



Programme for the Integration of Mental Health Data

PRIMHD Online

Training Manual and User Guide

Date: October 2023 Version: 2.6 Final



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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 <u>cannot</u> 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-healthstatistics/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: <u>https://www.tewhatuora.govt.nz/assets/Our-health-system/Data-and-statistics/NZ-health-stats/National-collections-and-surveys/Collections/PRIMHD/ngo-guide-toprimhd-171219.pdf</u>
- 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-healthstatistics/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: <u>https://www.tepou.co.nz/initiatives/alcohol-and-drug-outcomemeasure/adom-training</u>
- Has a copy of the Guide to PRIMHD Supplementary Consumer Record requirements, including social outcome indicators (available from the Te Pou website). <u>http://www.tepou.co.nz/resources/guide-to-primhd-supplementary-consumer-record-collection-and-use/706</u>

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 <u>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</u>



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 <u>primhduserinterface@health.govt.nz</u>. Clicking on the <u>support</u> 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: <u>BusinessIntelligence@health.govt.nz</u>



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: <u>https://primhdonline.moh.health.nz</u>

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.

Certificate Error: Navigation Block	ed - Microsoft Internet Ex	plorer provided by Ministry of H	ealth		- 8 ×
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The security certif authority. The security certif Security certificate send to the serve We recommend	icate presented by the problems may indicate presented by the problems may indicate that you close this use this webpage.	ate an attempt to fool yo			4



Accessing the PRIMHD Online Website, Continued

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)".

Privacy error X +	
C A Not secure Https://primhdonline.moh.health.nz	
	A
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	Attackers might be trying to steal your information from primhdonline.moh.health.nz
	(for example, passwords, messages, or credit cards). <u>Learn more</u>
	Advanced Back to safety
	Holdings
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Your connection is not	private
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(for example, passwords, messages, o	
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[maintaine and]	[incompany]
Hide advanced	Back to safety
	primhdonline.moh.health.nz; its security certificate
	Names. This may be caused by a misconfiguration or
an attacker intercepting your connec	tion.
Proceed to primhdonline.moh.health.nz (u	insafe)



Accessing the PRIMHD Online Website, Continued

Once you are taken to the login page, a red triangle and error message stating "**Not secure**" might remain in the URL.

PointDProgramme for the Integration of Mental Health Data For technical support please call 0800 505 125. For all other enquiries please contact Support Username Password	C A Not secu	e https://primhdonline.moh.healthinz	>
For technical support please call 0800 505 125. For all other enquiries please contact Support Username			
For technical support please call 0800 505 125. For all other enquiries please contact Support Username			
Username			DD MUD
			For technical support please call 0800 505 125. For all other enquiries please contact Support

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 <u>primhduserinterface@health.govt.nz</u>.

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: <u>https://ca.healthlink.net/cacerts/</u>

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.





Accessing the PRIMHD Online Website, Continued

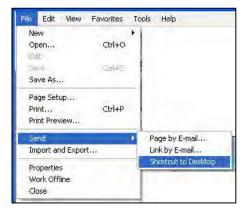
Internet Explorer users: Click on **Favourites** at the top of the screen and choose **Add to Favourites**.

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	E Login - PRIMHD	

Firefox users: Click on **Bookmarks** at the top of the screen and choose **Bookmark This**Page

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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.

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	<i>mme for the Integration of N</i> please call 0800 505 12!	<i>lental Health Data</i> 5. For all other enquiries (please contact <u>Support</u>	*
	Username Password Login	Forgot Password]	
				7

The first time the system is accessed, a screen will appear prompting you to change your password.

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 Input old password 		_		
 Input new password 		_		
 Confirm new password 				
Change 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.

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Login Instructions and Screen Basics, Continued

Further notes about	If a user does not use the system for more than 15 minutes, they will be automatically logged out.						
passwords	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:						
	 The page number selection facilities to view the search results are If I = 2 = 3 + 5 The paired arrow functions are: If To go to the first page – its opposite symbol goes to the last page If To go 5 pages left – its opposite symbol goes 5 pages right If o go one page left – its opposite symbol goes one-page right Also shown is the count of displayed records from a search, the number of pages of results and the page being displayed. 						
	 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 NGOWEBREF00015817788 NGOWEBREF000157788 						
	 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.

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eferral ID goodstand				
eferral ID	s BFor example 26-10-2008	3		

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: // calonaal chowing the cal									
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						1			
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9	10	11	12	13	14	15			
16	17	18	19	20	21	22			
23	24	25	26	27	28	29			
30	31								

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 ^{III} 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:

Search Referrals - Micro	soft Internet Explorer provided by Ministry	of Health	-18 ×
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Referrals Search Referrals	For technical support please c	me for the Integration of Mental Health Data all 0800 505 125. For all other enquiries please contact Support	@ *
Reterral ID Organisation ID Team Code NHI Number (HCU ID)	G00069-E **		
Referral Start Date	ndicates mandatory fields	pie 26-10-2008	

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

Search Referrals

Referral ID Organisation II Team Code						
IHI Number (H						
Referral Sean		-				1
	Referral ID -	Team Code	NHI NUMBER (HCU ID)	Start Date	End Date	Last Modified Dat
		Team Code 7314		Stan Date 01-07-2008 00:00	End Date 07-00-2008 20.69	Last Modifies Dal
	Referral ID		NHI Number (HCU ID) S 9(2)(a)			
F	Referral ID -	7314		01-07-2008 00 00		27-04-2009
F	Referral ID REFMOHEW011000003 REFMOHEW011000065	7314 7314		01-07-2008 00 00 30-06-2008 12:00	07-08-2008 23 59	27-04-2009 15-04-2009
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5 5 5 5 5	Referral ID - REFMONEW011000065 REFMONEW011000065 REFMONEW011000075 REFMONEW011000076 REFMONEW011000077	7314 7314 7314 7314 7314 7314		01-07-2008 00 00 30-06-2008 12:00 21-07-2008 09:00 02-05-2008 09:00 06-05-2008 09:00	07-08-2008 23 59	27-04-2009 15-04-2009 31-08-2008 31-08-2008 31-08-2008
5 5 5 5 5 5	Referral ID - REFMONEW01000063 REFMONEW01000005 REFMONEW01000072 REFMONEW01000076 REFMONEW01000077 REFMONEW01000085	7314 7314 7314 7314 7314 7514 7314		01-07-2008 00 00 30-06-2008 12:00 21-07-2008 09:00 02-05-2008 09:00 06-05-2008 09:00 30-06-2008 09:00	07-08-2008 23 59	27-04-2009 15-04-2009 31-08-2008 31-08-2008 31-08-2000 31-08-2008

7314

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

REFMOHEW011000158

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.

1-07-2008 00 00

The blue/white round icon on the left of the Referral ID means that this particular referral has not yet been submitted for processing <u>or</u> 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 ...

31-08-2008



Search Existing Referral Records, Continued

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** :

Search Referrals - Micro	soft Internet Explorer provided by Ministry of Health		_ 8 >
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Referrals	For technical support please call 0800 505 1 My Error Records	tegration of Mental Health Data 25. For all other enquiries please contact <u>Support</u>	
Referral ID Organisation ID Team Code NHI Number (HCU_ID) Referral Start Date	G00059-E ** 1234 16-10-2008 EFor example 26-10-200 ** Indicates mandatory fields Search Clear Cancel New	8	

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

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Referrals	For technical support please call 0800 505 125 For a My Error Records		
Search Referral			
Search Referral: Referral ID Organisation ID Team Code NHI Number (HCU_ID)	G00059-E *** 1234		





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:

osoft Internet Explorer provided by Ministry o	of Health
	🗾 🚰 🐓 🗙 Google 🖉 🖉
s Tools Help	Links
als	🟠 + 🗟 - 📾 + 🔂 Page + 🎯 Tools +
For technical support please ca	ne for the Integration of Mental Health Data
G00059-E ** 1234	le 26-10-2008
ra	For technical support please ca My Error Records s

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.

Add New Referral - Micr	osoft Internet Explorer provided by Ministry of Health	_8
🕒 - 🧕		🗾 🔮 😽 🗶 Google
File Edit View Favorite:	s Tools Help	Links
🔓 🕸 🎂 Add New Refe	rral	🏠 🔹 🔂 🕤 📾 🔹 🔂 Page 👻 🌀 Tools 🔹
	PROVIND Programme for the Integration of Mental For technical support please call 0800 505 125. For all other enqu	
Referrals	My Error Records	
Add New Referr		
Organisation ID Team Code	G00059-E	
NHI Number (HCU ID)	**	
Sex	**	
Date of Birth	**	
Referral Start Date	**	
Referral End Date		
Referral From		
Referral To		
Referral End Code		
	** indicates mandatory fields	

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. <u>https://www.tewhatuora.govt.nz/publications/hiso-primhd-code-set-standard/</u>



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:

🖉 Add New Referral - Micr	osoft Internet Explorer provided by Ministry of Health		_ & ×
😋 🕘 🕶 🌆		🛃 🎒 😽 🗙 Google	P -
File Edit View Favorite	s Tools Help		Links »
😭 🍄 🎂 Add New Refe	rral	🟠 + 🗟 - 🖶 + 🖻	Page 🔹 🅥 Tools 👻 🎇
	PRMHD Programme for the Integral	tion of Mental Health Data	O -
	For technical support please call 0800 505 125. For		
	For technical support please call 0800 505 125. Fo	or an other enquines please contact support	
Referrals	My Error Records		
Add New Referr	al		
Compositive conversion			
Organisation ID	G00059-E		
Team Code	**		
	Field Team Code is required		
NHI Number (HCU ID)	Field NHI Number (HCU ID) is required		
-	***		
Sex	Field Sex is required		
Date of Birth			
Bate of Brai	Field Date of Birth is required		
Referral Start Date			
Referral Start Date	Field Referral Start Date is required Field Start Time is required		
Referral End Date			
Referral From			
Referral To			
Referral End Code	-		
	** indicates mandatory fields		
	Save Clear Cancel Submit for Processin	ng l	



Adding New Referral Records, Continued

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.

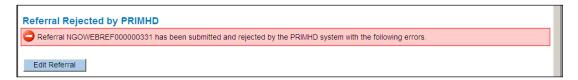
The Add New Activity form will appear below the Add a New Referral form (see Section 3.10 for steps on how to complete this form).

Activity Start Date Time	□ ++	
Activity End Date Time	B	
Activity Type		~
Family/Whănau Involvement		~
Activity Setting	~	
Health Care Worker CPN		
Health Care Worker CPN	ates mandatory fields	

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.

Referral Accep	ted by PRIMHD	
Referral NGOV	VEBREF000002660 has been successfully submitted and accepted by the PRIMHD system.	
Referral Details	3	,
Referral ID	NGOWEBREF000002660	
Organisation ID	G00059-E	

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:

	CLEAN COLUMN	Descent States				
efer	al Search Result					
	1 2 3 4 5 MM					
	Referral ID	Team Code	NHI NUMBER (HOU ID)	Start Date	End Date	Last Modified Date
0	DMSWEBREF000002793	7315	s 9(2)(a)	17-08-2009 15:41		05-11-2009
ø	DMSWEBREF000002832	7315		01-01-2007 11:15		16-11-2009
	DMSWEBREF000002853	7315		10-10-2009 10 10		01-12-2009
Q	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:

Referral ID Crganisation ID Team Code NH Number (HCU ID) Sex Date of Birth Referral Start Date Referral End Date Referral From Referral To Referral To Referral End Code Last Modified Date	DMSWEB G00059-E 7374 S 9(2) (a) 05-01-202 NA - Need 30-06-202 East	1 09:00 5 assess	nent and co-or	dina	tion service				
Activity Clas	sification	Colle	ction Occasi	ón	Supplementary	Consumer Records	¢.,		
Activity ID		Activity Type	Activity Setting		Family/Whénau Involvement	Health Care Worker CPN	Start Date Time	End Date Time	To Be Deleted
DMSWEBACTOD			OS from 1 to 1	2 Pa	gelof1		05-01-2021 09:30	05-01-2021 10:00	

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



Editing Existing Referral Records, continued

		PRMHD Programme for the Integration of Mental Health Data	C
		For lectrical support sease call 5805 505 125 For all other enquiries please contact Support	
adom	My Line Reside		
tdit Referral			
leteral ID manadium ID	NGCWEBREF00000	2660	
tion Cade	7215	0	
en humber pictritty	s 9(2)(a)		
102			
AND OF FARTS		1 St.	
eterral Itlant Cami	20-01-2008	E 07 10 **	
alleinai Eris Dalar	1	0	
etercal Provis	NA - Needs assess	nend and co-ordination service 😽 🦏	
eternai Tu		Ý	
Referral End Code	1	Y	
	Save Lancet	Substit for Processing Dentit Apternal	
		and a county where the a	
in the second			
		Supplementary Consumer Records	
Add New Acti	wity		
Activity riskers Date To	we		

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:

Referral Rejected by PRIMHD	
CRETERIAL 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.



3.8 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:

Jeneral Search Result									
(39	1 🖬 2 3 4 5 8 90 M								
	Referral ID	Team Code	NHI Number (HCU ID)	Start Date	End Date	Last Modified Date			
0	DMSWEBREF000002793	7315	s 9(2)(a)	17-08-2009 15-41	1	05-11-2009			
0	DMSWEBREF000002832	7315		01-01-2007 11:15		16-11-2009			
	DMSWEBREF000002853	7315		10-10-2009 10 10		01-12-2009			
0	OMSWEBREF000002654	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			
		-	B.	a la site a se	the little state	in manine			

The View Referral Screen will open:

Referral ID Organisation ID DMSWEBREF000165321 Organisation ID Referral To Bac Date of Birth Referral To Bac Activity Classification Collection Occasion Supplementary Consumer Records Activity ID Activity Date of Birth Referral To Bac Bac Date Tame To Bac Date Tam To Ba								
Activity Activity Family/Whitnau Health Cave To Be	Depantisation 1D learn Code (HK Number (HCU ID) Sex Date of Birth Refermal Start Date Sefermal Finom Refermal Finom Refermal Finom Refermal To Sefermal To Code	G00059-E 7374 S 9(2) 05-01-202 NA - Need 30-06-202	1 09:00 a aquestani 1 08:35		nation service			
		and the state of	Collet	ction Occasion	Supplementar	v Consumer Records	2	

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



Deleting Referral Records, Continued

P& MHD Programme for the integration of Mental Health Dota	
For technical support please call 0000 505 125. For all other enquires please contact Support	
My favor Executio	
NGCVME BRIEF000000560 G60058-E	
s 9(2)(a)	
20-01-2008 (C 10 ++	
NA - Needs assessment and co-ordination service 🗸 😽	
** indicates mandatory heids Save Cancel Butmit for Processing Detele Reternal	
ction Occasion Supplementary Consumer Records	
	Por technical sapport please call 0888 505 125. For all other enquires please contact Support for Encounds

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

🕘 - 🍯		🖹 💁 🏘 🗶 Booge	ρ.
File Edit Vien Favorite	a Tools Help		Links ³
🎉 🍁 👙 Edit Referral		<u>③・◎・●・</u>	🚱 Page 👻 🌀 Tools 👻 🤇
		A state of the second state of the second	<u>0</u> -
	•	for the integration of Mental Health Data	
	For technical support please call 0	0800 505 125. For all other enquiries please contact <u>Support</u>	
Referrate	HY Error Records		
Edit Referral			
- and the second second			
Referral ID Organisation ID	NGOWEBREF000002660 G00059-E		
Team Cone	7315 **		
MHI Mumber (HCU (D)	s 9(2)(a) Confirm	Deletion	
Ser		sure you wish to delete this record?	
Date of Birth		Yes No	
Referral Start Date	20-01-2008	res	
Referral End Date	3		
Refermal From	NA - Needs assessment and co-ordination	on service	
Referal To		¥.	
Referral End Code		<u>*</u>	
	save Cancel Submit for Pro	ocessing Delete Referra	
	Sale Sale Sale	Second Second	



Deleting Referral Records, Continued

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

(=) - (≦)		🗾 💁 😽 🗶 Google	P-
File Edit View Feverites Tools H	zlp		Links *
🚖 🎶 👍 Referral Deleted		☆ + 回 + 册 + ⊕	Page + 🕤 Tools + '
Fo Referrals My Error Referral Deleted	r technical support please call 0800 505 125. For		•ש
Referral NGOWEBREF00	0002600 has been successfully deleted from	the PRIMHD system.	
Referral ID NGOWEE Organisation ID G00059-F Team Code 7315	REF000002600		

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.

elevral Search Result								
	Referral ID	Team Code	NHI Number (HCU ID)	Start Date	End Date	Last Modified Date		
0	DMSWEBREF000002793	7315	s 9(2)(a)	17-08-2009 15:41	1	05-11-2009		
0	DMSWEBREF000002832	7315		01-01-2007 11 15		16-11-2009		
	DMSWEBREF000002853	7315		10-10-2009 10 10		01-12-2009		
o	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		
	in an in the second second second							

The View Referral Screen will open:

				for the Integration of Mento			6
- Auforture	Ma Erner Repo		il support please call l	olide 605 125. For all other eng	panes please contact Su	oport	
View Referral	ALC: UNIVERSITY						
leterna ID Zigeneakon (D Jam Colte Hi Kanber (HCU ID) Ko Jate of Dem Jate of Dem Seterna I San Dale Jeferna I To Jeferna I	NGC/WE BREF F C000/03-4(7210 S 0-11.27.3 VA - Needs as 13-05-2014 Bat Can	07 10 ssessment and co- sh 16	ordination service				
Activities	ittini Goatta	n Suppleme	ntary Consumer Re Activity Setting	conds Hereith Garo, Vinneet CPM	Start Date Time	Ent Date Tow	To Be Deented
NGÓWEBACTO		T42	CM CM	ream Carl Within Cris	20-12-2008 15-15	20-12-2006 15 45	10 De Deixed
NICHEBACTO	0002542	125	ER		21-27-2008 10 15	21-57-2005 20 10	
	0002541	718	CR		19-87-2008 10:10	19-87-2008 21:21	

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



Closing a Referral, Continued

Referral ID Organisation ID	DMSWEBREF0001 G00059-E	57102		
Team Code	7315	**		
NHI Number (HCU ID)	s 9(2)(a)	**		
Sex				
Date of Birth		5 **		
Referral Start Date	20-01-2008	07:10		
Referral End Date	20-12-2008	15:45		
Referral From	NA - Needs asses	sment and co-ord	ination servic	e
Referral To	GP - General prac	titioner		
Referral End Code	DR - Ended routin	city	_	
	** Indicates mand	latory fields		
	Save Cance	Submit for P	rocessing	Delete Referra

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.

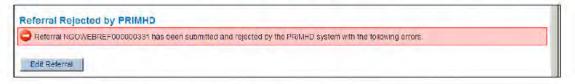
The PRIMHD Code Set Standard document provides a guideline on the correct Referral To and Referral End Codes that should be selected depending on a given scenario. https://www.health.govt.nz/publication/hiso-1002332017-primhd-code-set-standard

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:

Referral Accep	ted by PRIMHD	
Referral NGOV	VEBREF000002680 has been successfully submitted and accepted by the PRIMHD system.	
Referral Details	3	
Referral ID Organisation ID	NGOWEBREF000002660 G00059-E	

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.

nlemal Search Result									
3	KK K 🚺 2 3 4 5 🕅 🕅								
	Referral ID	Team Code	NHI Number (HCU ID)	Start Date	End Date	Last Modified Date			
Q	DMSWEBREF000002793	7315	s 9(2)(a)	17-08-2009 15:41		05-11-2009			
Ó	DMSWEBREF000002832	7315		01-01-2007 11 15		16-11-2009			
	DMSWEBREF000002853	7315		10-10-2009 10 10		01-12-2009			
0	DMSWEBREF000002854	7316		10-10-2008 15.41		01-12-2009			
	NGCWEBREF000002600	7315		10-10-2008 15 15	18-02-2009 20-45	27-07-2009			
	NGOWEBREF000002660	7316		20-01-2008 07 10		07-05-2009			
	The stand a back stand in	all and a		The RIVE IN TH	The second second	A second second			

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:

		PR	HD Programme	for the Integration of Merita	d Health Data		0
		-		sindo 505 125 For all other eng		poort	
Advertise	My Error Room	rdia					
liew Referral							
Retental ID Organisation ID Organisation ID Team Cade 44 Namber (HCU3D) tea Safe of Brith Retental Start Date Retental Start Retental Start Retental Start Retental Start Retental Start	NGOWEBREF Cadatos (7315 5 9(2) 20-01-2006 0 NA Needs ast 13-05-2014 1 Edit Care	7 10 resument and ca- 0 16	ordination service				
Activity Cole	ction Occasion	Suppleme	ntary Consumer Re	cords			
Activities	>						
Active	, ID	Activity Type	Activity Softing	Health Care Viciniai CPN	Shert Date Time	End Dale Time	To Be Deleted
MGOWEBACTDO	0004920	142	CM		29-12-2008 15 15	20-12-2006 15 45	
MOOVEBACT DO	0002942	T25	CR		21-07-2005 10 15	21.07-2008-20 10	
NGOWEBACTIO	0002941	T18	CR		19-87-2008 10 10	19-07-2008 21 21	

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:

Edit Referral					
Referral ID Organisation ID Team Code NHI Number (HCU ID) Sex Date of Birth Referral Start Date Referral End Date Referral From Referral To Referral End Code	DMSWEBREF000 G00059-E 7374 S 9(2)(a) 05-01-2021 -CR - Corrections	···		5 5 5 5	
Activity Class Add New Activ Activity Start Date Tim Activity End Date Tim Activity Type Family/Whitney Involv	vity	Submit for Proc		Consumer Records	2
Activity Setting			Ψ.		

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

ctivity ID	DMSWEBACT002483069			
ctivity Start Date Time	02-01-2021	0 **		
ctivity End Date Time	02-01-2021 🗖 10:0	0.		
ctivity Type	T52 - Health Coaching Contact		✓ ***	
amily/Whanau Involvement	2 - No. Client only		~	
ctivity Setting	OS - Onsite	**		

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: <u>https://www.health.govt.nz/publication/guide-primhd-activity-collection-and-use</u>



Adding New Activity Records, Continued

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.

-	Activity ID	Activity Type	Activity Setting	Health Care Worker CPN	Start Date Time	End Date Time	To Be Deletec
0	NGOWEBACT000003384	742	CM		20-12-2008 15.15	20-12-2008 16:00	
-	NGOWEBACT000002942	T25	CR		21-07-2008 10:15	21-07-2008 20:10	
	NGOWEBACT000002941	T18	CR		19-07-2008 10:10	19-07-2008 21:21	
	NGOWEBACT000002940	T42	CR		20-12-2008 15 15	21-12-2008 20 21	

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

Activity Start Date Time	20-01-2021	II:00	\$C\$		
Activity End Date Time	20-01-2021	12:00			
Activity Type	Field Activity Typ	e is required		~	**
Family/Whanau Involvement	nt			~	
Activity Setting Health Care Worker CPN	CM - Community		**		

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:

and the state	My Oran Rescale	
Edit Referral		
Crystical (D	MISCINE BHR F000002660 G00059 €	1
Niet Code	7315 **	
WE NUMBER (HCM/ID)	s 9(2)	
we,	(a) 👻 🕶	
Selle of Exces		
lefinitral Start Clate	20-01-2008 27 07 10 ++	
leihincei Eins Dahn		
terferinati Pisceni i	NA - Needs assessment and co-ordination service w	
Armeral Tr		
Rettleral End Code	** Indepted mandatory lights	
	Salve Carcel Subrat for Processing Create Reternal	

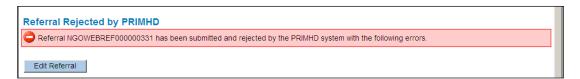


Adding New Activity Records, Continued

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

Referral Accepted	by PRIMHD	
Referral NGOWEBF	EF000002660 has been successfully submitted and accepted by the PRIMHD system.	
Referral Details		-
Referral ID	NGOWEBREF000002660]
Referral ID Organisation ID	G00059-E	

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.

Note:

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

				For techr
Referrals Te	am Legal	My Error Records	Reconciliation	Recor
Response from	PRIMHD			

It may be necessary to close the referral and start a new one with activity from that point on to avoid this. Please contact <u>primhduserinterface@health.govt.nz</u> 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:

	Tace of Total	The second second				
al and	al Search Result					
	Referral ID -	Team Code	NHI Number (HCU ID)	Start Date	End Date	Last Modified Date
0	DMSWEBREF000002793	7315	s 9(2)(a)	17-08-2009 15 41	1	05-11-2009
0	DMSWEBREF000002632	7315		01-01-2007 11 15		16-11-2009
	DMSWEBREF000002853	7315		10-10-2009 10 10		01-12-2009
0	DMSWEBREF000002554	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

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

Activity ID -	Activity Type	Activity Setting	Health Care Worker CPN	Start Date Time	End Date Time	To Be Deleted
NGOWEBACT000002942	T25	CR		21-07-2008 10:15	21-07-2008 20:10	
NGOWEBACT000002941	T18	CR		19-07-2008 10:10	19-07-2008 21:21	
NGOWEBACT000002940	T42	CR		20-12-2008 15:15	21-12-2008 20.21	

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

ACITY	ity ID	DMSWEBACT	002483022	-				
Activ	ity Start Date Time	05-01-2021	0 9:	00 **				
Activ	ity End Date Time	05-01-2021	D 09:	30				
Activ	ity Type	T52 - Health	Coaching Contact			v ••		
Fami	ily/Whanau Involvement	1 - Yes. Clier	t with family/whān	au		. •		
Activ	ity Setting	OS - Onsite		v ••				
Healt	th Care Worker CPN		mandatory fields lete Activity Ca	ncel				
Act	tivities Select	one for e	diting					
	Activity ID -	Activity Type	Family/Wha Involveme		Health Care Worker CPN	Start Date Time	End Date Time	To Be Deleted
					= 0(2)(a)	A DOMESTIC STREET	THE READ SAFET	
0	DMSWEBACT002483	022 T52	1	OS	s 9(2)(a)	05-01-2021 09:00	05-01-2021 09:30	

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:

Activity ID	DMSWEBACTO	002483022					
Activity Start Date Time	05-01-2021	1 9:00					
Activity End Date Time	05-01-2021	09:30					
Activity Type	T52 - Health C	Coaching Contact					
Family/Whânau Involvement	1 - Yes. Client	t with family/whānau			~		
Activity Setting	OS - Onsite		v) **				
Health Care Worker CPN		andatory fields					
Activities Select	one for ed	liting					
Activity ID	Activity Type	Family/Whanau Involvement	Activity Setting	Health Care Worker CPN	Start Date Time	End Date Time	To Be Deleted
CHICHUED LOTOCOLOG	022 T52	1	OS	s 9(2)(a)	05-01-2021 09:00	05-01-2021 09:30	
O DMSWEBACT002483							

The following warning screen will appear:

Activity ID	DMSWEBACT002483	3022					
Adivity Start Date Time	05-01-2021	09:00					
Adivity End Date Time	05-01-2021	09:30					
Adiivity Type	T52 - Health Coachi	ng Contact			4		
Family/Whanau Involvement	1 - Yes. Client with fa				~		
Activity Setting	OS - Onsite	Confirm D	letion				
Health Care Worker CPN	** indicates mandat			No			
Activities Select	ane for editing	9					
Activities Select		9 Family/Whānau Involvement	Activity	Health Care Worker CPN	Start Date Time	End Date Time	To Be Deleted
	Activity H Type	Family/Whanau				End Date Time 05-01-2021 09:30	





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.

ctivities Select of	ne for editi	ing					
Activity ID	Activity Type	Family/Whanau 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
DMSWEBACT00248300	T52	t	DM		01-05-2021 09:00	01-05-2021 12:00	

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:

	Transfer (199	Services Section					
elerr 4 44	Merral Search Result						
	Referral ID -		NHI Number (HCU ID)	Start Date	End Date	Last Modified Date	
0	DMSWEBREF000002793	7315	s 9(2)(a)	17-08-2009 15:41	(· · · · · · · · · · · · · · · · · · ·	05-11-2009	
0	DMSWEBREF000002832	7315		01-01-2007 11 15		16-11-2009	
	DMSWEBREF000002853	7315		10-10-2009 10 10		01-12-2009	
0	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:

		PR	MHD Programme for the	Integration of Mental F	lealth Data		C
			nical support please call 0800 50			toot	
Administ	My Ender	Augusta-					
lew Referral							
Internal ID Arganezation (D Intern Code IA Numkor (MCU (D) ion Internal Sum Internal Eng Date Internal Eng Date Internal Eng Internal Eng Internal Eng	coccets a 7315 S 9(2 (a)	08 07 10 58 853655078678 and 16 81 10	cs.orgnation sorvice				
ass Monthes Date	Tat 1						
Activity Collection Oc	iection Occ		ementary Consumer Records		Outcome Episade Id	Outcome Tool Type Version	To Be Outstand
	inction Occ		ementary Consumer Records den Collection Occasion Date 20-05-2014 14:00		Outcome Episode Ist	Outcome Tool Type Version	Te De Osteted

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



Collection Occasion Records, Continued

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.

it Modified Date 27-06	-2016 11:10		
Activity Collection	n		riker CPN Outcome Episode Id Oulcome Tool Type Version To Be Deleter
NGOWEBC000000254*	RC15 20-05-2	014 14:00	M1
NGOWEBCO00002540) RC13 15-05-2	014 10:00	M1
records found, displayin	ng 2 records, from 1 to 2. Page 1	of 1	
Collection Occasion ID Reason For Collection Collection Occasion Date dealthcare Worker CPN Dutcome Tool Type Version Adde of Administration Completion Date To Be Deleted	MA01 - Clinical rating completed folic assessment 20-05-2014 14:00 Cancel	Outcome Episode Profocol Version Focus of Care Collection Status wing clinical	d 0140 - Version 1.4 FC11 - Active treatment CS02 - Not completed due to temporary contraindication (applies only to sett-report measures)
	item Co	ode	Item Value
01 - Alcohol use in the pa	st four weeks - days of use		8 - 8 days
02 - Alcohol use in the pa	st four weeks - standard drinks per da	ay	5 - 5 standard drinks per day
03 - Drug use in the past	four weeks - days' use of Cannabis		0 - 0 days
04 - Drug use in the past	four weeks - days' use of Amphetamir	ne-type stimulants	1 - 1 day
05 - Drug use in the past	four weeks - days' use of Opioids		2 - 2 days
06 - Drug use in the past	four weeks - days' use of Sedatives/tr	anquilisers	0 - 0 days
07a - Drug use in the pas	t four weeks - days' use of Other Drug	gs 1	2 - 2 days
07b - The drug used to an	nswer Item 07a		01 - Ecstasy
08 - Cigarettes - Average	cigarettes smoked per day		47 - 47 cigarettes
09a - Indicator of main su	ostance of concern 1		A – Alcohol
10 - Injected Drug Use in	the past four weeks - number of days		0 - 0 days
11 - Injecting equipment s	haring - Yes or No		X - Not Applicable
12 - Frequency of genera	I physical health causing problems in	daily life	4 - Three or four times a week

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



3.14 Adding New Collection Occasion Records

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:

		PRMHD Programme for the Integration of Menta	al Health Data	0
		For sectional support please call 0000 505 125. For all other eng		
-Ballenate -	Hy Louis Recursio			
dil Referral				
eternal ICI Inganisation IDI	NGOWEBREF00000	0660		1
win Code	7315			
All Rumber (HCU (D))	s 9(2)	1 ++		- 11
**	(a)			
tate of Exter	(a)	0 ···		- 11
leferral Mart Dale	20-01-2008	E 107 10		- 11
Lefternet Kind Dute		8		
Infine all trade	NA - Needs assess	ment and co-ordination tervice 🛛 👻 +1		- 11
lefenal Tu		2		- 11
Affin a Ent Cade	T# indicates manda	۳. ۲		
		atory finida		
	Save Carcel	Kulawil for Processing Deinte Referral		
	and the second sec			_
Activer Colle	and the second sec			-
Add Collection	save Carcel	Bulanti for Processing Debrie Referral		
	save Carcel	Bulanti for Processing Debrie Referral	ee al	
Add Collection	Carcel Carcel Content	Sugnationertary Consumer Records		
Add Collection	ection Occasion n Occasion Current pa	Suptementary Consumer Records		
Add Collection	ection Occasion n Occasion Current pa	Suptementary Consumer Records Outcome Epise Protocol Version	*	
Add Collection	ection Occasion n Occasion Current pa	Suptementary Consumer Records Outcome Epise Protocol Version	*	
Add Collection Colection Occasion Anatom For Collectio Healthcare Worker C Outcome Task Type"	Carcel	Sudmit for Processing Denter Referral Sudmit for Processing OutCome Epsil Cutome Epsil Focus of Case V see Columnation Inter-	* · · ·	
Add Collection Colection Occasion Reason for Collection resisticare Worker C Guicome Tasil Trav- likog of Astronomics	Carcel	Sudmit for Processing Denter Referral Sudmit for Processing Dutotime Epsil Cutotime Epsil Protocol Versil Versil Columnation Columnation Versil Columnation Versil Columnation Versil Columnation Versil Columnation Versil Versil Columnation Versil Versil Columnation Versil Versil Versil Versil Columnation Versil Versil Columnation Versil Versil Columnation Versil Columnatio	* · · ·	
Add Collection Colection Occasion Reason For Collection residing the Worker Collection Collection Fault Type"	Eden Carcel Carc	Sudmit for Processing Denter Referral Sudmit for Processing Outcome Epsil Cutome Epsil Focus of Case Column Sum Tana	* · · ·	





Adding New Collection Occasion Records, Continued

Enter all the details in the Add Collection Occasion form

Activity Collection	Occasion Supplementary Consumer Records			
Add Collection Occ	asion			
			Outcome Episode Id	
Collection Occasion Date	30-05-2016		Protocol Version	0140 - Version 1.4
Reason For Collection	RC17 - Treatment review - 12 weeks V	**	Focus of Care	FC11 - Active treatment
Healthcare Worker CPN				
Outcome Tool Type Version	M1 - ADOM 💙 *	* *	Collection Status	CS01 - Complete or partially complete V **
Mode of Administration	MA03 - Self-report completed by tangata whatora/con 🗸 *	**		
Completion Date	30-05-2016			
	** indicates mandatory fields			
	Save Clear Cancel			

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.

Item Code	Item Value	
I - Alcohol use in the past four weeks - days of use	4 - 4 days	•
2 - Alcohol use in the past four weeks - standard drinks per day	3 - 3 standard drinks per day	•
3 - Drug use in the past four weeks - days' use of Cannabis	1 - 1 day	
4 - Drug use in the past four weeks - days' use of Amphetamine-type stimulants	2 - 2 days	•
5 - Drug use in the past four weeks - days' use of Opioids	2 - 2 days	G
6 - Drug use in the past four weeks - days' use of Sedatives/tranquilisers	1 - 1 day	•
7a - Drug use in the past four weeks - days' use of Other Drugs 1	2 - 2 days	•
7b - The drug used to answer Item 07a	01 - Ecstasy	-
7c - Drug use in the past four weeks - days' use of Other Drugs 2	3 - 3 days	Ŧ
7d - The drug used to answer Item 07c	03 - Solvents	•
7e - Drug use in the past four weeks - days' use of Other Drugs 3	2 - 2 days	
7f - The drug used to answer item 07e	04 - GHB	•
8 - Cigarettes - Average cigarettes smoked per day	12 - 12 cigarettes	
9a - Indicator of main substance of concern 1	B - Cannabis	

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.

ON	GDWEBCO00002560	RC15	30-05-2014 14:00		M1	
N	GOWEBC000002541	RC15	20-05-2014 14:00		M1	
N	GOWEBC0000002540	RC13	15-05-2014 10:00		M1	

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

Add Collection Occ	asion	1	1	
collection Occasion Date	30-05-2016 📑 14.00 **	Outcome Episode Id Protocol Version	0140 - Version 1.4	~
leason For Collection lealthcare Worker CPN	RC17 - Treatment review - 12 weeks	Focus of Care	FC11 - Active treatment	~
outcome Tool Type Version lode of Administration	M1-ADDM V xxx MA03 - Self-report completed by tangata whatora/cor V ***	Collection Status	Field Collection Status is required	* **

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:

	For technical support please call DBIII 1011 1211. For all other enguines please contact Support	
Automatica, Ma	Arrow Researches	
dit Referral		
	SCWE9/12 F000002660	
eam Code	7315	
NE Number (HOL/10)	s 9(2)(a)	
new of them		
eterral Start Date.	20-01-2008 20710	
amerral Enit Date	8	
eterral From	M - Needs assessment and co-ordination service 🐳 💀	
uT lanate	NA : Needs assessment and co-ordination service v	
erenal End Code	×	
	 indicates manifatory fields 	
	Save Carios Tubrit to Processing Only Referat	



Adding New Collection Occasion Records, Continued

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

Referral Accepted	by PRIMHD	
Referral NGOWEBR	EF000002660 has been successfully submitted and accepted by the PRIMHD system.	
Referral Details		
Referral ID	NGOWEBREF000002660	1
Organisation ID	G00059-E	

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

Referral Rejected	y PRIMHD	
CRETERIAL NGOWEBRE	F000000331 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:

		incel incel				
	al Selech Resul					
	Referral ID		NHI Number (HEU ID)	Start Date	End Date	Last Modified Date
0	DMSWEBREF000002793	7315	s 9(2)(a)	17-08-2009 15-41		05-11-2009
0	DMSWEBREF000002832	7315		01-01-2007 11 18		16-11-2009
	DMSWEBREF000002853	7315		10-10-2009 10 10		01-12-2009
0	DMSWEBREF000002854	7315		10-10-2006 15:41		01-12-2009
	NGOWEBREF000002600	7315		10-10-2008 15 15	18-02-2009 20:45	27-07-2009
	1/GOWEBREF000002660	P315		20-01-2008 07 10		07-08-2009
		and in				

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):

Collection Occasion ID	Reason For Collection	Collection Occasion Date	Healthcare Worker CPN	Outcome Episode Id	Outcome Tool Type Version	To Be Deleted
NGOWEBCO00002560	RC15	30-05-2014 14:00			M1	
NGOWEBCO00002541	RC15	20-05-2014 14:00			M1	
NGOWEBCO00002540	RC13	15-05-2014 10:00			M1	

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

Activity Collection				
Collection Occasion (D	NGDWERC0000002541 2D-05-2014 [14:00 ** RC15 - Assessment only • ••	Collection Status	0140 - Version 1.4 FC11 - Active treatment CS02 - Not completed due to temporary contraindicat	
1	Item Code		Item Value	
01 - Alcohol use in the pas	st four weeks - days of use	8 - 8 days		v
02 - Alcohol use in the pas	st tour weeks - standard drinks per day	5 - 5 standard dr	inks per day	~
03 - Drug use in the past f	our weeks - days' use of Cannabis	0 - 0 days		~
04 - Develuce in the past (our weeks - days' use of Amphetamine-type stimulants	1 - 1 day		~

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

Activity Collection				
Collection Occasion ID	NGOWEBC0000002541	Outcome Episode Id		
Collection Occasion Date	20-05-2014	Protocol Version	0140 - Version 1.4	~
leason For Collection	RC15 - Assessment only 💙 *	Focus of Care	FC11 - Active treatment	~
ealthcare Worker CPN				
outcome Tool Type Version	M1 - ADOM 🗸 *	Collection Status	CS02 - Not completed due to tempora	ry contraindicat 🗸 🔹
ode of Administration	MA01 - Clinical rating completed following clinical ass \checkmark	•		
completion Date	20-05-2014 🔯 14:00 **			
	** indicates mandatory fields Save Delete Collection Occasion Calicel	1		
	Item Code		Item Value	
01 - Alcohol use in the pas	t four weeks - days of use	8 - 8 days		~
02 - Alcohol use in the pas	it four weeks - standard drinks per day	5 - 5 standard dr	inks per day	~
03 - Drug use in the past f	our weeks - days' use of Cannabis	0 - 0 days		~
04 Drug use in the past f	our weeks - days' use of Amphetamine-type stimulants	1 - 1 day		~

The following warning screen will appear:

	NGOWEBCO00002541		Outcome Episode Id		
collection Occasion Date	20-05-2014	**	Protocol Version	0140 - Version 1.4	~
leason For Collection	RC15 - Assessment only	**	Focus of Care	FC11 - Active treatment	~
iealthcare Worker CPN					
		Confirm Deletion			
outcome Tool Type Versio	M1 - ADOM	ADOM Are you sure you wish Collection Occasion red		CS02 - Not completed due to temporary contraindicat	v *
lode of Administration	MA01 - Clinical rating completed foli				
ompletion Date	20-05-2014	Yes	No		
	** indicates mandatory fields				
	Save Delete Collection Oc	casion Cancel			
	Item Code			Item Value	
					~
01 - Alcohol use in the p	ast four weeks - days of use		8 - 8 days		~
	ast four weeks - days of use ast four weeks - standard drinks per da	y.	8 - 8 days	inks per day	~



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.

b l	lection Occasions	Select one fo	rediting				
	Collection Occasion ID	Reason For Collection	Collection Occasion Date	Healthcare Worker CPN	Outcome Episode Id	Outcome Tool Type Version	To Be Deleted
0	NGOWEBCO00002560	RC15	30-05-2014 14:00		· · · · · · · · · · · · · · · · · · ·	M1	Yes
	NGOWEBCO00002541	RC15	20-05-2014 14:00			M1	
	NGOWEBCO00002540	RC13	15-05-2014 10:00			M1	

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/quide-to-primhd-supplementary-consumer-recordcollection-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:

iterra	a Search Result					
	1 2 3 4 5 MM					
	Referral ID		NHI Number (HOU ID)	Start Date	End Date	Last Modified Date
0	DMSWEBREF000002793	7315	s 9(2)(a)	17-08-2009 15:41	P	05-11-2009
ō.	DMSWEBREF000002832	7315		01-01-2007 11 15		15-11-2009
	DMSWEBREF000002853	7315		10-10-2009 10:10		01-12-2009
0	DMSWEBREF000002854	7515		10-10-2008 15.41		01-12-2009
	NGOWEBREF000002600	7515		10-10-2008 15 15	18-02-2009 20 45	27-07-2009
	NGOWEBREF000002660	7315		20-01-2005 07:10		07-05-2009



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:

		-		gration of Mental Health I 5. For all other enquires plea			
Arhibe.	Ny Treat Avenue						
few Referral							
energia (C) Taper Licker (C) Tape (Licker An of the Case and C and Case and C and Case and C and Case and C and Case and Case And Case And Case And Case And Case And Case And Case And Case	PLOADWAINER FOODOCCUME CONTROL HE 200 S 9(2) 20-21-2006 OF 10 NA - Netto gasestation and co-o 27-66-2016 12 13						
Autory Cole		Consumer Re	Wemmu Plan	Accession lines.	Experiment Status	Lincole Sale	To the Designed
and the second second	entary Consumer Record ED	Construction Frank	Constant Property	the second second	Contraction of the second	Contraction of the local division of the loc	
Bupplem MGOWEBICORD	00001018	15-03-2016	1.4	1	2	1	

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.

ctivity Collection Occasion Supple	mentary Consumer Re	cords				
Supplementary Consumer Record ID	Collection Date	Wellness Plan	Accommodation Status	Employment Status	Education Status	To Be Deleted
NGOWEBSCR000001018	18-03-2016		2	2	2	
NGOWEBSCR000001017	18-06-2016	1	1	1	2	
applementary Consumer Record IDNGOWEBSCD Offection Date 18-03-2016 (effiness Plan 1- Yes ecommodation Status 2 - Supported mployment Status 2 - In paid em ducation Status 2 - No		30 hours per veek				

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 <u>Save</u> 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:

	PRIMHD Programmine for the Integration of Mensual Health Data	O ;
	File lectrical support please call 0800 305 125. First all other exportes please currierd Support	
Advent.	Ny Arnie Kaspelle J	
Ldit Referral		
National ID Preparentition 30 Theorie Code International (Code States and Darts States and Darts States and Darts States and Theory National The National The	NCOVERING PRODUCTION TOTOLOGIA Tarta S 9(2) (a) B ** B	
	non-Occasion Supplementary Consumer Records	
Constan Date		
Westwoor Plan		
Employment Signal		
Enciden status		
	** Indicates mendatory feads (See) (See) (See)	



Adding New Supplementary Consumer Records, Continued

Enter all the details in the Add Supplementary Consumer Record form

	an Occasion Supplementary Consumer Records		
Collection Date	19-06-2016		
Wellness Plan	1 - Yes	¥	**
Accommodation Status	1 = Independent.	v	**
Employment Status	2 - In paid employment for 1 to less than 30 hours per week	v	**
Education Status	2 110	¥	
(indicates mandatory fields Save Clear Cancel		

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.

Supplementary Consumer Record ID	Collection Date	Weilness Plan	Accommodation Status	Employment Status	Education Status	To Be Deleted
O NGOV/EBSCR000001019	19-06-2016	1	t	2	2	
NGOWEBSCR000001018	18-03-2016	1	2	2	2	
NGOWEBSCR000001017	18-06-2016	i	1	1	2	

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

Add Supplemen	tary Consumer Record		
Collection Date	19-06-2016		
Veliness Plan	1-Yes	v	**
ccommodation Status	1 - Independent	~	
mployment Status	2 - In paid employment for 1 to less than 30 hours per week	¥	**
ducation Status		×	an l
opening singe	Field Education Status is required.		
	Save Clear Cancel		

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



Adding New Supplementary Consumer Records, continued

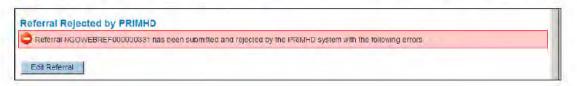
When you are ready to submit the data, click on the **Submit for Processing** button higher up in the referral section:

	PROMHD Programmine for the integration of Mental Health Factor	0
	For technical support peake call (800) 505 125. You all other expuses peaker scened Support	
interation into	A Dist Access.	
fullis Referred		
Pergemadikm/ID 0	GCV#184EF100003600 10055-8	
	7915 **	
	s 9(2)	
-	(a) ***	
Dam (A Dist)	13.00	
	20-01-2008 20-01	
California Excel Date	0	
Enternal Friend	WA - Needs assessment and to-ordination service v 👘	
Comment of the local	3	
	** initialities naminary testin take Uncel Nami for Processing Speer Internal	
	taxe and tuber to Pozetarg gree letters	

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

Referral Accep	ted by PRIMHD
Referral NGOW	/EBREF000002660 has been successfully submitted and accepted by the PRIMHD system.
Referral Details	6 A.
Referral ID Organisation ID	NGOWEBREF000002660 G00059-E

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:

		and there				
eteri	ni Search Result					
	Referral ID	Team Code	NHI Number (HOU ID)	Start Date	End Date	Last Modified Date
0	DMSWEBREF000002793	7315	s 9(2)(a)	17-08-2009 15 41		05-11-2009
0	DMSWEBREF000002832	7315		01-01-2007 11 15		16-11-2009
	DMSWEBREF000002853	7315		10-10-2009 10 10		01-12-2009
0	DMSWEBREF000002854	7318		10-10-2008 15 41		01-12-2009
	NGOWEBREP000002600	7315		10-10-2008 15 15	16-02-2009 20-45	27-07-2009
	NGOWEBREF000002660	7315		20-01-2008 07 10		07-08-2009
				the second second second	and the second second	

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):

Supplementary Consumer Record to	Cullection Date	Wellness Plan	Accommodation Status	Employment Status	Education Status	To Be Deleted
NGOWEBSCR000001019	19-06-2016	4	1	2	2	
NGOWEBSCR000001018	18-03-2016	1	2	2	2	
NGOWEBSCR000001017	18-06-2016	1	1	1	2	

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

Activity Collection Occas	on Supplement	ary Consumer Reco	rds				
Edit Supplementary C	onsumer Record						
Supplementary Consumer Recon	ID NGOWEBSCR0000	01019					
Collection Date	19-06-2016						
Wellness Plan	1 - Yes			¥ 14			
Accommodation Status	1 - Independent						
Employment Status	2 - In paid employ	nent for 1 to less than 3	hours perweek	¥			
Education Status	2 - No			¥			
	** indicates mand	atory fields					
	Save	Delete Supplementary	Consumer Record	Cancel			
Supplementary Consu	mer Records	Select one for e	diting				
Supplementary Co		Collection Date	Wellness Plan	Accommodation Status	Employment Status	Education Status	To Be Delete
Supplementary Ca		19-06-2016	1	1	2	2	in the best of
O NGOWEBSCR000001019		18-03-2016	1	2	2		
NGOWEBSCR000001019 NGOWEBSCR000001018							

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

Activity Collection Occa Edit Supplementary		ary Consumer Reco	erds.				
Supplementary Consumer Reco	ord ID NGOWEBSCR0000	01019					
Collection Date	19-06-2016						
Wellness Plan	1-Yes			¥			
Accommodation Status	1 - Independent			¥			
Employment Status	2 - In paid employ	nent for 1 to less than 30	0 hours per week	V			
Education Status	2 - No			· · ·			
	** indicates mand Save	atory fields Delete Supplementary (Consumer Record	Gancel			
Supplementary Cons			diting				
	Consumer Record ID	Collection Date	Wellness Plan	Accommodation Status	Employment Status	Education Status	To Be Deleted
O NGOWEBSCR0000010*		19-06-2016	1	1	2	2	
NGOWEBSCR0000010		18-03-2016	1	2	2	2	
NGOWEBSCR0000010*	17	18-06-2016	1	1	5	2	

The following warning screen will appear:

		*				
** indicates mandatory field		Colors Dataset				
save Cancer 3		and the second se				_
tion Occasion Supple						
entary Consumer Re						
	and the second se	TCS	NO			
1-Yes			N			
as 1 - Independ	lent		×			
		a 30 hours per week				
and the second se	mandatory fields					
Save		ry Consumer Record	Cancel			
y Consumer Records	s Select one for	editing				
nentary Consumer Record I	D Collection Dat	to Wellness Plan	Accommodation Status	Employment Status	Education Status	To Be Deleted
2000001019	19-06-2016	14	1	2	2	
	19-06-2016 18-03-2016	11	1 2	2 2	2 2	
	save Cancel s ction Occasion Supplex entary Consumer Rec umer Record Divido/VEBSCR 19-06-2010 1 - Ycs us 1 - Independ 2 - In paid en 2 - No 1 - No	Save Cancel Submit for Processing ction Occasion Supplementary Consumer + entary Consumer Record umer Record INGOVERSCR000001019 19-06-2016 = ++ 1 - Tes 1 - Independent 2 - In paid employment for 1 to less than 2 - No = Indicates mandatory fields Save Creater Supplementary Y Consumer Records Select one for	Save Cancel Submit for Processing Delate Retentil ction Occasion Supplementary Consumert Are you sure you will supplementary Consumert Are you sure you will supplementary Consumert entary Consumer Record 19-06-2016 9 + 1 1-705 1 - independent 2 - in paid employment for 1 to less than 30 hours per week 2 - N0 ** Indecess mandatiny fields Save Delate Supplementary Consumer Record ry Consumer Records Select one for editing Save Delate Supplementary Consumer Record	Save Cancel Submit for Processing Delete Referrat ction Occasion Supplementary Consumer Confirm Deletion entary Consumer Record Yes No umer Record Yes No 19-06-2016 #+ Independent 1- Yes No Independent 2- In paid employment for 1 to less than 30 hours per week Independent 2- No Independent Independent Save Center Center	Save Cancel Submit for Processing Delete Reternal ction Oscasion Supplementary Consumer Are you sure you wish to delete this Supplementary Consumer record? entary Consumer Record Yes No umer Record Yes No umer Record *** No 1 - Mocpendent *** *** 2 - In paid employment for 1 to less than 30 hours per week *** 2 - No *** *** Save Center Supplementary Consumer Record Cancel	Save Cancel Submit for Processing Delete Reternal ction Oscasion Supplementary Consumer Are you sure you wish to delete this entary Consumer Record Yes No umer Record Yes No use 1-mdcpendent *** 1-mdcpendent *** *** 2-lip aid employment for 1 to less than 30 hours per week *** *** Indicates nanoabity fields *** Save Celete Supplementary Consumer Record Cancel





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.

p	plementary Consumer Records	Select one fo	or editing				_
	Supplementary Consumer Record ID	Collection Date	Wellness Plan	Accommodation Status	Employment Status	Education Status	To Be Deleted
>	NGOWEBSCR000001019	19-06-2016	1	1	2	2	Yes
	NGOWEBSCR000001018	18-03-2016	4	2	2	2	
	NGOWEBSCR000001017	18-06-2016	1	1	1	2	

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.

	P	MHD	rogramme for the	e Integration of Mental Health Data	
	For	echnical support (please call 0800 60	05 126. For all other erguines please contact Support	
Refenals My Sm	r Records				
	DYNAM D				
Referral Rejected by I	RIMHD				
		itted and rejecte	ed by the PRIMH	D system with the following errors.	
Edit Referral		itted and reject	ed by the PRIMH	D system with the following errors.	
Beferral NGOWEBREFOR	0002660 has been subm	itted and rejecte	ed by the PRIMH	D system with the following errors. Error Message	

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:

Try Error Records - Hicrosoft Interne	et Explorer provided by Plinistry of Health		- 8 ×
) . Le		🔳 🏭 🤧 😹 Gaogle	P -
e Edit View Favorites Tools Ha	lp		Links ^x
🔹 🎂 My Error Records			Page + 🚽 Tools + 🏾
Referrate My Error My	r technical support please call 0800 505 125. For a		
🕻 📢 1 2 🖪 4 5 🕨	F# #1		
🕻 📢 🐴 1 2 🔄 4 5 🕨	Record ID	NHI Number(HCU_JD))
		NHI Number(HCU_ID))
Organisation ID	Record ID		>
Organisation ID G00059-E	Record ID NGOWEBREF000002660)

Any records that have resulted in an error will be displayed on this screen.



My Error Records, Continued

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.

		_		for the integration of Mental Intel 10 121 For al other exp		p.	C
Anistan (1	tree Assessed						
Referral Sulminia	in trous. P	CINING					
Fintio	di la	Error Ke	lerence Emir	Tella	Eros	Menuage	
NODWERACTOODO	2943	8/8-952-15	Provakti Die	ia The History Start (Lale	Time in dection the Referral	Start Date Tenir	
lase of Bark Industry ISail Case United Inst Date Industry Trans Industry Trans Industry Stat Case	S 9(2) (a) and or a NA Mercia access 27.46-2014 12 H	nest and to order					
Activities	See Distance	Supposedary	Consultant Bat India				
	ty ID -	Activity Type	Adwity Setting	Health Gare Intokar Gifts	.5tort Date Tene	ENd Date Time	
Active							To be Crethed
NGOWEBACTOO		742	CHI		18-06-2016 16:00	19-06-2016 nJ.36	To the Contrast
and the second second second second	002942	742 725 716	CHI CHI CHI		18-06-2016 16:00 21-07-2008 18:15 16-07-2008 18:15	10-06-2018 mil.30 21-07-2008 20 m 19-07-2008 21 21	Til Be Colded

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 <u>not</u> 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.

ors ating to	Error	Description
I Details	RM-P22-06	The Event HCU ID supplied in the HC record is not valid in the NHI Database
		The Event HCU ID is the client's NHI number. The HC record is the Healthcare User record.
	Hints for correcting	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.
		The Event HCU ID is the client's NHI number. The HC Record is the Healthcare User Record.
	Hints for correcting	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.
ors	Error	Description
ating to tivity	RM-P52-20	The Activity Start Date/Time is before 1 July 2008.
tes	Hints for correcting	Only activity on or after 1 July 2008 should be recorded in PRIMHD. If the activity is <i>before</i> 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.



Common Error Messages when Submitting Records, continued

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 <i>End Time</i> is after the <i>Start Time</i> .

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 <i>Time</i> is on or after the Referral Start <i>Time</i> .

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 <i>Time</i> is on or after the Activity End <i>Time</i> .
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	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.
correcting	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:

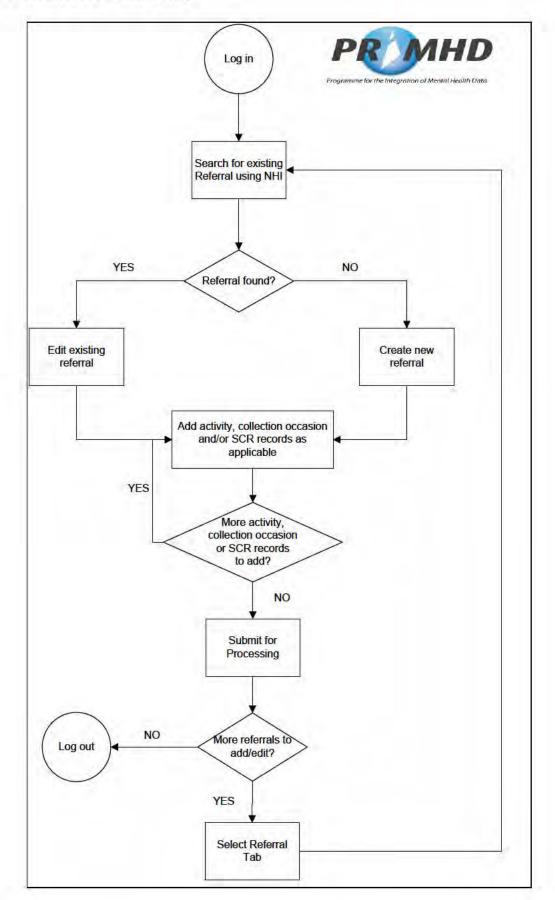


Once logged out you will be presented with the following screen:

(a) - (a)		- 2	++ ×	
😪 🍪 🌈 User Log Out			🏠 ★ 🖾 ★ 🖶 ★ 🔂 <u>P</u> age	▼ ② Tools ▼ ② ▼ [≫]
PRMH	DProgramme for the Integration of	f Mental Health Data		-
	l support please call 0800 505 1		please contact <u>Support</u>	
	l support please call 0800 505 1		please contact <u>Support</u>	



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.



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.

Activity Start Date Time	13-01-2021	10:15	**	
Activity End Date Time	13-01-2021	11:00		
Activity Type				v **
Family/Whānau Involvemen	nt			~
Activity Setting	v **			
Health Care Worker CPN				
	** indicates mand	atory fields		
	Save Clear	Cancel		



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	Proprint Programme for the Intel For technical support please call 0800 505 124 For technical support please call 0800 505 124 The error message is: Transport error, 404 Error, Not Found The error stack trace is: org apache axis2 transport nttp. HTTPSender send/VaPos(HTTPSender Java 25 at org apache axis2 transport nttp. HTTPSender send/VaPos(HTTPSender Java 190) at org apache axis2 transport nttp. HTTPSender send/VaPos(HTTPSender Java 190) at org apache axis2 transport nttp. HTTPSender send/VaPos(HTTPSender Java 190) at org apache axis2 transport nttp. HTTPSender send/VaPos(HTTPSender Java 190) at org apache axis2 transport http://tocsportsender.ustb.licecapabilities 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.	



Trouble Shooting, Continued

Problem	Suggested resolution
Stack Trace Error	Error PRIMHD The error message is:
	The error stack trace is: java lang llegalargumentException at java, faces component. Selectifemsiterator next(Selectifemsiterator java.146) at java, faces component UlSelectione matchValle(UlSelectione java.146) at java, faces component UlSelectione validatevalue(UlSelectione java.146) at java, faces component Ulselectione validatevalue(UlSelectione java.146) at java, faces component Ulipeticatevalue validatevalue(Selectione java.146) at java, faces component Ulipeticatevalue validatevalue(Selectione java.147) at java, faces component Ulipeticatevalue validatevalue(Selectione java.146) at java, faces component Ulipeticatevalue validatevalue(Selectione java.146) at java, faces component UlicomponentBase process/validators(UlicomponentBase java.946) at java, faces component UlicomponentBase process/validators(UlicomponentBase java.946) at com lecsoft faces component panetlabset PanetTabSet appl/Phase(PanetTabSet java.167) at com lecsoft faces component javanetBase process/validators(UlcomponentBase java.946) at com lecsoft faces component javanetBase PanetTabSet appl/Phase(PanetTabSet java.167) at java, faces component javanetBase process/validators(UlcomponentBase java.946) at java, faces component javanetBase process/validators(UlcomponentBase java.946) at java, faces component UlcomponentBase java.946) at jav
	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	Referrals Team Legal My Error Records Reconcliation Reconcliation No Response from PRIMHD Image: Reconcliation Reconcliation Reconcliation Edit Referral Discharge Pending Edit Referral Discharge Pending Reconcliation Reconcliation
	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 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". / "bed night" is a bed occupied at midnight. If a bed is held for the recipient , but unoccupied, it is to be given an <i>activity type</i> 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.



Glossary, Continued

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")		
PRIMHD Referral	 The Referral, also known as the Referral-Discharge, can be a: Request for management of a problem or provision of a service, e.g. a Request for an investigation, intervention or treatment; 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: the consumer or their family, whānau, or another significant person, or from one team to another. In this case the requesting team may or may not transfer responsibility 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. 		
	identifies a Referral Discharge episode for a consumer and is the primary key tha 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 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.



Data Fieldnames, Continued

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

Fieldnames

Terminology

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	Definition: The date and time the activity ended		
Time	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	Definition: The data and time the activity started		
Activity Start Date Time	Definition: The date and time the activity started		
Date Time	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
12 mar 10 mar 10 m	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:
	 It is not possible to submit more than one SCR record with the same collection date on a referral.
Collection Occasion Date	Definition: The date and time the collection occasion data was collected
Time	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
	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	Definition: The date and time the collection occasion was completed
Time	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:
	 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:
	 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/ whanau 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	
	 When submitted to PRIMHD: The NHI number must be registered in the NHI system 	
	 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:	
	 The user must enter the correct value NHI Numbers can be obtained from 0800 855 151 	
	 NHI Numbers can be obtained from 0800 855 151 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
	 It may be helpful for the NGO to store this key with their records
Referral Start	Definition: The date (and time) the referral started
Date Time	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 <i>Referral</i> End Code and the <i>Referral End Dat</i> e 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.



Supplementa	Definition: A unique identifier that identifies a single Supplementary
ry Consumer	Consumer Record for the consumer . This uniqueness applies to all
Record ID	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	Definition: A "yes" in this field shows this activity will be deleted when
Deleted	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:
	 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	Jul 2021
	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.	
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