MyWai – Person Dashboard

To enter the Person Dashboard, click on the Person's name from a worklist

Person View: View only

If you are NOT part of the Care Team for this Person, the Person View is restricted to **Risks** and the **Care Team**.

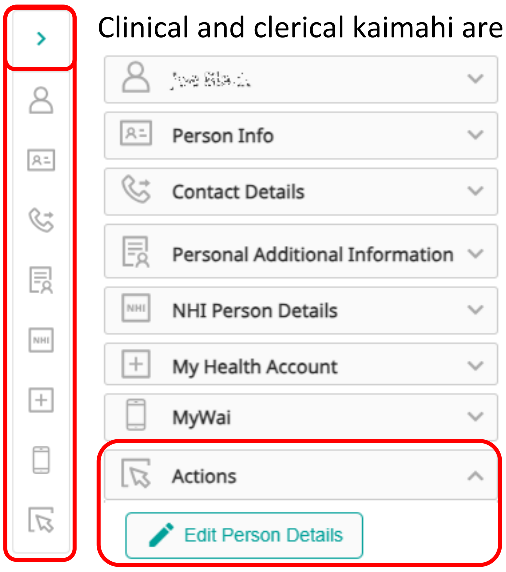
View-only access allows you to view the record AND update demographics.

From the **Person Dashboard** on the right, click [+ Join all care teams as view-only] add an **End Date** for your access and click **Save**.

Indicates **view only**

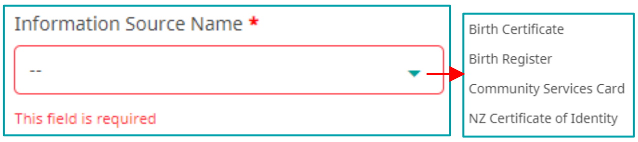
MH CCT
22/11/2024

Person Demographics



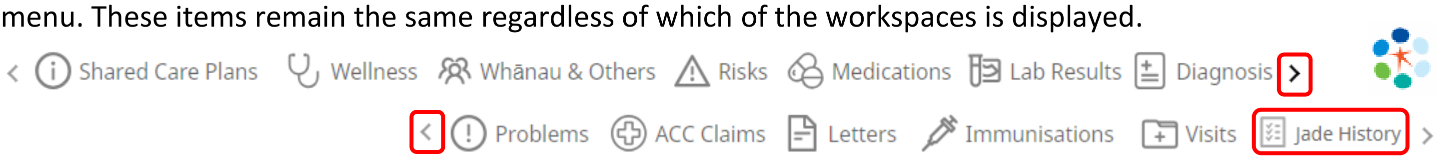
Clinical and clerical kaimahi are able to update demographics from the Person Dashboard.

1. To edit demographics, open the **Person Dashboard**. If you can't see the full menu on the far left, add yourself as view-only (see above)
2. When you have access, expand the menu and scroll down to **Actions** and click **Edit Person Details**
3. Make changes as needed including three additional mandatory (*) fields providing the source of information in the form. These fields are required in order to **Submit** the changes to MyWai and NHI



Person Dashboard Horizontal menu

A long horizontal menu is visible across the top of the Person Dashboard - scroll to access other sections of the menu. These items remain the same regardless of which of the workspaces is displayed.



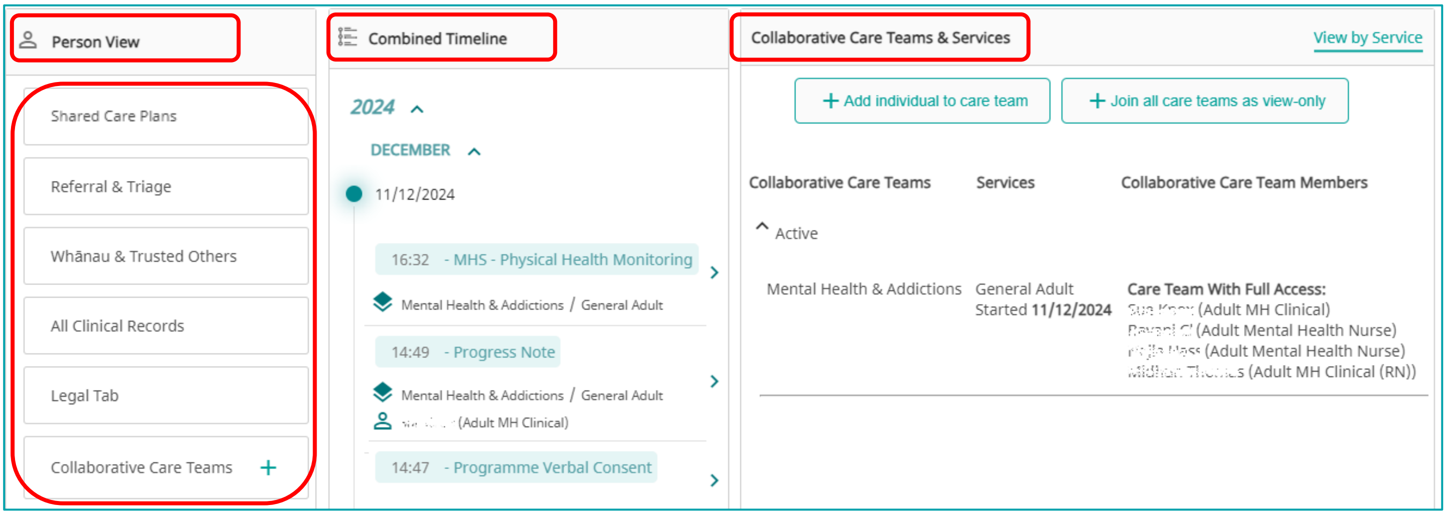
Menu item	Explanation	Action(s) possible
Shared Care Plans	Contains the Person's Health Passport, a Personalised Care Plan and an Advance Care Directive	[Edit or download]
Wellness	Wellness feedback from various aspects: Physical Well-being, Mental & Emotional Well-being, Addiction, Spiritual, Connection, Whakapapa, etc.	[Edit or download]
Whānau & Others	A list of whānau & trusted others from MyWai	[Add New Member]
Risks	A list of MyWai entered risks for this Person (NOT linked to RCP Alerts)	[Add Risk]
Medications	Integration to lists from (1) ISPRX, (2) Eclair and (3) Jade medications	
Lab Results	Integration to Eclair Lab Results	
Diagnosis	A list of MyWai entered Diagnoses (SNOMED-CT, DSM-IV (MH), ICD-10)	[Add Diagnosis]
Problems	A list of Problems (Person's challenges) entered into MyWai	[Add Problem]
ACC Claims	A list of ACC Claims entered into MyWai	[Add ACC Claim]
Letters	View letters generated from MyWai	
Immunisation	A list of Immunisations (from self-report or transferred from GP)	[Add Immunisation Record]
Visits	A search facility for regional visits for this Person	Filter by date/date range
Jade History	**Check Phone, Consent and Person History from Jade**	**Read only**
RCP	Link to this Person's RCP record	

Person View Menu

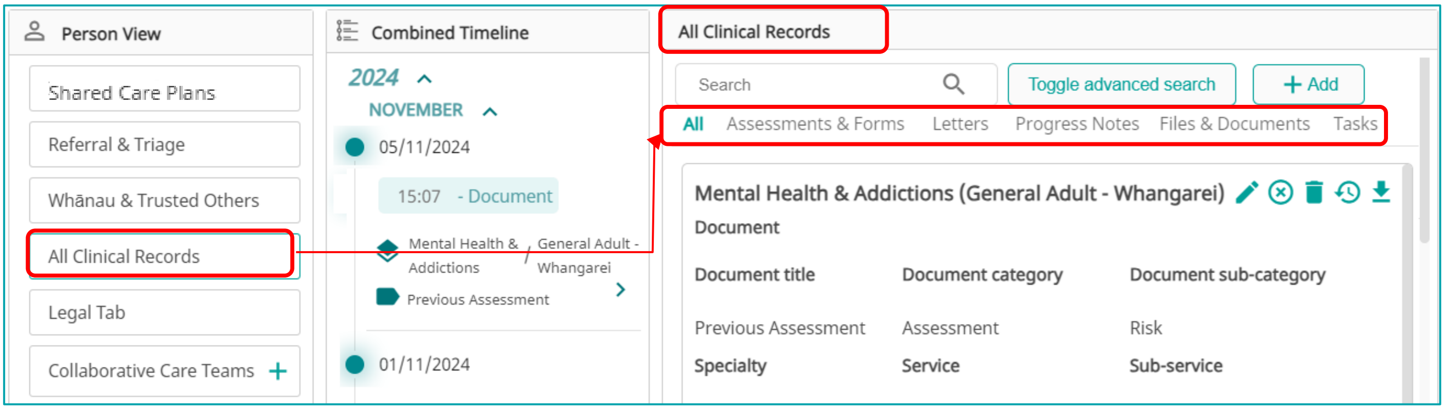
In the **Person View**, a vertical menu AND the **Combined Timeline** allow access to the clinical record.

The vertical menu and timeline change depending on which dashboard is displayed – this is the **Person View**.

The Collaborative Care Teams & Services on the right show ALL of those involved in the care of this Person.



Click **All Clinical Records** to display a sub-menu used to view and filter types of records.



Add a Clinical Record

There are multiple places from where clinical records can be added (**Add a Clinical Record QRC**), although most records will be created from inside an **Event** or **Appointment**, so they can be linked together.

Legal Tab

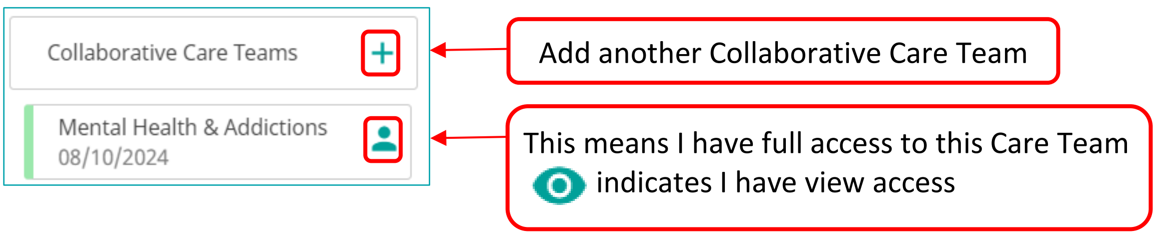
A view of the Person's status under the Mental Health Act (**Mental Health Act QRC**)

View/Add Collaborative Care Teams

A Collaborative Care Team enables access to this Person's record for ALL full access Care Team Members.

A Care Team could include multiple services sharing their clinical records while that referral is current. Services can be added and removed as appropriate for the support required through the journey.

View all Collaborative Care Teams involved in this Referral. Click **+** to Add a new Collaborative Care Team.

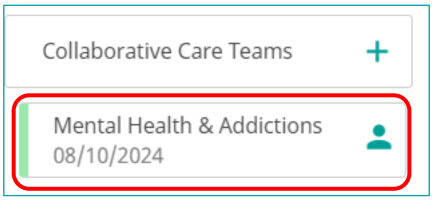


THREE MORE WORKSPACES

Three more workspaces are accessible from the Person Dashboard, so Care Providers can work efficiently

1. Collaborative Care Team workspace

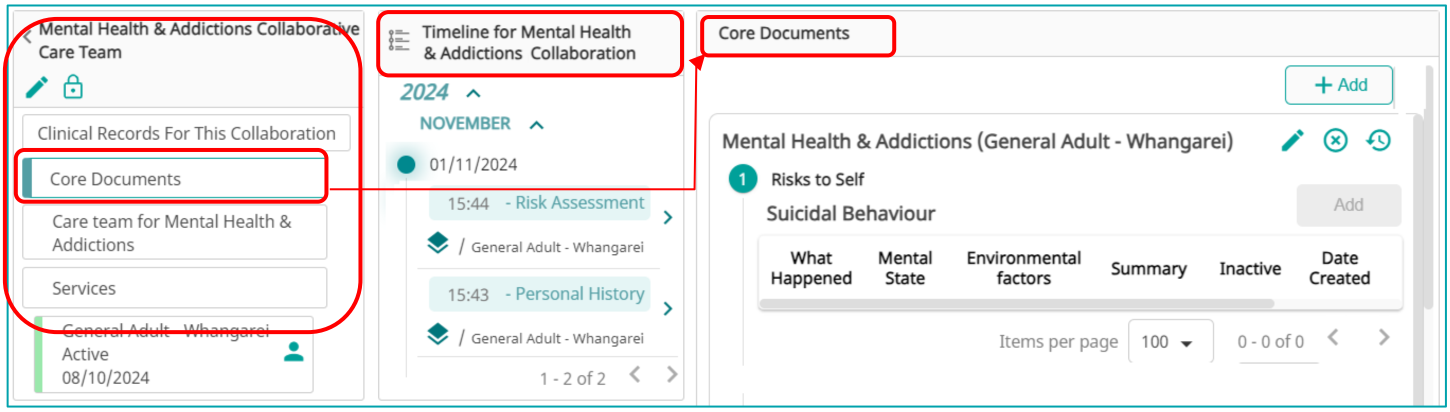
In the **Person view**, click a **Collaborative Care Team** listed to enter the Care Team workspace



The coloured bar on the left indicates the status of the Care Team, **Active**=green, **Inactive**=grey

The person silhouette indicates that whoever is logged in, is a member of that care team

The Collaborative Care Team menu and timeline is filtered for this Care Team

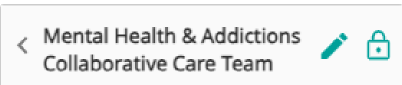


Use the back arrow to return to the Person View

Collaborative Care Team menu

- **Clinical Records** View and Add any record to be available for this Collaborative Care Team
- **Core Documents** View and Add a **Core Document** to share within this Care Team
  Documents to be created are set by the services in the Care Team,
  eg Risk Assessment, Treatment Plan, Personal History
- **Care Team** View and Add/Remove Care Providers as **Care Team Members (**and edit roles)
- **Services** View **Services** involved in the Person's care

Collaborative Care Team workspace (clinical users)



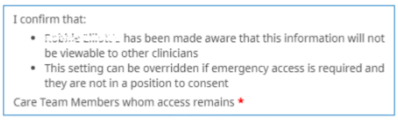
Return to the Person View

Rename Collaborative Care Team

Setup Limited Access (with Person's agreement)

Remove Limited Access (with Person's agreement)

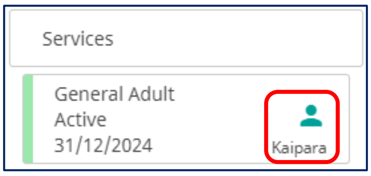
Setup/Remove Limited Access



- Restricts access to this record for ONLY selected individuals specified when Limited Access is activated (all others removed from Care Team).
- Anyone attempting to access is prompted to complete consent declaration, except in an emergency.
- When Limited Access is removed, the Removed Care Team Members need to be re-added.

2. Service workspace (Most commonly used workspace)

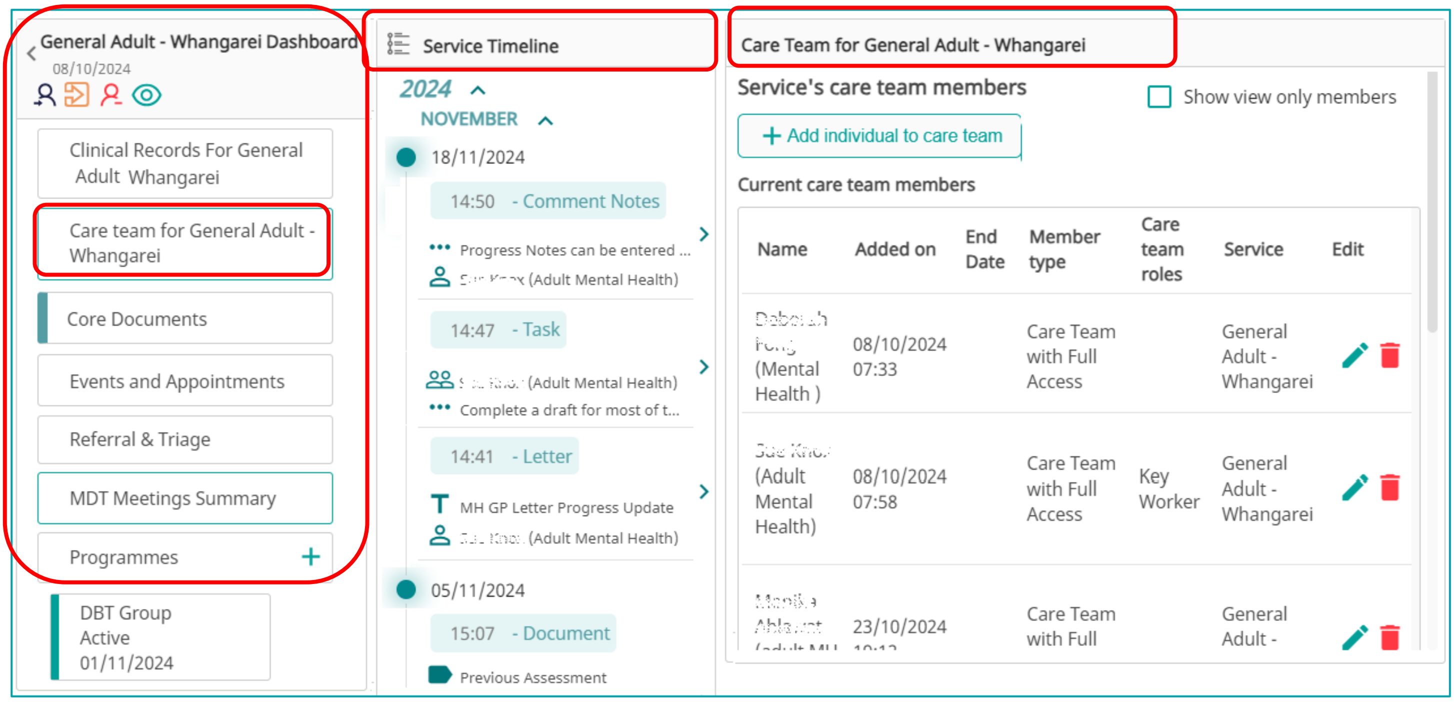
Inside a Collaborative Care Team workspace, all Services in that Care Team are listed under **Services**

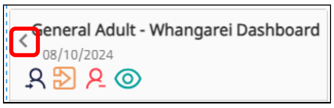


Select a Service to explore the Service dashboard

Services with multiple locations are identified by location

Service menu and timeline is filtered for this Service





Use the back arrow to return to the Collaborative Care Team workspace

Service menu

- **Clinical Records** View records for this Service (Add records not linked to an Event/Appt)
- **Care Team** View/edit the Care Team for this Service
- **Core Documents** View/Add **Core Documents** for this Service
  Documents for sharing to save duplication, eg Risk Assessment, etc
- **Events and Appointments** View/Add Events and Appointments for this Service and add records
- **Referral & Triage** View Referral, Triage and Event details
- **MDT Meetings Summary** View/edit a summary of the MDT meetings (download a pdf)
- **Programmes** View/Add **Programmes** involved in the Person's care

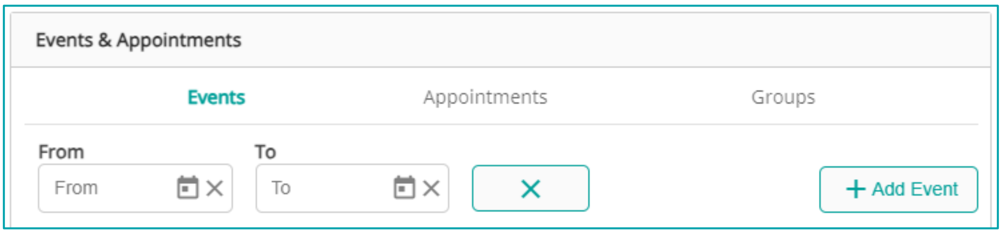
Care Team

Click **Add individual to care team** and select the individual to add

Events and Appointments

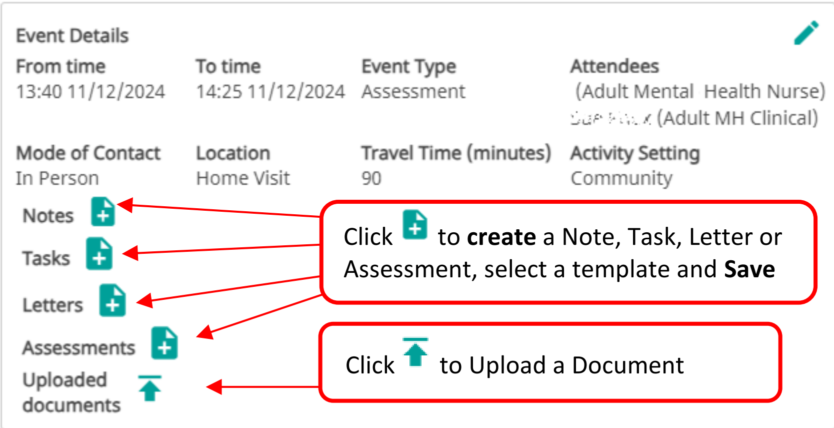
View and filter existing **Events, Appointments** and **Group** (appointments), or **Add Event** that has occurred

1. In Events & Appointments, click **Add Event**, add setting and participants
2. Complete other details as required and **Submit**



Add Records linked to the Event or Appointment

Once an Event/Appointment has been recorded, clinical records appropriate to that Event/Appointment can be created (and linked) by selecting a type of record to generate, from the Event/Appointment.

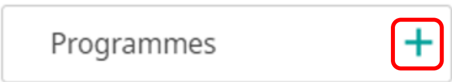


For more information on booking Appointments, see **Appointments and Clinics QRC**

For more information on Groups and Group Appointments, see **Group Appointments QRC**

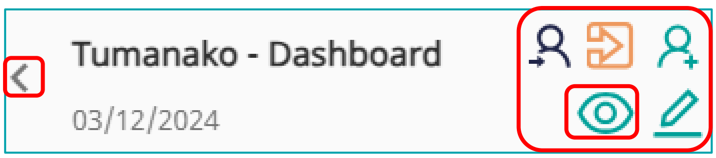
Programmes

To add a Programme to this Person's record, click **+** in Programmes, select a programme from the drop-down list of Programmes for your Service. This adds the Person to the **Waitlist** for that Programme, so the status can be changed at any time to **Activated**, then **Discharged** as appropriate.



Mental Health Inpatient Seclusion – To record seclusion for an Inpatient, add the **Seclusion Programme** (from **Active Worklist** or from **Person Dashboard**) (**Seclusion Workflow QRC**)

Service Dashboard (clinical users)



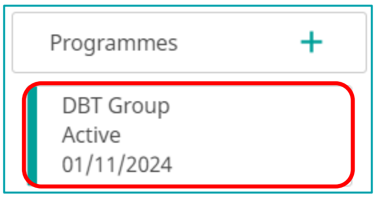
Move to other care team (transfer)
Discharge from service
Add Treatment Plan
Add this Person to MDT meeting
Mark service as sensitive
Edit/Add Referral Reason (Inpatient)

Mark service as sensitive (from Service Dashboard only)

If a Person wishes, a specific service can be marked as **sensitive**, so its nature is not exposed in the Person Dashboard. When a service is marked as **sensitive**, it prevents people who are not members of the care team from seeing anything about the service, including its name, without joining the team.

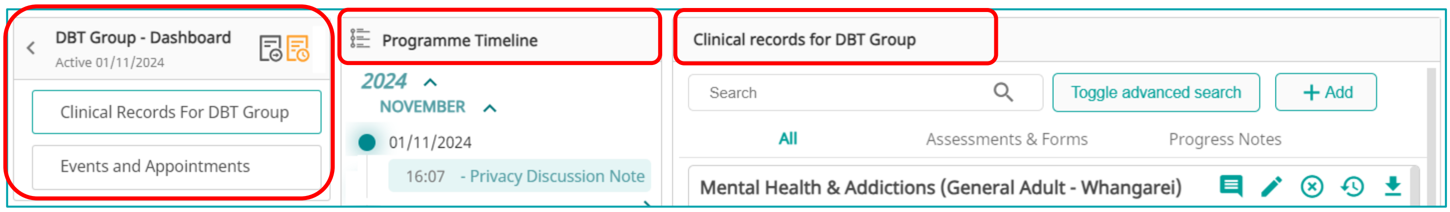
3. Programme workspace

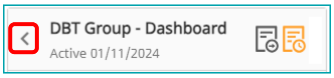
Select a Programme from the Service workspace to explore



Select a Programme to explore the Programme workspace

Programme menu and timeline is filtered for this Programme





Use the back arrow to return to the Service dashboard

Programme menu

Clinical Records (for this Programme)

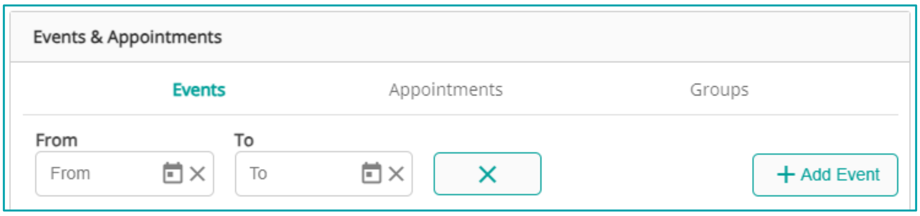
View **Assessments, Forms** & **Progress Notes** for this Programme (Add records **not** linked to an Event)

1. In **Clinical Records**, click **Add**, select note, assessment or form and **Save**
2. Select which Assessment, Form or Note to add, click **Save**, and details, then **Submit**

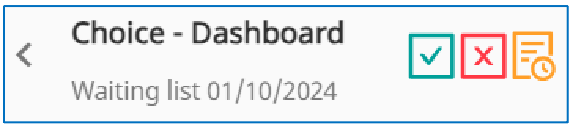
Events and Appointments

View and filter existing **Events, Appointments** and **Groups**, or **Add Event** that has occurred

1. In **Events & Appointments**, click **Add Event or an Appointment**, add setting and participants
2. Complete details and **Submit**
3. Select the Event/Appointment, then click an icon to add a record linked to this Event/Appointment (as in Service Dashboard above) (All records are visible also in **Clinical Records**)



Programme Dashboard (clinical users) *Waiting list*

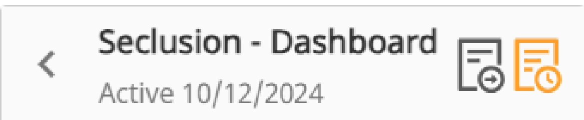


Activate

Decline

Status changes (available to all)

Programme Dashboard (clinical users) *Active*



Discharge

Status changes (available to all)