# Installing Patient Dashboard

## Download the Installation Package

From [www.procon.co.nz/wrpho.html](http://www.procon.co.nz/wrpho.html)

Unzip the downloaded ZIP file. It contains three folders:

* Forms
* License Update
* SQL

## If necessary, update the Medtech license to allow “PCON” forms to run

Run the executable found in the “License Update” folder. This will add “PCON” as a valid publisher code for both Advanced Form and Dynamic Forms.

## Screening Terms and Inbox Mapping

It is possible that you will need to create a new screening term to record:

* ACR
* Serum Creatinine
* eGFR
* Diabetes Foot Risk Assessment
* Retinal Screening

And you may need to map test results to these screening terms.

To create/import screening terms: Setup 🡪 Recall/Screening 🡪 Screening Terms

To map test results to screening terms: Setup 🡪 In/Outbox 🡪 Inbox Screening

*Run the SQL found in the SQL folder (“Show in-box mapping”) and ensure that every entry displayed is correctly mapped to the appropriate screening term.*

## Import the Advanced Forms

Found in the “Forms” folder.

*Setup 🡪 Advanced Forms 🡪 Advanced Forms Manager*

*Advanced Forms 🡪 Import*

* Patient Dashboard Customise WRHN
* Patient Dashboard V4 WRHN
* Procon Concepts and Coding Terms

## Check Concept Map

*Setup 🡪 Advanced Forms 🡪 Concept Map*

*Publisher = “Procon Limited”*

Check that all of the following concepts are correctly mapped:

|  |  |
| --- | --- |
| 10.2.1.1 | Blood Pressure Diastolic Value |
| 10.2.1.2 | Blood Pressure Diastolic Date |
| 10.2.10.1 | Vault Smear Outcome Code (optional – only if it exists) |
| 10.2.11.1 | CVD Risk Value |
| 10.2.11.2 | CVD Risk Value Date |
| 10.2.11.3 | CVD Risk Outcome |
| 10.2.12.1 | Retinal Screening Outcome |
| 10.2.12.2 | Retinal Screening Outcome Date |
| 10.2.12.3 | Retinal Screening Outcome Descr |
| 10.2.13.1 | Waist Circumference Value |
| 10.2.13.2 | Waist Circumference Value Date |
| 10.2.14.1 | Diabetes Foot Risk Outcome |
| 10.2.14.2 | Diabetes Foot Risk Date |
| 10.2.14.3 | Diabetes Foot Risk Outcome Descr |
| 10.2.15.1 | hbA1c Value |
| 10.2.15.2 | hbA1c Value Date |
| 10.2.16.1 | ACR Value |
| 10.2.16.2 | ACR Value Date |
| 10.2.17.1 | eGFR Value |
| 10.2.17.2 | eGFR Value Date |
| 10.2.18.1 | Serum Creatinine Value |
| 10.2.18.2 | Serum Creatinine Value Date |
| 10.2.19.1 | LDL Value (optional – only if it exists) |
| 10.2.19.2 | LDL Value Date (optional – only if it exists) |
| 10.2.2.1 | Blood Pressure Systolic Value |
| 10.2.22.1 | Mammography Outcome |
| 10.2.3.1 | Height Value |
| 10.2.3.2 | Height Value Date |
| 10.2.4.1 | Weight Value |
| 10.2.4.2 | Weight Value Date |
| 10.2.5.1 | BMI Value |
| 10.2.6.1 | Alcohol Units Per Week Value (optional – only if it exists) |
| 10.2.6.2 | Alcohol Units per Week Date (optional – only if it exists) |
| 10.2.7.1 | CX Outcome Code |
| 20.7.1 | B4School Outcome |
| 20.7.2 | B4School Outcome Date |
| 20.7.3 | B4School Outcome Description |

*Exit Medtech and then sign in again.*

## Check and Update Customisation

Change the patient on the palette to the patient “Patient Dashboard”.

Run the form “Patient Dashboard Customise”.

Check that outcome codes are correctly set to “Normal”, “Abnormal”, “Excluded”, “Ignored” or “Declined” for the following entries.

Note that if they are wrong they must be changed within the definition of the screening term itself (other than for “Declined” which is set in the customisation form).

* Alcohol Consumption
* B4School
* Cervical Screening
* Vault Smear (if defined)
* CVD Risk
* Diabetes Screening
* Mammography
* Diabetes Annual Review
* Advance Care Plan

## Turn on Version 4 (when ready)

* Setup 🡪 Reference Nos…
* “Documents” tab.
* Set “Dashboard Form” as required.

Note that you can switch back to version 3 in the same manner if necessary.