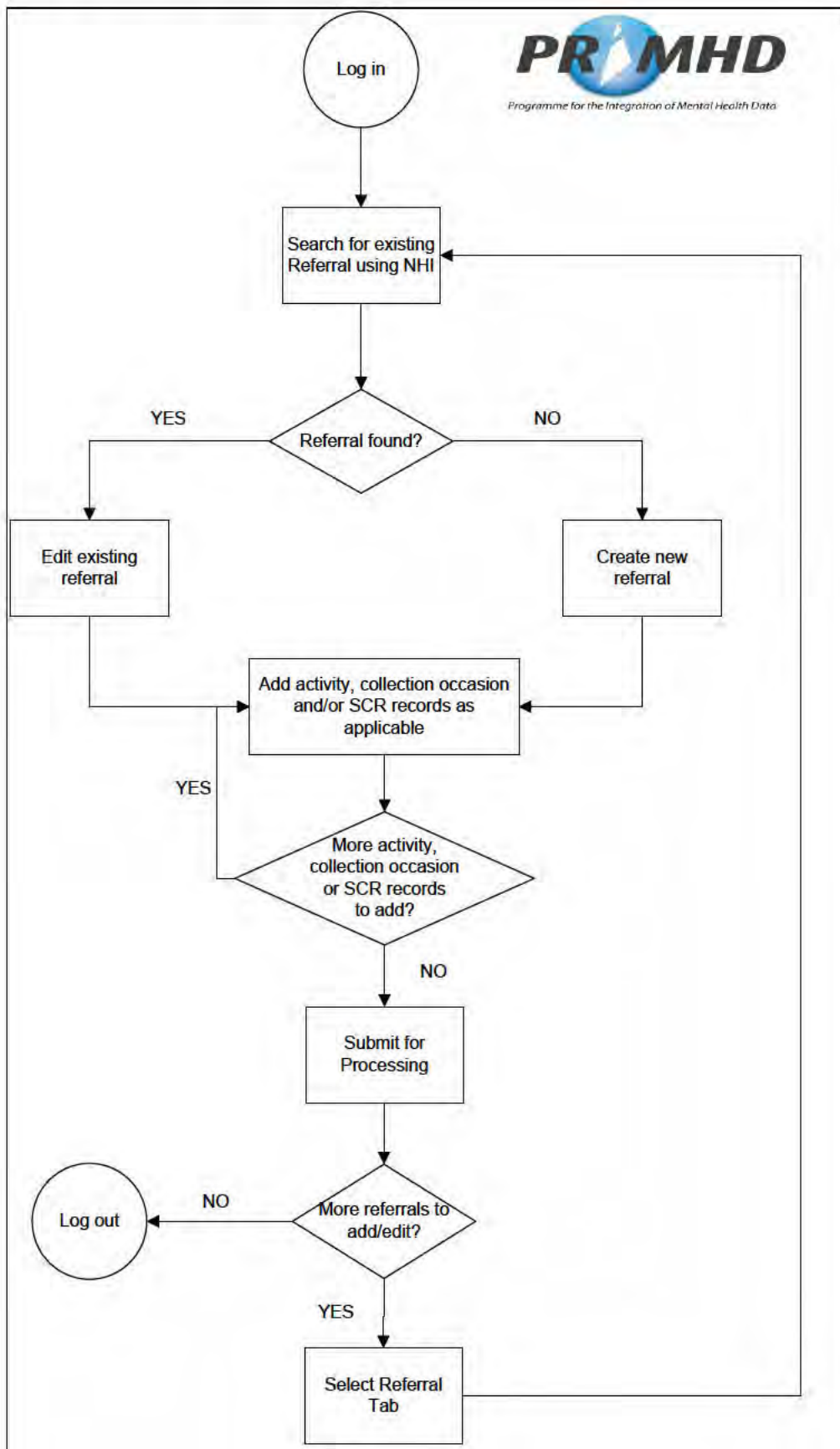
3.23   Helpful Hints

This section contains a few hints to make your use of PRIMHD Online as easy as possible.

Browser
Back Button

Please avoid use of the browser back button.

If you need to go back, please select the Referrals tab instead, and start again from there.

Use of Tab

When entering data in PRIMHD Online you can use the Tab button on your keyboard to navigate through the fields. This can save you time.
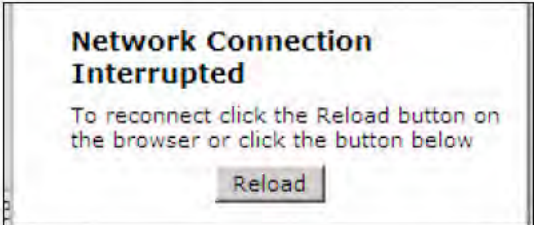
If you are tabbing on the Add New Activity screen, and are not using the calendar icon to select dates, we recommend "double-tabbing" (tabbing twice quickly) from the Activity Start Date field to get to the Activity Start Time field. If you tab to the calendar icon and pause before tabbing again to get to the time field you may find that the cursor focus shifts to the top of the page. If this happens you will need to use your mouse to click in the Time field to return the focus.
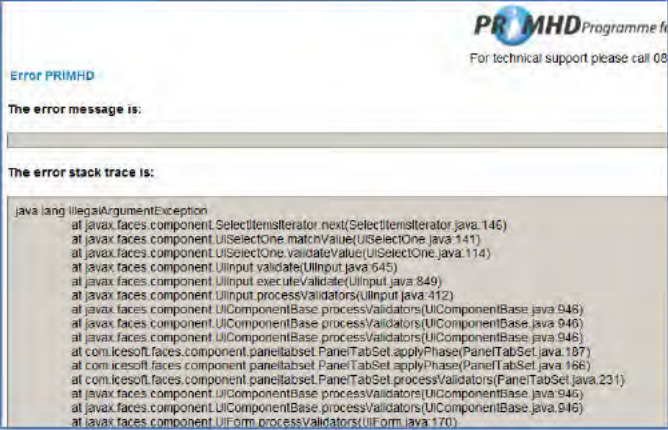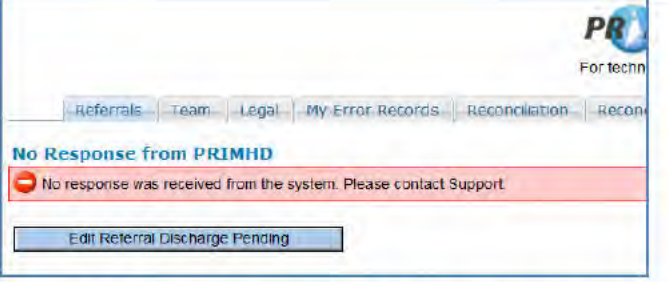
3.24   Trouble Shooting

Problem	Suggested resolution
Incorrect password entered	Ensure the CAPSLOCK key is not switched on and try to enter your password again – passwords are case sensitive. If you forget your password please email: primhduserinterface@health.govt.nz
Screen freeze	Check that your internet connection is still working and if in doubt, contact your Internet Service Provider.
Timed out	If the system is not used for fifteen minutes, it will time out and any data on screen will not be saved. If a user's session is terminated the user will have to restart their browser before attempting to log in to the system again.
Cannot get to the login page	Check that your internet connection is still working and if in doubt, contact your Internet Service Provider
Network Connection Interrupted Error	**Network Connection Interrupted** To reconnect click the Reload button on the browser or click the button below Reload You may get this error if there is an issue with the Network Connection, or if the system takes too long to submit data for processing. If you get this message, press the Reload button and attempt to submit your data again. If the problem persists, please email: primhduserinterface@health.govt.nz

Transport Error:
404 Error: Not found
	PR MHD Programme for the Inte
	For technical support please call 0800 505 12
	
	Error PRIMHD
	The error message is:
	Transport error, 404 Error. Not Found
	
	The error stack trace is:
	org.apache.axis2.AxisFault: Transport error: 404 Error: Not Found
	    at org.apache.axis2.transport.http.HTTPSender.handleResponse(HTTPSender.java:29
	    at org.apache.axis2.transport.http.HTTPSender.sendViaPost(HTTPSender.java:190)
	    at org.apache.axis2.transport.http.HTTPSender.send(HTTPSender.java:75)
	    at org.apache.axis2.transport.http.CommonsHTTPTransportSender.writeMessage(Http
	
	This error means there is an issue with the user authentication software that PRIMHD uses. If you get this message please call 0800 505 125 and tell them the details of this error message.

Problem	Suggested resolution
Stack Trace Error	 This error often occurs when a user has been entering their data very quickly (e.g. tabbing quickly between fields). Slowing down data entry a little bit can help prevent this from occurring. If the problem persists, please email: primhduserinterface@health.govt.nz
No response from PRIMHD message	 Users may experience difficulty submitting referrals for processing when they have about 1000 activity records attached, due to a timeout. It may be necessary to close the referral and start a new one with activity from that point on to avoid this. Please contact primhduserinterface@health.govt.nz if you have queries about this.
Unable to see all activity records on a referral	If a referral has more than 100 activity records attached, only 100 will be displayed underneath the referral details on the View Referral screen. The 100 displayed will be those most recently added or edited. If you proceed to the Edit Referral screen you will see the full list of activity records listed.

4. Glossary and Terminology

4.1   Introduction

This chapter is intended as a guide for the use of the data and other associated terms in PRIMHD Online. It is expected that readers will use this chapter for general reference purposes when they have a query about data, the fieldnames or other terminology used on the record screens.

Where a term is referred to in another definition, then the term appears in:

- **bold** and *italics* if a screen field
- **bold** and **non-italics** if a glossary term.

4.2   Glossary

Glossary Terminology   The following table lists all the Glossary Terms and Meanings as used and understood for use in PRIMHD Online.

Term	Meaning
Activity	PRIMHD describes all Mental Health & Addiction services provided to a **consumer** as an 'Activity'.
	Activities include services delivered to a **consumer** once an interaction happens between the **consumer** and the service provider. A service may take a variety of forms such as, but not limited to: treatment and/or support provided by a mental health and addiction inpatient facility, or by a specialised mental health outpatient clinic either on healthcare sites or within the community, or by a residential facility. For example, the service may be provided on a one-to-one basis, as part of a group session via telephone or via audio-visual links. An activity may also include support services, such as assistance with housing or employment.
	Activities can be provided by a variety of different teams, including teams that would normally operate in the community or outpatient setting, providing services to consumers within an inpatient or residential setting.
	Activity information collected relates to: 1. The type of service provided; 2. The Mental Health and Addiction team and healthcare worker that provided the service; 3. The service setting; 4. The start and end date and time of the activity
	Activities set in outpatient clinics or within the community are generally measured in terms of contacts with the consumer.
	For inpatient and residential settings, duration is generally measured in "bed nights". A "bed night" is a bed occupied at midnight. If a bed is held for the **recipient**, but unoccupied, it is to be given an *activity type* of "on leave".
	As the **user** saves a record, this system automatically allocates an *Activity ID*. Each activity is associated with its relevant **referral** by use of the *Referral ID*
ADOM	Alcohol and Drug Outcome Measure
Collection	A national set of information and data, to a specific part of the heath sector. These collections are available for reporting, management and operational purposes. Users include researchers, Te Whatu Ora and Manatū Hauora staff.
Collection Occasion	The Collection Occasion Record in PRIMHD is where details about outcomes are recorded. This allows the tracking of the consumer's progress with the services (activities) they are receiving.

Term	Meaning
Consumer	This is the PRIMHD term for the person accessing mental health services.
CPN	Common Person Number. The Healthcare Worker CPN is a unique lifetime identifier for all New Zealand, which takes precedence over all other identifiers, for workers providing health care services.
DMS	Data Management Services – Te Whatu Ora area charged with the ongoing support and operation of various health systems including PRIMHD.
HPI	The Health Practitioner Index (HPI) is the central source of core information about all registered practitioners. The HPI system helps identify and provide information on practitioners, health workers, organisations and facilities.
NGO	Non-Governmental Organisation. These organisations hold contracts with Te Whatu Ora to provide mental health services.
NHI	The National Health Index assigns unique identifiers to all health consumers. Other more common references to the **consumer** or **patient** are **Healthcare User** or **Client**. Each **Client** in PRIMHD has a unique coded identifier called the NHI Number. The NHI Number is used so that clinical information can be shared between Health Providers and Clinicians, who are caring for the same client, by protecting their privacy without using the Client's name and other personal details.
PRIMHD	Programme for the Integration of Mental Health Data. (pronounced "primed")
Referral	The Referral, also known as the Referral-Discharge, can be a: 1. Request for management of a problem or provision of a service, e.g. a Request for an investigation, intervention or treatment; 2. Notification of a problem with the hope, expectation or imposition of its management, e.g. an exit summary in a setting, which imposes care/support responsibility on the consumer. The common factor in all referrals is a communication whose intent is the transfer of care/support, in part or in whole request to a Mental Health and Addiction service **team**. The request can be made by: 1. the **consumer** or their family, whānau, or another significant person, or 2. from one **team** to another. In this case the requesting **team** may or may not transfer responsibility 3. via another agency. All these requests shall be recorded as a new referral. To ensure information on un-met demand is not lost, declined requests must also be recorded. Within a referral, a particular team will be allocated responsibility for the **consumer**. This team will be responsible for ensuring that a comprehensive assessment has been completed or assessment information, is received and that all **activities** associated with the team's referral are recorded. Where two or more teams have a joint treatment with a **consumer**, then each **team** would have their own referral to record separate **activities**. A referral must be closed when the **team** is no longer providing services to the **consumer**. The **PRIMHD** Referral Discharge ID (*Referral ID*) is a unique identifier that identifies a Referral Discharge episode for a **consumer** and is the primary key that links the relevant **activities**. As the **user** saves a record, this system automatically allocates a *Referral ID*. It may be useful for the NGOs to add these IDs to their own records.

Term	Meaning
Supplementary Consumer Record (SCR)	Supplementary Consumer Record (SCR) is the collection of social outcome measures intended to complement existing measures of outcome by providing information on the social contexts relevant to a service user's care. There is a change in the requirements for when SCR data are expected to be reported to PRIMHD from 1 July 2021. The reporting guidelines have been updated to state that there is no expectation that a SCR is to be reported until there have been 3 face to face activities. This is in line with the PP7 reporting for wellness plans. In addition, we are now allowing for the fact that some organisations don't need to report them at all depending on the type of service they provide.
Team	An **NGO** group that conducts a treatment programme for a **consumer**.
User	Within this manual, the user is the person responsible for entering the **NGO's** data.

4.3 Data Fieldnames

4.3.1 Introduction

The terminology for the data fieldnames of this section of the User Guide lists each fieldname in alphabetical order and provides supporting information of the interpretation or meaning of the data fieldname, its guide for use and the section reference of the records screen that it is used for in PRIMHD Online.

Guideline notes for use of this section are:

- Names in brackets after the actual fieldname describe the implied association.
- Unless specifically stated, data values can be modified at later dates, but the validation rules would still be applied.
- "**Required**" options are:
  - "Mandatory" - Must be completed or filled with data.
  - "Optional" - Does not have to be completed or filled with data.
  - "Conditional" - Must be completed or filled with data when other data or validation rules are applied or initiated.
  - "Automatically Generated"- Sourced and completed or filled with the correct data by the system.
- Unless specifically stated for a data element, editing rules are applied as the data is saved or submitted.

4.3.2 Data Fieldnames Terminology	The following table lists all the Data Fieldnames in PRIMHD Online in strict alphabetical order.

Screen Fieldname	Meaning and/or Guide for Use
Accommodation Status	**Definition:** A code to identify the accommodation status of a tangata whaiora/consumer
	Required: Mandatory in Supplementary Consumer Records for referrals starting on or after 1 Jul 2016
	Example value: 2 - Supported
	Editing rules: Must be a list box value
	Comments:
Activity End Date Time	**Definition:** The date and time the activity ended
	Required: Conditional – required for all non bed-night activities
	Example value: 25-02-2009 08:10
	Editing rules: Must be a valid date and time combination
	Comments: 1. If the time is unknown, use 23:59
Activity ID	**Definition:** The Activity ID is a unique identifier that identifies a single Activity Record for the **consumer**. This uniqueness applies to all **PRIMHD** activities – i.e. not just those submitted by this web system
	Required: Automatically generated by the system as the record is saved. This unique identifier is generated by a combination of: • The prefix "NGOWEBACT" which is common for all this System's data entry • A unique number, implemented for each new activity entered for this system by any **NGO**
	Example value: NGOWEBACT0000482
	Editing rules: Not applicable
	Comments: 1. As it is system generated it cannot be modified 2. **NGO's** may wish to add this ID to their own records 3. Freeform entry on search screen is allowed
Activity Setting	**Definition:** Classification of the location where the **activity** took place.
	Required: Mandatory
	Example value: DM – home
	Editing rules: Must be a list box value
	Comments:
Activity Start Date Time	**Definition:** The date and time the **activity** started
	Required: Mandatory
	Example value: 25-02-2009 11:03:00
	Editing rules: Must be a valid date and time
	Comments: 1. If the time is unknown, enter 00:00

Screen Fieldname	Meaning and/or Guide for Use
Activity Type	**Definition:** The type of Mental Health & Addiction service **activity** provided
	Required: Mandatory
	Example value: T42 – face-to-face consultation
	Editing rules: Must be a list box value
	Comments:
Collection Date	**Definition:** The date and time the Supplementary Consumer Record data was collected
	Required: Mandatory in Supplementary Consumer Records for referrals starting on or after 1 Jul 2016
	Example value: 25-07-2016
	Editing rules: Must be a valid date
	Comments: 1. It is not possible to submit more than one SCR record with the same collection date on a referral.
Collection Occasion Date Time	**Definition:** The date and time the collection occasion data was collected
	Required: Mandatory
	Example value: 25-02-2014 11:00:00
	Editing rules: Must be a valid date and time
	Comments: 1. If the time is unknown, enter 00:00
Collection Occasion ID	**Definition:** A unique identifier that identifies a single Collection Occasion Record for the **consumer**. This uniqueness applies to all **PRIMHD** collection occasion records – i.e. not just those submitted by this web system
	Required: Automatically generated by the system as the record is saved. This unique identifier is generated by a combination of: • The prefix "NGOWEBCO" which is common for all this system's data entry • A unique number, implemented for each new collection occasion entered for this system by any **NGO**
	Example value: NGOWEBCO000005421
	Editing rules: Not applicable
	Comments: 1. As it is system generated it cannot be modified 2. **NGO's** may wish to add this ID to their own records 3. Freeform entry on search screen is allowed
Collection Status	**Definition:** The status of the data recorded on the Collection Occasion Record, and, if missing data is recorded, the reason for the non-completion of the measure.
	Required: Mandatory
	Example value: CS01 – complete or partially complete
	Editing rules: Must be a list box value
	Comments:
Completion Date Time	**Definition:** The date and time the collection occasion was completed
	Required: Mandatory
	Example value: 25-02-2014 11:00:00
	Editing rules: Must be a valid date and time
	Comments: 1. If the time is unknown, enter 00:00

Screen Fieldname	Meaning and/or Guide for Use
Date of Birth	**Definition**: The **consumer's** date of birth.
	Required: Mandatory
	Example value: 27-12-1946
	Editing rules: Must be a valid date and time combination
	Comments:
	1. This date value must match the date of birth value in the **NHI**. If they are different then this may require a correction to the **NHI** record.
Date Record Last Modified	**Definition**: The date and time this referral record was first added or last altered.
	Required: Automatically generated
	Example value: 25-02-2009 08:04
	Editing rules: Not applicable
	Comments:
	1. If the record has not been updated, then this data is the date and time when the record was first created.
Education Status	**Definition**: A code to identify the education status of the tangata whaiora/consumer
	Required: Mandatory in Supplementary Consumer Records for referrals starting on or after 1 Jul 2016
	Example value: 2 - No
	Editing rules: Must be a list box value
	Comments:
Employment Status	**Definition**: A code to identify the employment status of the tangata whaiora/consumer
	Required: Mandatory in Supplementary Consumer Records for referrals starting on or after 1 Jul 2016
	Example value: 2 - In Paid employment for 1 to less than 30 hrs a week
	Editing rules: Must be a list box value
	Comments:
End Date Time	See *Referral End Date Time* or *Activity End Date Time* as appropriate.
Family/ Whānau Involvement	**Definition**: A code to identify the involvement of family/ whānau in an activity to support tangata whaiora/consumer.
	Required: Expected to be reported on activity records from 1 July 2021 onwards.
	Example value: 1 – Yes. Client with Family/ whānau, or 2 – No. Client only.
	Editing rules: Not applicable.
	Comments: To indicate involvement as 1 – Yes, whānau should have been involved for all or part of an activity.
Focus of Care	**Definition**: Indicates what the focus of care was in the preceding period.
	Required:
	Example value: FC11 – active treatment
	Editing rules: Must be a list box value
	Comments:
	1. Only codes FC10 – FC12 can be used when the tool type version is M1 – ADOM.

Screen Fieldname	Meaning and/or Guide for Use
Healthcare Worker CPN	**Definition:** The HPI identifier of the responsible Healthcare worker associated with the service activity. The healthcare worker Common Person Number (CPN) is a unique lifetime identifier for all New Zealand, which takes precedence over all other identifiers, for workers providing health care services. A healthcare worker will be identified with the use of a **HPI** Common Person Number (HPI CPN). (Refer HISO HPI Data Set 10005 and HISO HPI Code Set 10006)
	Required: An optional entry which should be used if the correct value is known. Some **NGOs** may elect to make it compulsory for their organisation's use
	Example value: 94TYGR
	Editing rules: The number must be in the format NNAAAA, 2 digits followed by 4 alphabetic characters, it must also have a matching HPI entry.
	Comments: 1. Currently HPI CPNs are only being allocated to Clinical Healthcare Workers. As more Health Care workers have their CPN allocated, more activities will have this value recorded.
NHI Number	**Definition:** The National Health Index (**NHI**) number is used to identify the **recipient** of the **referral** and its **activities**. PRIMHD uses the term **consumer** for **recipient**.
	Required: Mandatory
	Example value: ZZZ1234

	Editing rules:
	1. Must be 3 characters followed by four digits
	2. When submitted to PRIMHD:
	   • The **NHI** number must be registered in the NHI system
	   • The sex and date of birth entered for this **consumer** must match the **NHI** record

	Comments: 1. The user must enter the correct value 2. NHI Numbers can be obtained from 0800 855 151 3. Users should check and, if necessary, provide correct details to update the **NHI** if the sex or date of birth values on the NHI are incorrect.

Screen Fieldname	Meaning and/or Guide for Use
Organisation ID	**Definition:** The Organisation Identifier from the Health Practitioner Index, the **HPI** Organisation ID, will be used to define the organization providing service. This is a unique lifetime identifier for an organisation assigned by the HPI system which takes precedence over all other identifiers, for organisations providing health care services. An organisation is the entity that provides services of interest to, or is involved in, the business of the health care service provision. There may be a hierarchical (parent-child) relationship between organisations
	Required: Automatically generated by the system configured for the NGO
	Example value: G01059-E
	Editing rules: Not applicable
	Comments: 1. This is already populated for each NGO's as it is configured by **DMS**.
Outcome Episode ID	**Definition:** A unique identifier assigned to the consumer's episode by the NGO, which the collection occasion record forms a part of.
	Required: Optional
	Example value: 12345678
	Editing rules: Free-text entry
	Comments:
Outcome Item Code	**Definition:** A coded identifier that indicates the outcome measure item that is being measured
	Required: Automatically generated
	Example value: 01 – Alcohol use in the past four weeks – days of use
	Editing rules: Not applicable
	Comments:
Outcome Item Value	**Definition:** A code that indicates the consumer's outcome score for a particular item measured as per the protocol for a particular measurement tool.
	Required: Mandatory apart from values for 7a-f and 9b-c.
	Example value: 26 – 26 days
	Editing rules: Must be a list box value
	Comments: 1. The list of values for each outcome item is different depending on the outcome item.
Outcome Tool Type Version	**Definition:** The tool used to gather the collection occasion data
	Required: Mandatory
	Example value: M1 - ADOM
	Editing rules: Must be a list box value
	Comments: 1. The only tool type able to be selected is M1 – ADOM.

Screen Fieldname	Meaning and/or Guide for Use
Password	**Definition:** User unique password used for checking authority to access the system
	Required: Mandatory
	Example value: --
	Editing rules: --
	Comments: 1. The full rules re security of use supplied as the user is set up apply 1. The password must be at least 6 characters and is case-sensitive.
Protocol Version	**Definition:** The version of the Information Collection Protocol under which the data has been collected and submitted.
	Required: Optional
	Example value: 0140 – Version 1.4
	Editing rules: Must be a list box value
	Comments: 1. 0140 – Version 1.4 is the correct version to be used when the tool type version is M1 – ADOM.
Reason for Collection	**Definition:** The reason for the collection occasion data to be collected
	Required: Mandatory
	Example value: RC15 – assessment only
	Editing rules: Must be a list box value
	Comments: 1. Only codes RC13 – RC21 can be used when the tool type version is M1 – ADOM.
Referral End Code	**Definition:** The reason the referral ended
	Required: Conditional – must be supplied whenever the *Referral To* and the *Referral End Date* are supplied
	Example value: DR – Ended Routinely
	Editing rules: Must be a list box value
	Comments:
Referral End Date Time	**Definition:** The date (and time) a **referral** ends.
	Required: Conditional – must be supplied whenever the *Referral To* and the *Referral End Code* are supplied
	Example value: 25-02-2009 08:23
	Editing rules: Must be a valid date and time combination
	Comments: 1. If the time is unknown, use 23:59
Referral From	**Definition:** The **referral** source
	Required: Mandatory
	Example value: GP
	Editing rules: Must be a list box value
	Comments:

Screen Fieldname	Meaning and/or Guide for Use
Referral ID	**Definition:** The Referral ID is a unique identifier that identifies a **consumer's referral** record. This uniqueness applies to all **PRIMHD** referrals – i.e. not just those submitted by PRIMHD Online.
	Required: Automatically generated by the system as the record is saved. This unique identifier is generated by a combination of: • The prefix "NGOWEBREF" which is used for all referrals entered via PRIMHD Online, and • A unique number, implemented for each new referral entered for this system by any **NGO**
	Example value: NGOWEBREF0000145
	Editing rules: Not applicable
	Comments: 1. This cannot be modified. 2. Freeform entry on search screen is allowed 3. It may be helpful for the **NGO** to store this key with their records
Referral Start Date Time	**Definition:** The date (and time) the **referral** started
	Required: Mandatory
	Example value: 25-02-2009 11:01
	Editing rules: Must be a valid date and time
	Comments 1. Recorded as date and time 2. When used as a search parameter, time is not entered 3. If the time is unknown, record 00:00
Referral To	**Definition:** Records where the **consumer** is referred to.
	Required: Conditional – must be supplied whenever the *Referral End Code* and the *Referral End Date* are supplied
	Example value: NR – No further referral
	Editing rules: Must be a list box value
	Comments:

Screen Fieldname	Meaning and/or Guide for Use
Sex	**Definition:** The **consumer's** sex
	Required: Mandatory
	Example value: F – Female
	Editing rules: 1. Must be a value in the drop-down list 2. Must match the **NHI** value
	Comments: 1. If the **NHI** entry is wrong, then this must be corrected
Start Date Time	See *Referral Start Date Time* or *Activity Start Date Time* as appropriate.

	Supplementary Consumer Record ID	**Definition:** A unique identifier that identifies a single Supplementary Consumer Record for the **consumer**. This uniqueness applies to all **PRIMHD** collection occasion records – i.e. not just those submitted by this web system
		Required: Automatically generated by the system as the record is saved. This unique identifier is generated by a combination of: • The prefix "NGOWEBSCR" which is common for all this System's data entry • A unique number, implemented for each new collection occasion entered for this system by any **NGO**
		Example value: NGOWEBSCR000005434
		Editing rules: Not applicable
		Comments: 1. As it is system generated it cannot be modified **1. NGO's** may wish to add this ID to their own records 1. Freeform entry on search screen is allowed
	Team Code	**Definition:** The code for the **NGO's** team that the user is entering the referral and activity data for.
		Required: Mandatory
		Example value: 7316
		Editing rules: The team code must be one of the codes allocated to the organisation.
		Comments: 1. Team code records are managed by Data Management Services National Collections Team.
	To Be Deleted	**Definition:** A "yes" in this field shows this activity will be deleted when the referral is next submitted.
		Required: Set when an activity is being edited and **[Delete]** is clicked.
		Example value: "Yes" appears if record is to be deleted.
		Editing rules: When the delete button is pressed, confirmation that the delete is required is requested.
		Comments: 1. A confirmed delete request cannot be reversed. 2. A 'reversal' can be achieved by re-entering the details.

Screen Fieldname	Meaning and/or Guide for Use
User ID	**Definition:** User's identification code entered as they logon.
	Required: Mandatory
	Example value: jsmith
	Editing rules: Verified with password by system security.
	Comments:
	1. This user ID must be loaded along with the correct password as the user logs into the system
	2. The User ID is supplied by Data Management Services National Collections Team.
	3. The organisation must also request the removal of the access authority for all users that leave.
Wellness Plan	**Definition:** A code to identify if a Wellness (Relapse Prevention or Transition) plan is in place
	Required: Mandatory in Supplementary Consumer Records for referrals starting on or after 1 Jul 2016
	Example value: 1 - Yes
	Editing rules: Must be a list box value
	Comments:

5. Appendix B – Document History

5.1 Document History

Version	Reason for change	Date
Version 2.6	Amended Screenshots to mask NHI information. Updated branding to Te Whatu Ora and references to the Ministry of Health. Updated website links.	Oct 2023
Version 2.5	The main change is the addition of a new field named Family/ Whānau Involvement in the Activity Tab, and removal of mandatory requirement as seen in section 3.16 for Supplementary Consumer Records (SCR). These changes were provided in the NCAMP21 updates which became effective on 1 July 2021. Added new notes to section 3.11 to explain how to use the newly added Family/ Whānau Involvement element in the Activity Tab. Updated relevant example screenshots to reflect the appearance of the activity tab screen with the newly added element. Updated sections 4.2 (Glossary) and 4.3.2 (Data fieldnames). Other minor updates made throughout to enhance clarity.	Jul 2021
Version 2.4	Updated email addresses due to change at Ministry of Health. Added section 3.9 to include guidance on how to close a referral in the guide. Other minor updates made throughout.	Sep 2019
Version 2.3	Updated section 3.2 to add in details about NZ Health Certificate and the need to install this for some browsers.	Nov 2018
Version 2.2	Updated to reflect the changes introduced at 1 July 2016. The main change is the addition of the ability to report Supplementary Consumer Records (SCR) via PRIMHD Online. Other updates have been made – change to minimum OS/browser pre-requisites, and number of activity records attached to a referral that may cause issues with submitting changed from 1500 to 1000. Detailed data screen details in the later sections have been removed/merged into section 3 to condense the document.	July 2016
Version 2.1	Updated to reflect the changes introduced at 1 July 2014 that resulted from the HISO review. The main impact to PRIMHD Online is the introduction of the ADOM outcome measure, and the ability to submit collection occasion records via PRIMHD Online. Other minor updates have been included also to bring the document up to date.	July 2014
Version 2.0	First version of the combined document – combining the "Training Manual for NGOs Using the Web Data Entry System" and the "NGO Web Data Entry User Manual" to provide a single source document to train and support PRIMHD Online – the NGO Web Data Entry System.	February 2010
Version 1.0	Final version of initial separate document PRIMHD Web Data Entry User Manual.	August 2009