



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

Information Source Name *

Birth Certificate
Birth Register
Community Services Card
NZ Certificate of Identity

This field is required

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.

Shared Care Plans Wellness Whānau & Others Risks Medications Lab Results Diagnosis Problems ACC Claims Letters Immunisations Visits Jade History

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.

The screenshot shows the 'Person View' dashboard. On the left is a vertical menu with items: 'Shared Care Plans', 'Referral & Triage', 'Whānau & Trusted Others', 'All Clinical Records', 'Legal Tab', and 'Collaborative Care Teams +'. The 'All Clinical Records' item is highlighted with a red box. The middle section is the 'Combined Timeline' for 2024, showing events for December: '11/12/2024' with '16:32 - MHS - Physical Health Monitoring', '14:49 - Progress Note', and '14:47 - Programme Verbal Consent'. The right section is 'Collaborative Care Teams & Services' with buttons '+ Add individual to care team' and '+ Join all care teams as view-only'. Below are sections for 'Collaborative Care Teams', 'Services', and 'Collaborative Care Team Members'.

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

The screenshot shows the 'Person View' dashboard with the 'All Clinical Records' sub-menu open. The sub-menu has a search bar, 'Toggle advanced search', and '+ Add' button. Below the search bar are filter tabs: 'All', 'Assessments & Forms', 'Letters', 'Progress Notes', 'Files & Documents', and 'Tasks'. The 'All' tab is selected. Below the filters is a table of records for 'Mental Health & Addictions (General Adult - Whangarei)'. The table has columns: 'Document title', 'Document category', and 'Document sub-category'. The first row is 'Previous Assessment', 'Assessment', 'Risk'. The second row is 'Specialty', 'Service', 'Sub-service'.

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.

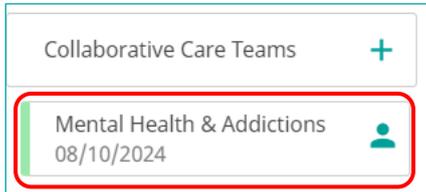
The screenshot shows the 'Collaborative Care Teams' list. The first item is 'Collaborative Care Teams' with a red '+' icon. The second item is 'Mental Health & Addictions 08/10/2024' with a red person icon. Red arrows point from text boxes to these icons. The first text box says 'Add another Collaborative Care Team'. The second text box says 'This means I have full access to this Care Team' and '👁 indicates I have view access'.

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.

I confirm that:

- **ROBINA SMITH** has been made aware that this information will not be viewable to other clinicians
- This setting can be overridden if emergency access is required and they are not in a position to consent

Care Team Members whom access remains *

2. Service workspace (Most commonly used workspace)

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



Services

General Adult
Active
31/12/2024

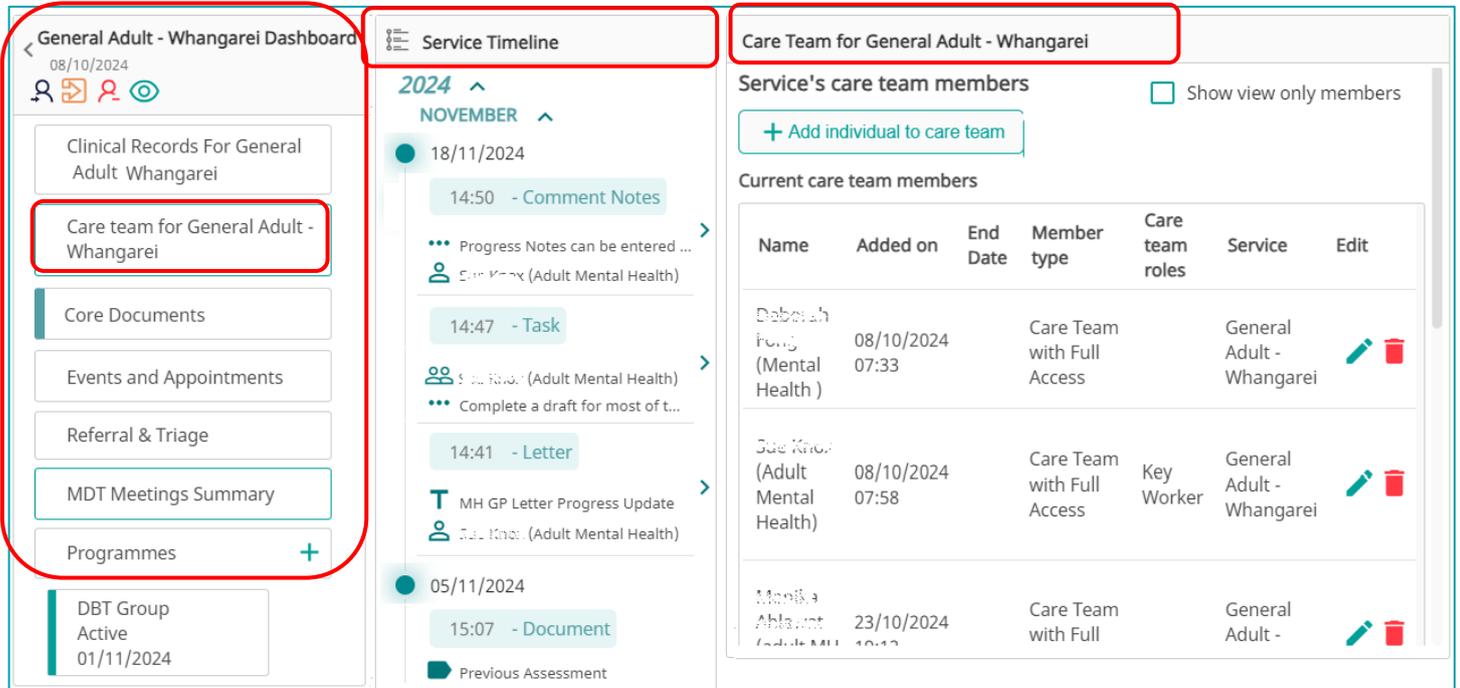
Kaipara



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



General Adult - Whangarei Dashboard
08/10/2024

Clinical Records For General Adult Whangarei

Care team for General Adult - Whangarei

Core Documents

Events and Appointments

Referral & Triage

MDT Meetings Summary

Programmes

DBT Group
Active
01/11/2024

Service Timeline

2024

NOVEMBER

18/11/2024

14:50 - Comment Notes

Progress Notes can be entered ...

Joe Know (Adult Mental Health)

14:47 - Task

Joe Know (Adult Mental Health)

Complete a draft for most of t...

14:41 - Letter

MH GP Letter Progress Update

Joe Know (Adult Mental Health)

05/11/2024

15:07 - Document

Previous Assessment

Care Team for General Adult - Whangarei

Service's care team members

+ Add individual to care team

Show view only members

Current care team members

Name	Added on	End Date	Member type	Care team roles	Service	Edit
Deborah Perry (Mental Health)	08/10/2024 07:33		Care Team with Full Access		General Adult - Whangarei	 
Joe Know (Adult Mental Health)	08/10/2024 07:58		Care Team with Full Access	Key Worker	General Adult - Whangarei	 
Monika Ahlert (Adult Mental Health)	23/10/2024 10:12		Care Team with Full		General Adult - Whangarei	 



General Adult - Whangarei Dashboard
08/10/2024

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

+ Add individual to care team

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.

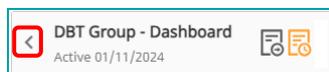
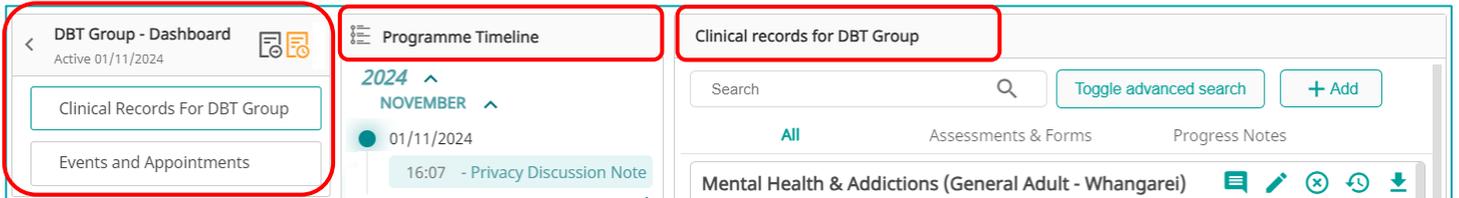
3. Programme workspace

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)

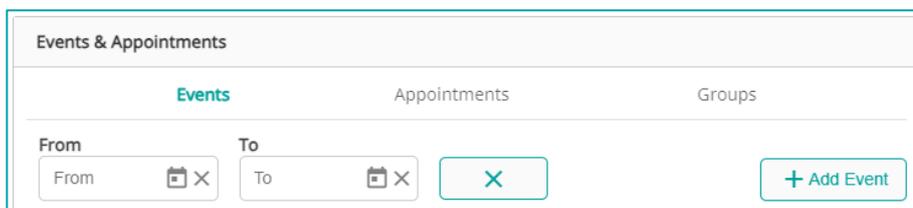
View **Assessments, Forms & Progress Notes** for this Programme (Add records **not** linked to an Event)

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**

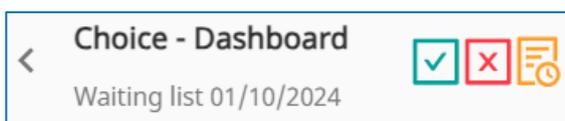
Events and Appointments

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

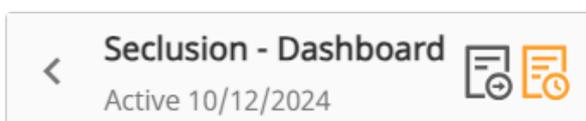


Decline



Status changes (available to all)

Programme Dashboard (clinical users) *Active*



Discharge



Status changes (available to all)