



Service/Programme Dashboard: Events & Appointments

Ideally, whenever interaction has taken place, a Service **Event** OR an **Appointment** should be used to capture the details of that interaction (for statistical/reporting purposes) and at the same time, it's the perfect place to add clinical records relating to that Event or Appointment.

Events and Appointments can be added from the **Service** workspace OR the **Programme** workspace, using Events and Appointments. From a worklist, click the **Service** OR **Programme** shortcut, and scroll down to find **Events and Appointments**.

Events and Appointments

+ Add Event
+ Create Appointment

In **Events** (past occurrence) or **Appointments** (scheduled), click **Add Event** or **Create Appointment** to add details, then in the event/appointment, click the record type to add. Records created from an Event or an Appointment will be visible in that event/appointment AND in the Timeline AND in All Clinical Records. (see [Appointments and Clinics QRC](#))

Event Details ✎

From time	To time	Event Type	Attendees
13:40 11/12/2024	14:25 11/12/2024	Assessment	(Adult Mental Health Nurse) Daphne (Adult MH Clinical)
Mode of Contact	Location	Travel Time (minutes)	Activity Setting
In Person	Home Visit	90	Community

Notes + 📄

Tasks + 📄

Letters + 📄

Assessments + 📄

Uploaded documents ↑ 📄

Click + 📄 to **create** a Note, Task, Letter or Assessment, select a template and **Save**

Click ↑ 📄 to Upload a Document

Types of Records and actions available after completion

Progress Notes

- Select a template > **Save** > **Submit** > AFTER Submitting: **Edit - Download**

Assessments & Forms

- Select a template > **Save** > **Next - Submit** > AFTER Submitting: **Edit**

Letters

- Select a template > **Generate** > **Submit** > AFTER Submitting: **Edit - History - Preview - Download**

Tasks

- Select Due Date and add details > **Submit** > AFTER Submitting: **Edit - Download**

Files & Documents

- Upload a file > **Submit** > AFTER Submitting: **Edit - Redact - Delete - Download**

Edit
✎

Redact
⊗

Delete
🗑️

Download
↓

History
🕒

Deactivate
⚠️

Redact: locks the document, marks it as **Redacted**, and does NOT delete it.

⊗

Active Worklist

Add **Notes** (**not** linked to an Event) directly from the **Active Worklist** (and **Crisis Management Worklist**)

These notes will be displayed under **All Clinical Records**

Alerts	Person Details	Collaborative Care Team	Service	Status	Programme Details	Care Team	Notes	MDT	Appt	Referral Reason	Actions
	Ran Dizon 04/05/2012 (12)	Mental Health & Addictions	Integrative Community Therapy	⊖	⊕			○	+		

Add Notes

Privacy Discussion Note
Progress Note
SOTAP Note



Click the **Notes** icon, select the Notes template required, **Save**, then add content to the notes template.

My Caseload

Add **Notes** and **Assessments** (**not** linked to an Event) from **My Caseload**

These notes and assessments will be displayed under **All Clinical Records**

Assessment icons:

Add new **Draft** **Submitted**

0 / 2	Alerts	Person Details	Collaborative Care Team	Service	Add/Edit Care Team	Notes	Assessments	MDT	Appointment	Referral Reason	Actions	Last Contact
<input type="checkbox"/>		Seamus Elliott 01/01/1997 (27)	Mental Health & Addictions	General Adult				○	+		 	

Person/Care Team/Service/Programme Workspace

From the menu, click **(All) Clinical Records** to display a sub-menu of the record types to view/add.

Person View

Shared Care Plans

Referral & Triage

Whānau & Trusted Others

All Clinical Records

Legal Tab

Collaborative Care Teams

Combined Timeline

2024

NOVEMBER

05/11/2024

15:07 - Document

Mental Health & Addictions / General Adult - Whangarei

Previous Assessment

01/11/2024

All Clinical Records

Search

All Assessments & Forms Letters Progress Notes Files & Documents Tasks

Mental Health & Addictions (General Adult - Whangarei)

Document

Document title	Document category	Document sub-category
Previous Assessment	Assessment	Risk
Specialty	Service	Sub-service

Person View: Add a Clinical Record (**not** linked to an Event)

From the Dashboard menu, click **All Clinical Records**

1. Click **Add** and select a record type
2. Click **Save**
3. Select the sub-type and **Save**

Add Medical Events

Assessments & Forms
Files & Documents
Letters
Progress Notes
Tasks

Add Medical Events

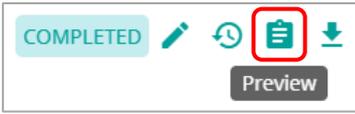
Assessments & Forms

Add Assessments & Forms

This field is required

Preview and Download letters onto letterhead

- Once Submitted, the buttons in the top right allow further actions, including **Preview**
[Please check that a letter is **Finalised** by the author before Previewing]



- From the Preview screen, **Download** the letter to see it presented on Health NZ letterhead



- Once downloaded via Preview, the letter can be **Printed** or **Saved** as required



Notifications

ALL submitted letters are listed in Notifications, so take care to ONLY download, print/post **FINALISED** letters.

- In **Notifications > Letter**, filter letters by **Status**, **Template**, **Author** or **Person name**
- Any recipients indicated in the letter are displayed in the **Recipient** column, each recipient letter is displayed in a separate row, allowing the date sent for each to be recorded
- From **Actions**, **Download** the required letter, then select **Print** or **Save** as required.



Letters are presented on Health NZ letterhead when you use the **Download** button, but not via **Preview**.

Person Details	Recipient	Template	Is Custom	Letter Sent	Status	Assigned to	Actions
BL... Test 13/01/2000 (25)	Deborah Long Address:	MH GP Letter Progress Update	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Draft	Sue May (S. Adult MH Clinical)	
BL... Test 13/01/2000 (25)	Shadab Al-Saffar Address:	CH Standard Declined referral letter	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Finalised	Deborah Long (Child Health)	
BL... Test 13/01/2000 (25)	Fred Dagg Address: 10 Manuka Road, Avenues, Whangarei 0110	CH Standard Declined referral letter	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Finalised	Deborah Long (Child Health)	
BL... Test 13/01/2000 (25)	Test BL... Address: 1 Hospital Road, Horahora, Whangarei 0110	CH Standard Declined referral letter	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Finalised	Deborah Long (Child Health)	
BL... Test 13/01/2000 (25)	Test BL... Address: 1 Hospital Road, Horahora, Whangarei 0110	CH MDT Referral Acknowledgement Letter	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> 02.05.2025 09:24	Finalised	Deborah Long (Child Health)	

As each letter copy is downloaded and printed (then posted) or saved (then emailed), please record the date:

- Click to record and click **Yes** to confirm

Letter Sent

Are you sure that you want to mark this letter as sent? X

Inpatient > Whiteboard > HONOS

Bed Name	Person Details	Admission Date	Estimated Leave Date	Length Of Stay	Delayed Discharge	Honos	L/S	L/Review	Responsible Clinician	OBS	Leave	Acuity	Notes	Actions
PONO 4	01/01/1997	03.12.2024	17.12.2024	7 days ago		+								

From **Inpatient**, select the **Whiteboard**, then under **Honos**, click + to create a **HONOS**. This form is completed on Admission and Discharge OR every 3 months, to be collated for MoH reporting.

Add a Core Document

Core Documents are living documents continually updated as required for the life of the Person's MyWai record. From the Service workspace, if the **Core Documents** option is displayed, click to see the **Add** button. A list of Core Documents for your Service will be displayed, if your Service is using Core Documents. Once added, a Core Document displays in **Core Documents** as well as in **Clinical Records** under the **All** heading

The green bar indicates that Core Documents have been added to this record

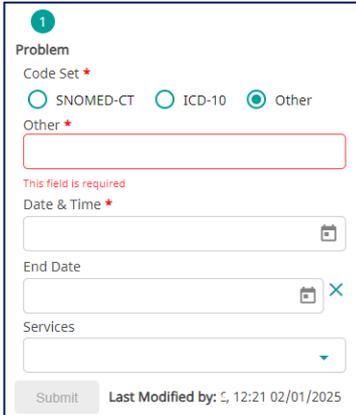


Add a Problem

A list of issues that a person identifies they are dealing with at that point in time are Problems, which may be active or inactive.

A problem is something that is being experienced at that point in time and though may lead to a diagnosis is not necessarily a diagnosis i.e. anxiety due to a stressful situation does not necessarily lead to a clinical diagnosis of some form of anxiety. Alternatively, one diagnosis may be indicated by many problems i.e shortness of breath, & wheezing may be the problems that indicate asthma.

1. From the **Person Dashboard**, from the horizontal menu, scroll across to click on **Problems**
2. Select **Add Problem**
3. Select a **Code Set** (which could be **Other**) and enter details
4. Add a **Date & Time** for when this problem began
5. Add an **End Date** if appropriate (not mandatory)
6. Select a **Service** if appropriate and click **Submit**



Add Diagnosis

A medical condition with a status (provisional/principal/etc) that has been defined by a medical professional with the ability to make the diagnosis.

A diagnosis may not be a problem for a person at that point in time i.e. asthma that is well managed is a diagnosis but is not a problem.

1. From the **Person Dashboard**, from the horizontal menu, scroll across to click on **Diagnoses**
2. Select **Add Diagnosis**
3. Select a **Code Set** (**SNOMED**, **DSM-IV**, **ICD-10**) and begin entering a diagnosis, then select a match
4. Select a **Type of Diagnosis** (**Principal**, **Provisional**, **Other**), and date for the diagnosis
5. Select a **Service** for the source of this Diagnosis and click **Submit**

