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# Installing Patient Dashboard V4

## 1. Download the Installation Package

From [www.procon.co.nz/hpho.htm](http://www.procon.co.nz/hpho.htm)

Unzip the downloaded ZIP file. It contains four folders:

* Forms
* License Update
* SQLs
* Screening Terms

## 2. 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.

## 3. Screening terms and in-box mapping

Ensure that screening terms exist for:

* Albumin Creatinine Ratio
* Bowel Screening Programme (will need to import standard “BSP” screening term)
* Diabetes Foot Risk Assessment
* eGFR
* Retinal Screening
* Serum Creatinine

Two SQLs are available (in the SQL folder) to assist you:

* “Show Recent Test Results and Mapping” will display everything that is currently mapped – this helps you identify screening terms currently in use at this practice
* “Check Test Result Mapping” will display the current mapping for eGFR, Serum Creatinine, and Urine ACR – every entry listed should be mapped to the correct screening term.

## 4. Import the Advanced Forms

Found in the “Forms” folder.

*Setup 🡪 Advanced Forms 🡪 Advanced Forms Manager*

*Advanced Forms 🡪 Import*

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

*Exit Medtech and sign in again.*

## 5. Check Concept Map

*Setup 🡪 Advanced Forms 🡪 Concept Map*

*Publisher = “Procon Limited”*

Check that all concepts are correctly mapped. The following concepts are particularly important:

|  |  |  |
| --- | --- | --- |
| 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 Description |  |
| 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 Description |  |
| 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 |  |
| 10.2.19.2 | LDL Value Date |  |
| 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 |  |
| 20.4.1 | Diabetes Annual Review Outcome | (optional - only if used) |
| 20.4.2 | Diabetes Annual Review outcome Date | (optional – only if used) |
| 20.9.1 | Bowel Screening Programme Outcome |  |
| 20.9.2 | Bowel Screening Programme Outcome Date |  |
| 20.9.3 | Bowel Screening Programme Outcome Description |  |

Other concepts that do not appear in the above list may be left unmapped as they are used in other versions of Patient Dashboard and/or other forms.

*Exit Medtech and then sign in again.*

## 6. Check and Update Customisation

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

Run the form “Patient Dashboard Customise V4”.

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

Note:

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).

“Declined” should have an outcome indicator of “Invalid”.

* Alcohol Consumption
* Cervical Screening
* CVD Risk
* Diabetes Annual Review (if implemented)
* Diabetes Screening
* Mammography
* Vault Smear (if defined)

## 7. Training Checklist

* The new diabetes management section.
* Any newly mapped results.
* Foot Risk Assessment
* Retinal Screening
* Lifestyle Advice
* Bowel screening.
* Highlighting classifications to make them appear on dashboard.
* Quick Links
* Adding your own notes.

## 8. For the practice manager

* How to customise Patient Dashboard.
* How to turn on Patient Dashboard for individual staff members.
* The toolbar button for those who don’t want it on all the time.

## 8. Turn on version 4 (when ready):

(You can manually run version 4 [Shift-F3 to run a new form] for testing).

* Setup 🡪 Reference Nos…
* “Documents” tab
* Change the dashboard form to the new version.

(You can just as easily switch back to version 3 if necessary).