TOITŪ TAKATA FORM

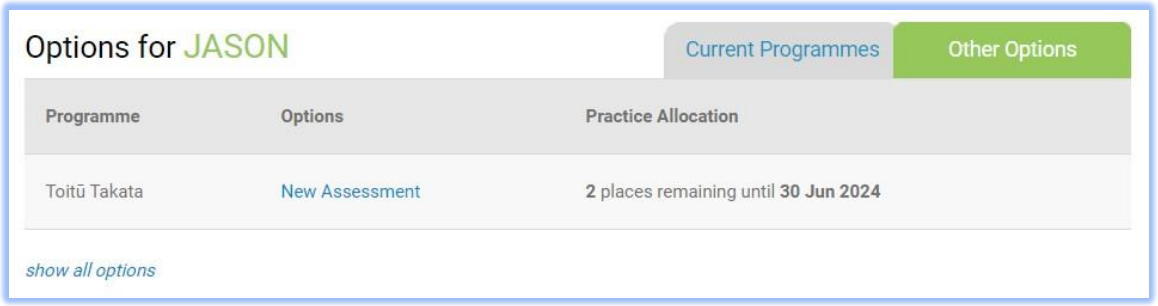
USER GUIDE

WEB PORTAL:

Menus:

- Other Options

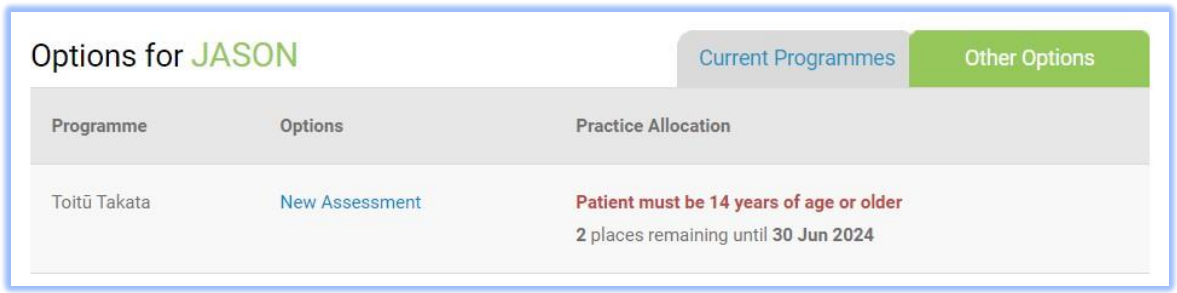
The programme is available through the 'Other Options' menu. This menu section also shows allocation available to the practice.



If not allocations are available, a warning message will appear. The assessment can still be completed – if funded, the assessment will be rejected; if unfunded, the assessment will be accepted.

If the patient is under 14 years of age, the programme will not show for the patient.

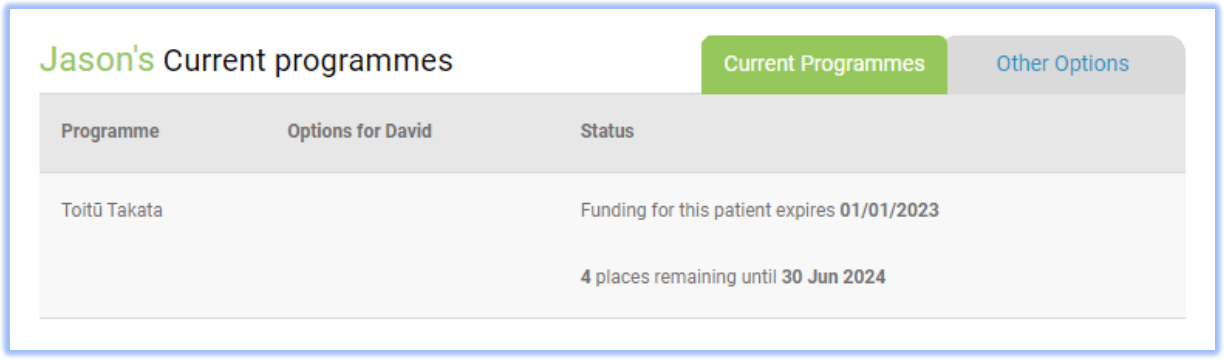
This programme can be accessed using the 'show all options' link. A warning message will be displayed regarding the patient's age, and the assessment will be rejected if submitted.



- Current Programmes

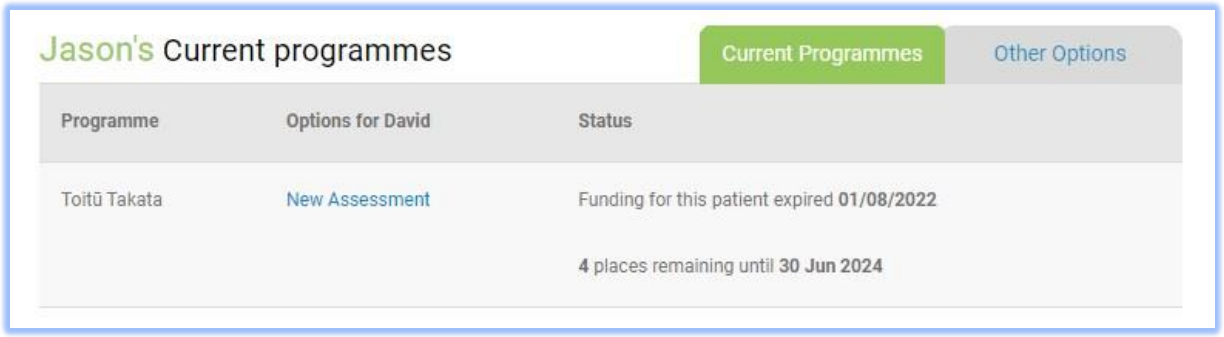
If the patient had an assessment in the last 18 months, the programme summary will appear in the 'Current Programmes' menu.

The section will show the funding expiration date for the patient, and the current allocation for the practice.



If the programme is active (performed in the last 12 months), the link for a new assessment will be hidden (but can be revealed using the 'show all options' link).

Once the patients funding has expired, the link for a new assessment will automatically appear in the menu section.



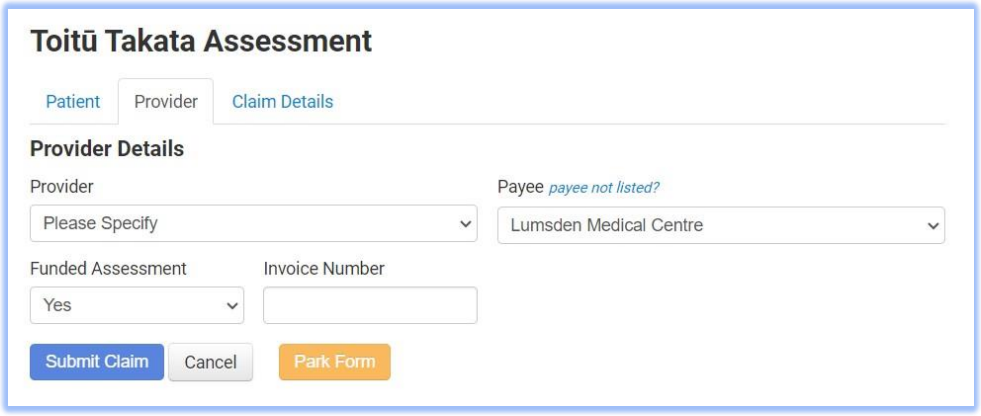
Form:

- Provider tab

The ‘Funded Assessment’ flag is located on this tab.

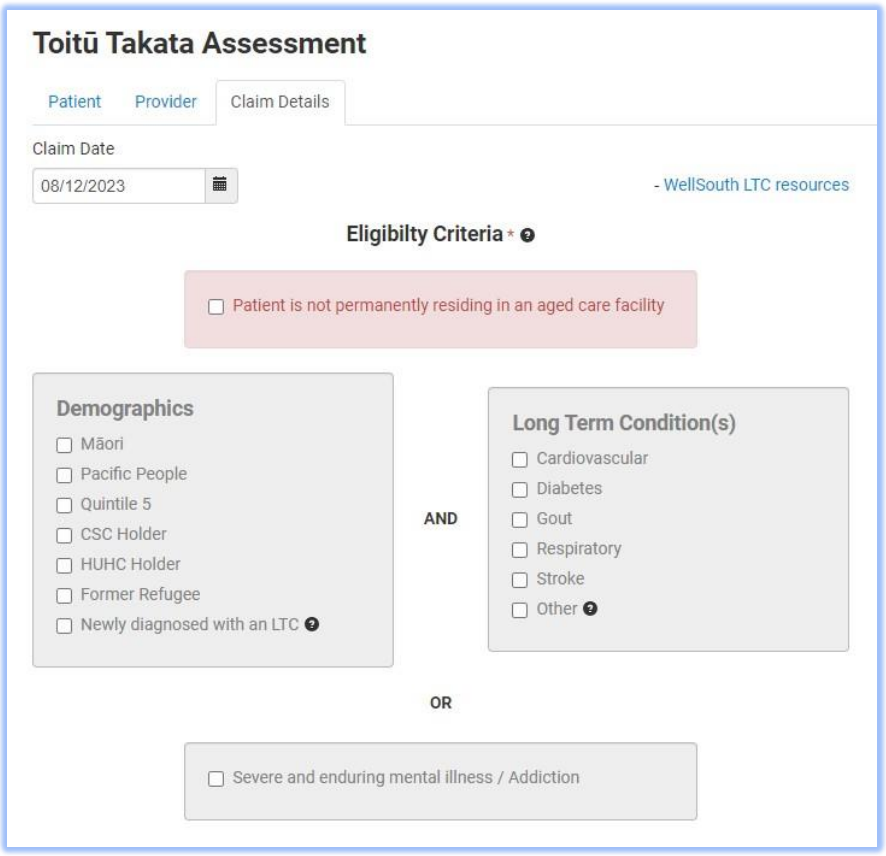
If set to ‘Yes’, all funding business rules will apply (allocations) and an invoice will be raised in a PMS.

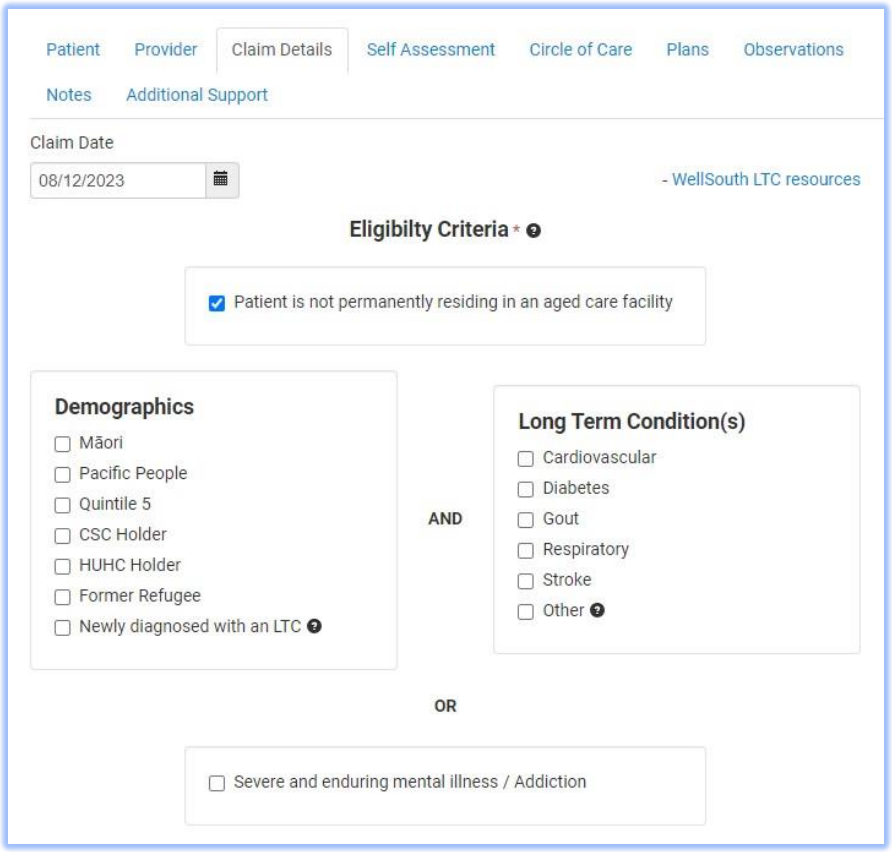
If set to ‘No’, funding business rules will not apply and no invoice will be raised.



- Claim Details tab

The form is ‘locked down’ by default – all extra tabs will be hidden, and no eligibility criteria can be changed. To ‘unlock’ the form, the ‘Patient is not permanently residing in an aged care facility’ check must be ticked.





PLEASE NOTE: the Demographics, Long-term conditions, and 'Severe and enduring mental illness/ Addiction' checkboxes will be automatically populated for a patient when using a PMS. However, this information should be vetted and updated if incorrect.

Ticking any of the 'Long Term Conditions' checkboxes, and the 'Severe and enduring mental illness/ Addiction' checkbox reveal 1 or more related tabs.

Cardiovascular:
- *Cardiovacular/Stroke* tab

Diabetes:
- *Diabetes* tab
- *Cardiovacular/Stroke* tab

Gout:
- *Gout* tab

Respiratory:
- *Respiratory* tab

Stroke:
- *Cardiovacular/Stroke* tab

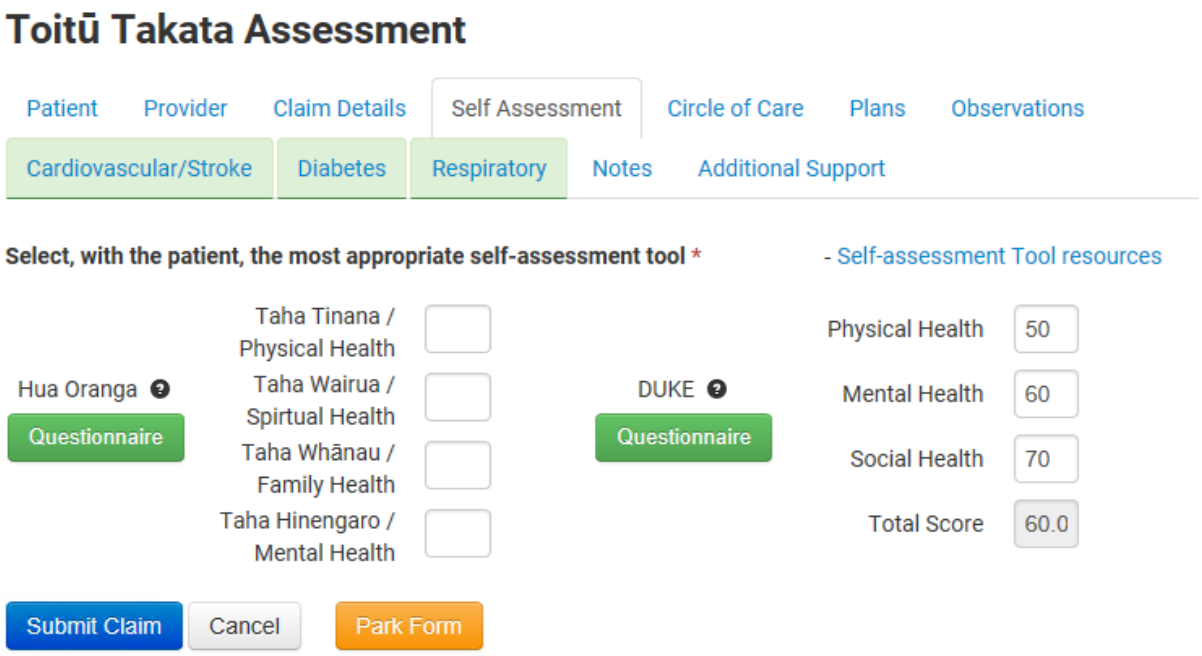
Other:
- *Other LTC* tab

Severe and enduring mental illness/ Addiction:
- *Mental Illness/Addiction* tab

Self Assessment Tab

Choose one self assessment to complete with the patient.

Each questionnaire is presented in a modal window and is revealed when clicking the appropriate green questionnaire button.



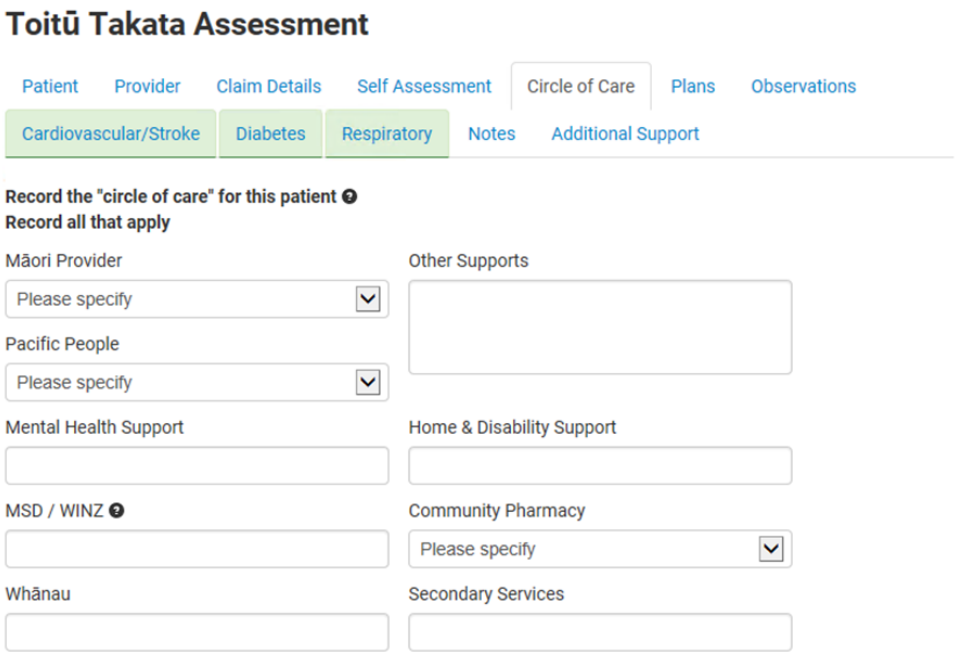
Once completed and saved, the appropriate value(s) will be updated in the form.

NOTE: These fields can also be manually updated without using the questionnaires.

NOTE: The Duke and Hua Oranga assessment are only validated for those over the age of 18yrs. If your patient is under 18yrs of age then these assessments will 'grey out' and will not be required to complete the form.

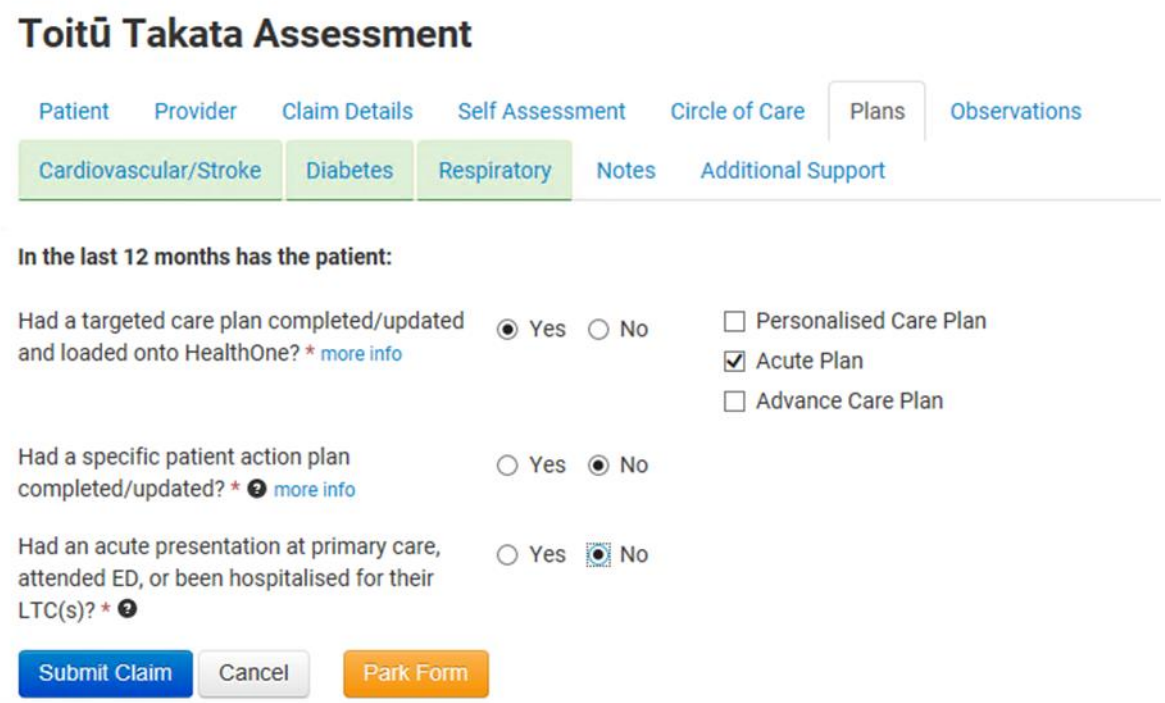
Circle of Care tab

All the data on this tab is optional and can be completed if required.



Plans tab

Indicate which has occurred for the patient in the last 12 months.



Observations tab

The 'Height', 'Weight', 'Blood Pressure', and 'Smoking Status' are retrieved from the PMS. This data will be editable in the form.
Vaping Status will not be retrieved from the PMS and will need to be entered.

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LTC tabs

Ticking any of the 'Long Term Conditions' checkboxes, and the 'Severe and enduring mental illness/ Addiction' checkbox reveal 1 or more related tabs. Tabs are revealed in the following manner:

Cardiovascular:
- *Cardiovacular/Strok*e tab

Diabetes:
- *Diabetes* tab
- *Cardiovacular/Stroke* tab

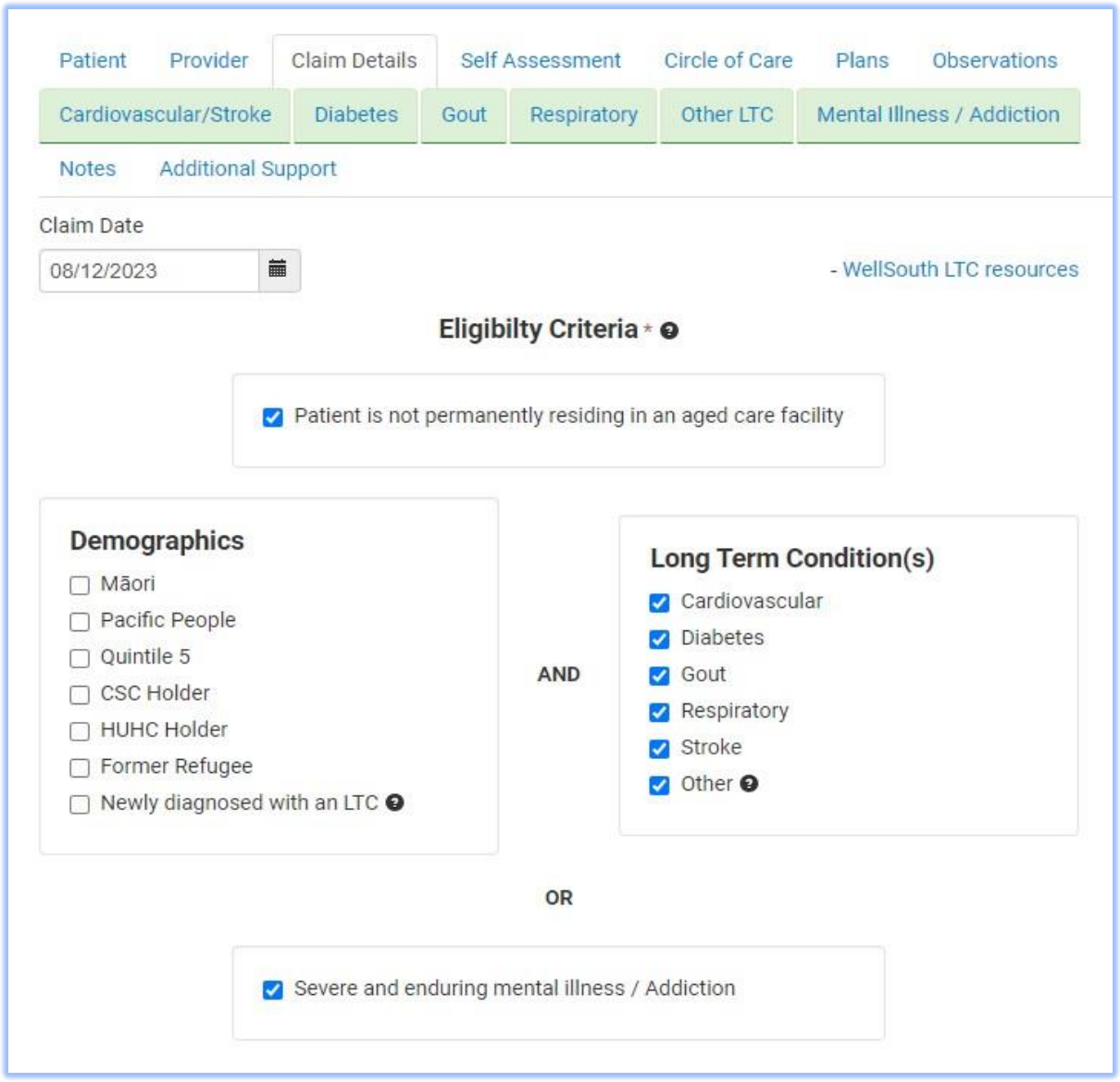
Gout:
- *Gout* tab

Respiratory:
- *Respiratory* tab

Stroke:
- *Cardiovacular/Stroke* tab

Other:
- *Other LTC* tab

Severe and enduring mental illness/ Addiction:
- *Mental Illness/Addiction* tab



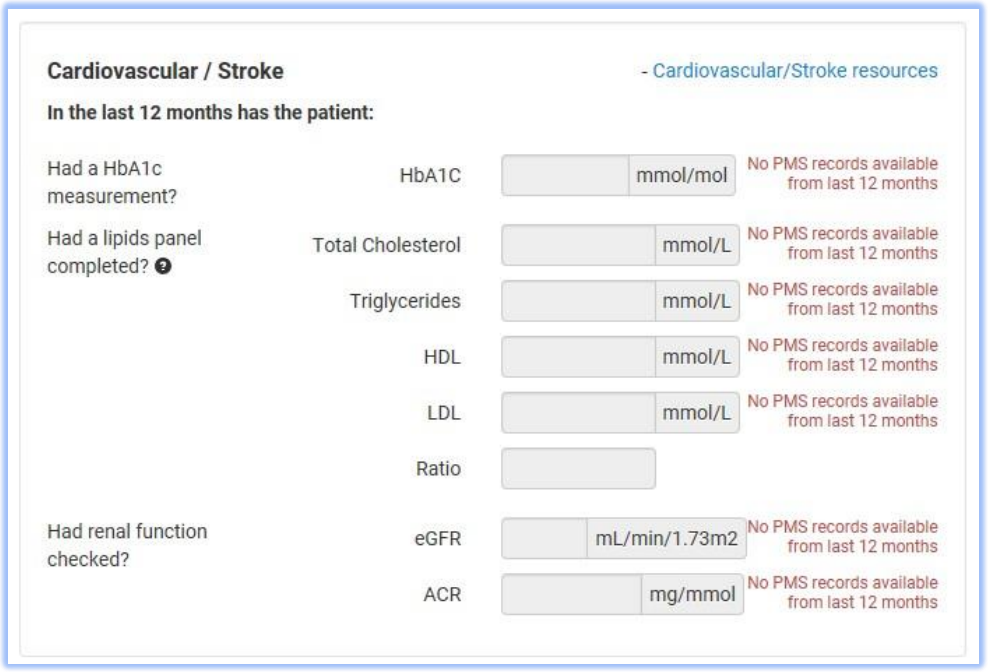
- Automatic population of data from PMS

Most of the patient observations, screenings, and lab data will be populated from the PMS. If readings are considered 'too old' or are not available, warning messages will appear informing the clinician of any issues.

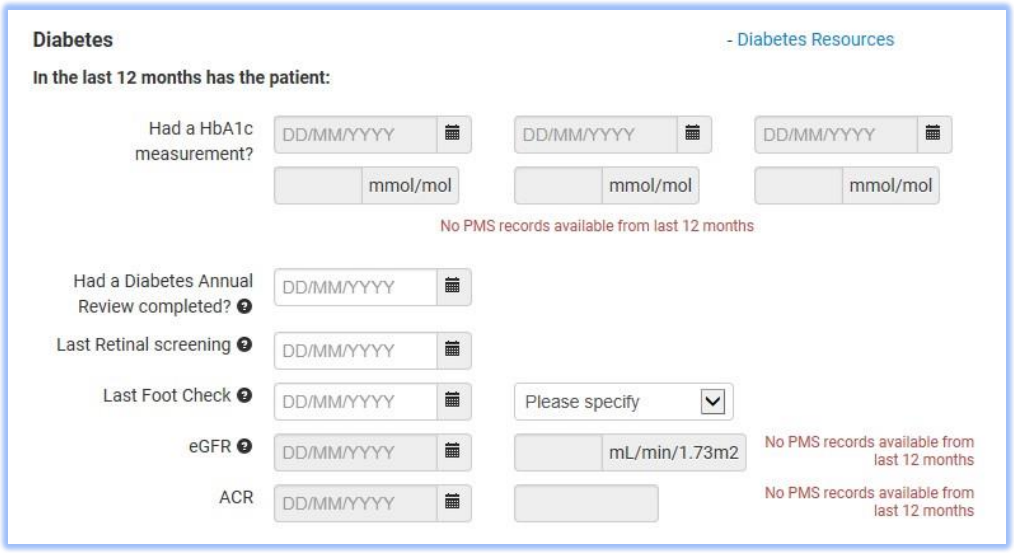
Lab data will not be editable in the form when using a PMS – data can only be populated from existing lab data in the PMS.

Labs:

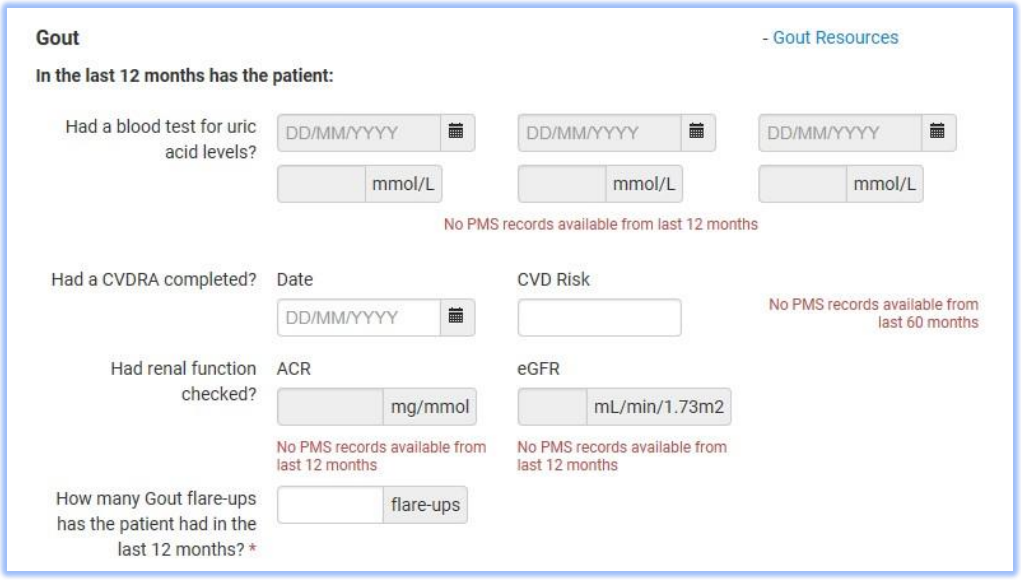
Cardiovascular/Stroke – All fields populated from the PMS.



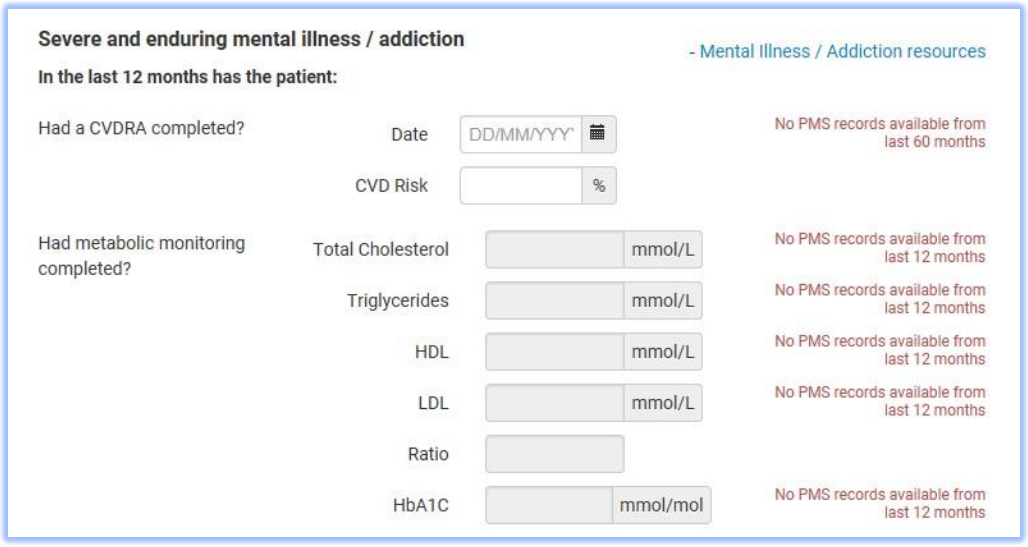
Diabetes – All lab fields populated from the PMS. DAR, Retinal screenings, and foot check populatedif available/possible, but can be manually entered if needed.



Gout – All lab fields populated from the PMS. CVD Risk populated if available/possible but can be manually entered if needed.



Severe and enduring mental illness/ Addiction – All lab fields populated from the PMS. CVD Risk populated if available/possible but can be manually entered if needed.

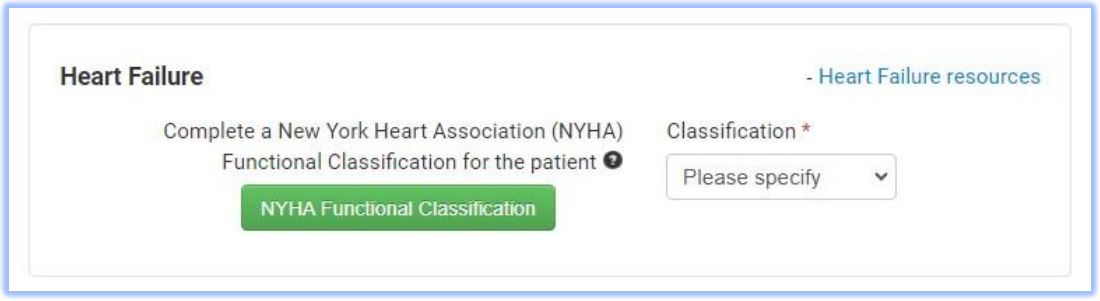


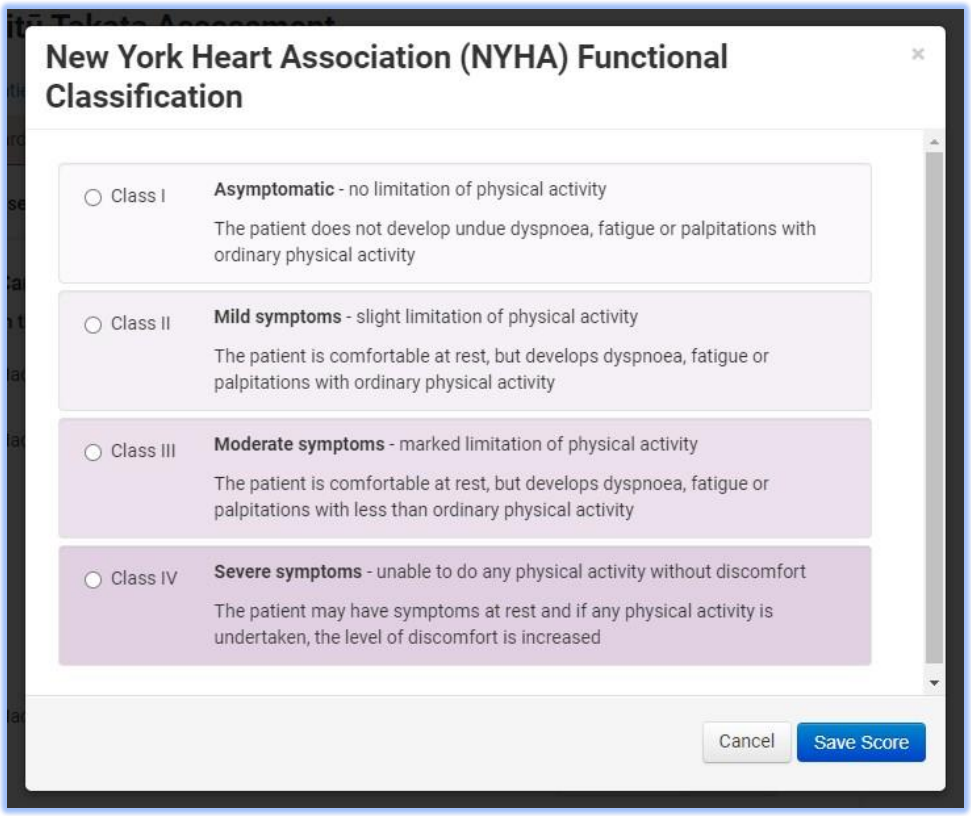
- Questionnaires

The Cardiovascular/Stoke and the Respiratory tabs contain questionnaires.

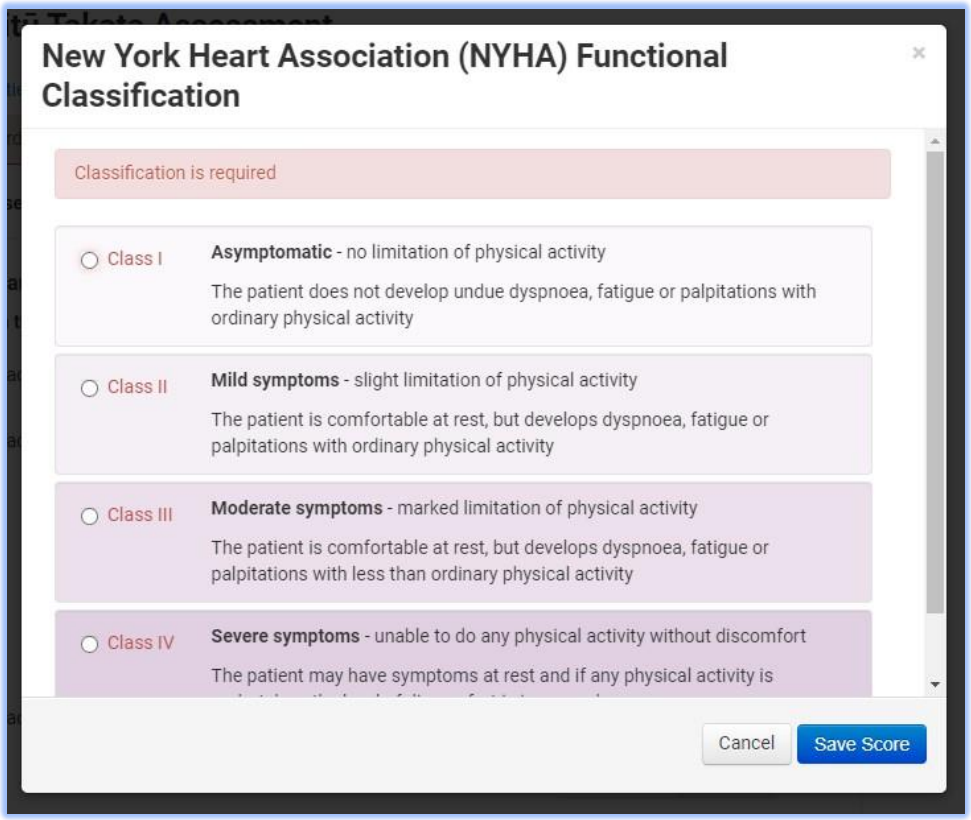
We will use the 'New York Heart Association (NYHA) Functional Classification' on the *Cardiovascular/Stroke* tab as an example. This questionnaire will update the 'Classification' field in the *Heart Failure* section of the tab.

Each questionnaire is presented in a modal window and is revealed when clicking the appropriate green questionnaire button.





Each field in the questionnaires must be completed before it can be 'saved'.

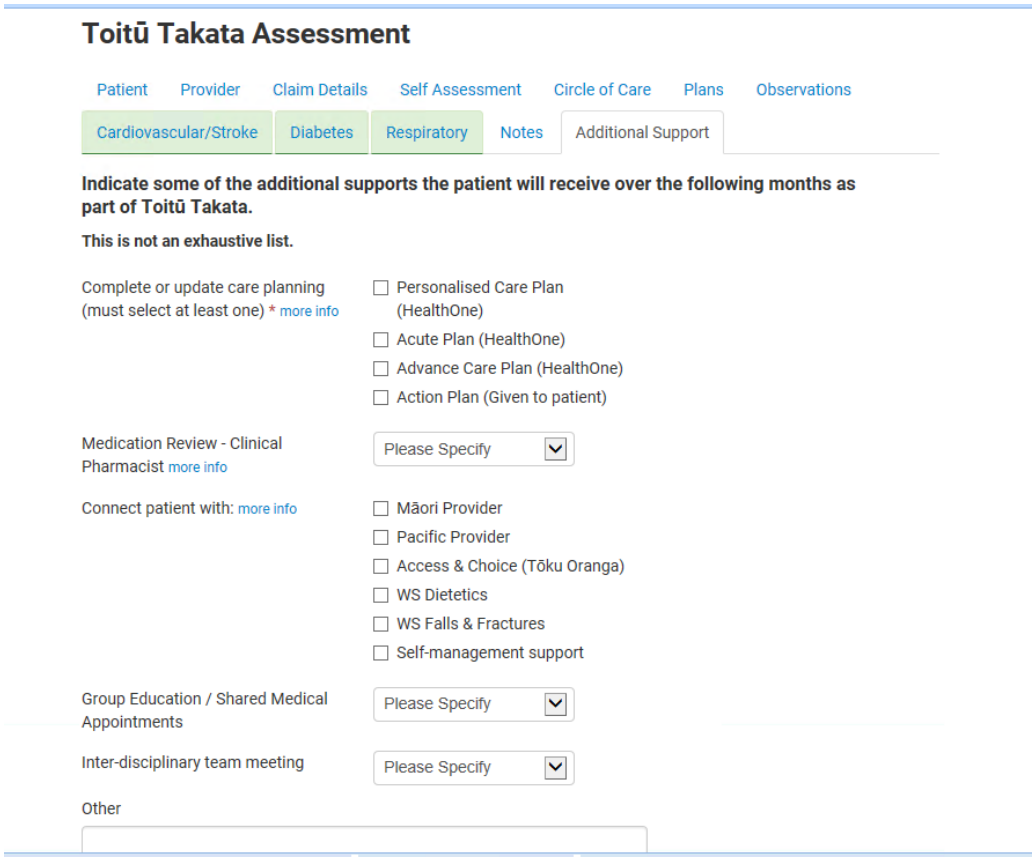


Once completed and saved, the appropriate value(s) will be updated in the form. For this 'New York Heart Association (NYHA) Functional Classification' questionnaire, the 'Classification' will be updated upon saving the form.

Additional Support tab

Indicate what supports will be provided for the patient throughout the year.

This information is used to generate the Patient Summary.
NOTE: information written in the 'Other' field on this page will print onto the Patient Summary.

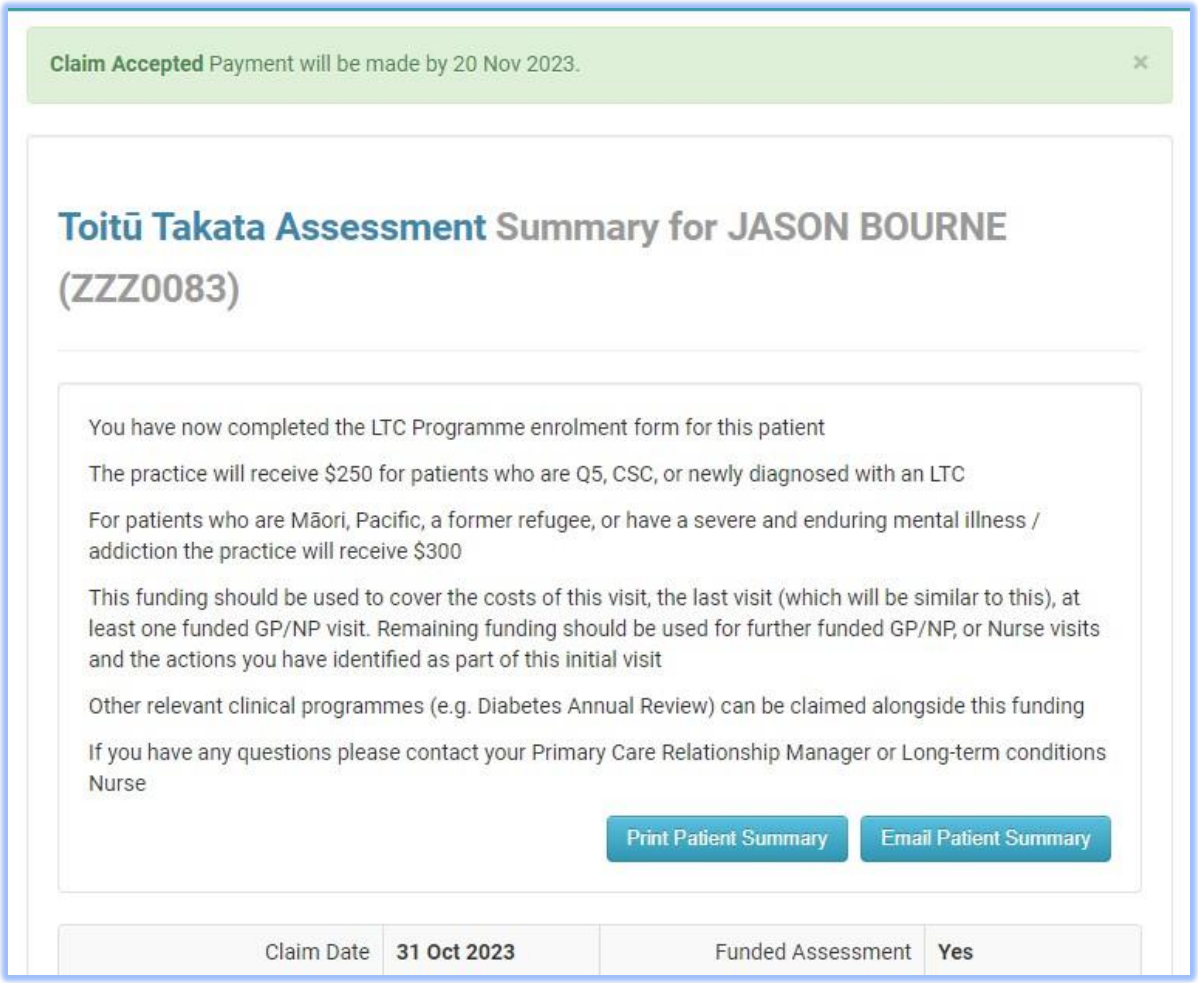


Summary:

If the assessment is successfully completed, the form will display some extra information about the programme, including how much funding is available, and how the funding should be used.

This section will also contain 2 buttons allowing you to print or email the Patient Summary.

NOTE: This Patient Summary text is independent of the Assessment Summary seen on this page.



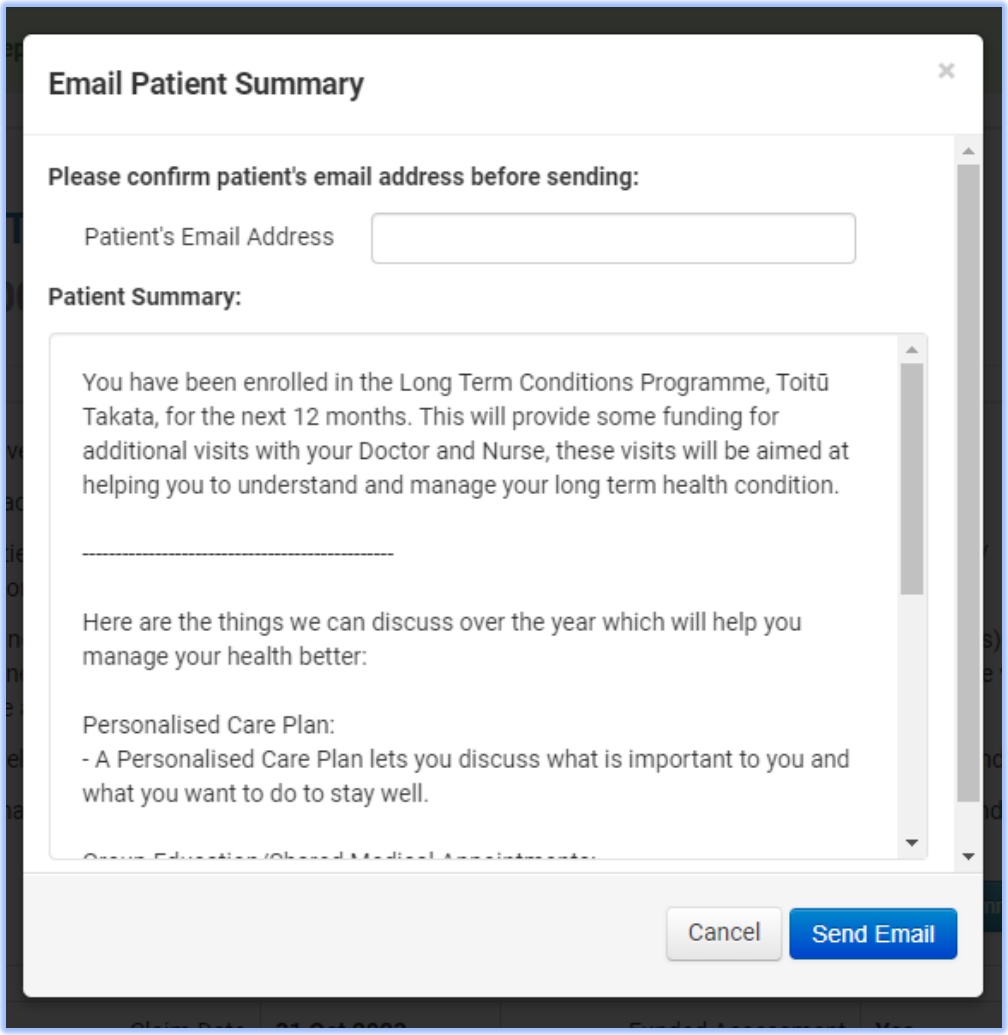
- Print Patient Summary

Clicking the ‘Print Patient Summary’ button open the ‘print’ window allowing you view and print the Patient Summary.

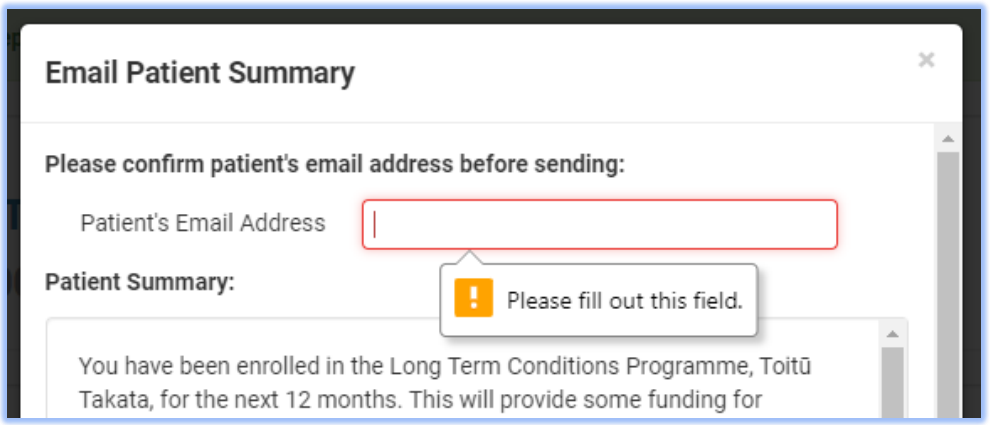
- Email Patient Summary

The Patient Summary can also be emailed to the patient by clicking the ‘Email Patient Summary’ button.

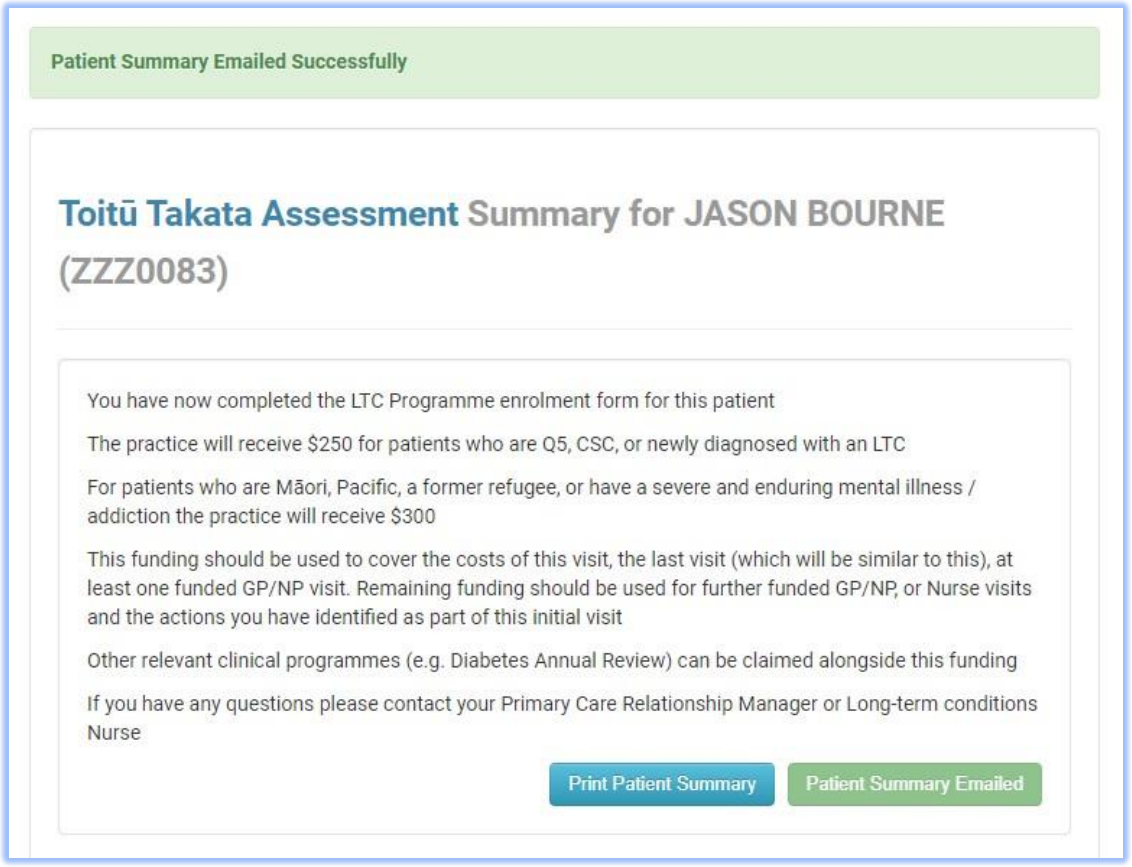
A modal window will appear allowing you to enter/review the email address for the patient and review the Patient Summary copy.



The email address will be automatically populated from the PMS, if available. This can be over-ridden here is necessary. The email cannot be sent without a valid email address entered.



Once the form has been successfully submitted, the outcome of the emailing event will be appended to the top of the summary page. If successful, the 'Email Patient Summary' button will change colour to green and be disabled.



- Patient Inbox

The Assessment's summary will also be saved to the Patient's inbox in the PMS. This page will contain both the Assessment Summary and the Patient summary, allowing the clinician to refer back to either when reviewing the patient.