



# Whānau Tahi User Guide

## How to get Help?

HealthAlliance provides Whanau Tahi Connected Care support during business hours (0800 - 1700hrs)  
They can be contacted on **0800 268 626** or [sharedcare@healthalliance.co.nz](mailto:sharedcare@healthalliance.co.nz)

## How to Create, Run and Finalise a Case Conference (MDT) Meeting

Creation of a MDT Meeting/Case Conference is only done by the person who is the **Administrator** of that meeting.

<p><b>Only MDT Administrators</b> can create a Case Conference (MDT) Meeting</p> <p>Select <b>My Case Conference Portal</b> from the top right of your screen</p>	<p><b>Stilwell, Glenys</b> Settings Help User Manual About My Case Conference Portal ← Log Out</p>
<p>Select the <b>Create New MDT</b> button</p>	<p><b>MDT Administration</b></p> <p>Create New MDT ←</p>
<p><b>Complete each field</b> Any fields with asterisks* must be completed</p> <p><b>Name:</b> Consider that you may be running future meetings and develop a standard naming convention so you and your MDT participants can easily identify the correct MDT form the list of all MDTs in your area. The following conventions should be used</p> <p><b>Description:</b></p> <p><b>Facility:</b> This should be your own facility. Begin by typing the name of the facility. It should appear in a drop down menu. Make sure this is YOUR facility and then select it/</p> <p><b>Meeting Location:</b> Both a <b>physical location</b> (e.g. Hukerenui Room or Poutu Road Family Practice) and a <b>Zoom Meeting link</b> for a virtual meeting (e.g. <a href="https://zoom.us/j/3366213">https://zoom.us/j/3366213</a>) can be added into the meeting location field.</p> <p> <b>Adding a Zoom link</b></p> <p>Open and sign in to <b>Zoom</b></p> <p>Select <b>'Schedule'</b></p> <p>Select the correct time, date and duration for the meeting</p> <p>If you are creating a <b>recurring meeting</b> (e.g. a monthly MDT with the same participants at the same day and time each month) make sure <b>Recurring Meeting</b> is ticked</p> <p>Under <b>Options</b> ensure that <b>Enable join before host</b> is ticked</p> <p>Ensure the calendar/scheduling software you use is selected</p> <p>Click <b>Schedule</b> at the bottom of the screen</p>	<p><b>CREATE MULTI-DISCIPLINARY TEAM (MDT)</b> ✕</p> <p><b>Name *</b> Glenyss' Test Meeting 1</p> <p><b>Description</b> AH+ Locality Meeting - Manukau</p> <p><b>Facility *</b> Regional Shared Care</p> <p><b>Meeting Location *</b> Meeting Rm 3, Fisher Place ✕</p> <p><b>New Patients Limit *</b> 3</p> <p><b>Participants *</b>   Lucy Hall   Karen Long   Deborah Ross   Add Participant</p> <p>Close Save</p>



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Once the **Zoom Meeting** has been scheduled, a calendar invite will be created for the MDT with a **URL link**.

View the calendar invite and find the **Zoom URL link**

Copy and paste the entire **Zoom URL link** into the **Meeting Location** field

CREATE MULTI-DISCIPLINARY TEAM (MDT)

Name \*

Description

Facility \*

Meeting Location \*

New Patients Limit \*

Participants \*

[Add Participant](#)

**New Patients Limit:** If you are planning to run a MDT for one patient, you will set the limit at ONE and you will **not** be inviting your MDT participants to add any of their own cases for discussion.

If you are running a MDT to discuss multiple cases, you will set the **'New Patient Limit'** at the number of cases you would like to discuss in the time you have allocated for the MDT Meeting.

Once you have determined the patient limit, you can invite the MDT participants.

**Participants:** Begin typing in the **first and surnames** of those you would like to invite to the Meeting to find the participants for the MDT. Participants may be part of a patient's named care team. Specialist(s) can also be added, if required.

Select **Add Participant** to enter them as a MDT member.

CREATE MULTI-DISCIPLINARY TEAM (MDT)

Name \*

Description

Facility \*

Meeting Location \*

New Patients Limit \*

Participants \*

[Add Participant](#)

Once all participants are added Click **Save**

## To set the meeting day(s)

Click on the name of the MDT to open it

Click the **Calendar** icon

MDT NAME	FACILITY	NEW PATIENTS LIMIT	MEETING LOCATION
Complex Renal	Respiratory ADHB	4	Meeting Room 6, level 3
Glenyss' Test Meeting 1	Regional Shared Care	3	Meeting Rm 3, Fisher Place
Description		Participants	
AH+ Locality Meeting - Manukau		Lucy Hall Karen Long Deborah Ross	
Respiratory Community Teams	Respiratory ADHB	1	Public Health Room, L2, 158 Gt South Rd
Test MDT	Regional Shared Care	4	test rm
Waiuku	Unichem Waiuku Pharmacy	4	Waiuku

1 - 5 of 5 items



# Whānau Tahi User Guide

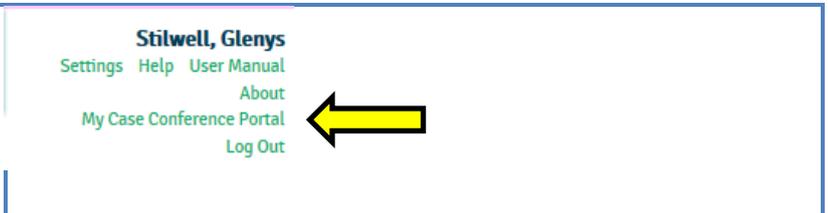
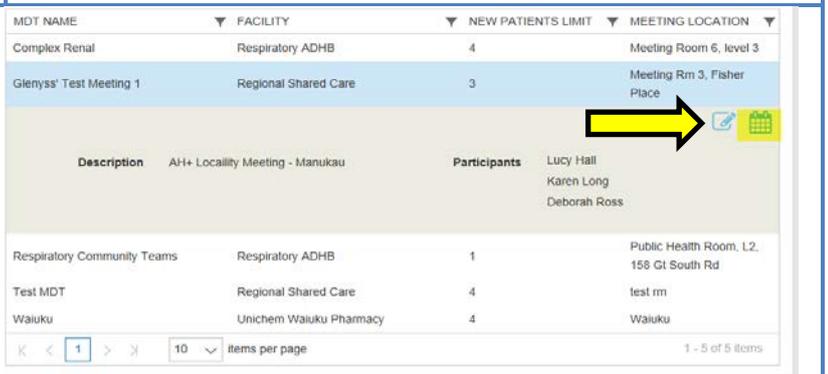
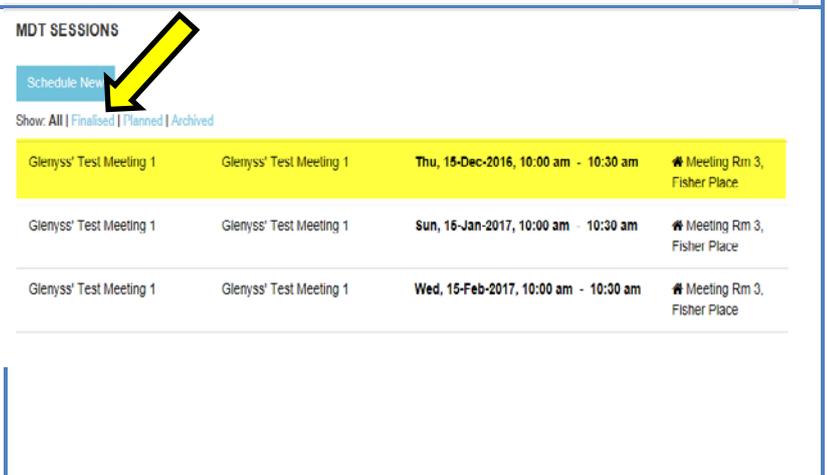
<p>Click <b>Schedule New</b></p>	<p><b>MDT DETAIL</b></p> <p><a href="#">Edit</a></p> <table border="0"> <tr> <td><b>Name</b></td> <td>Glenyss' Test Meeting 1</td> <td><b>Description</b></td> <td>AH+ Locality Meeting - Manukau</td> </tr> <tr> <td><b>Meeting Location</b></td> <td>Meeting Rm 3, Fisher Place</td> <td><b>New Patients Limit</b></td> <td>3</td> </tr> <tr> <td><b>Facility</b></td> <td>Regional Shared Care</td> <td><b>Participants</b></td> <td> <input type="text" value="Lucy Hall"/>  <input type="text" value="Karen Long"/>  <input type="text" value="Deborah Ross"/> </td> </tr> </table> <p><b>MDT SESSIONS</b></p> <p><a href="#">Schedule New</a></p>	<b>Name</b>	Glenyss' Test Meeting 1	<b>Description</b>	AH+ Locality Meeting - Manukau	<b>Meeting Location</b>	Meeting Rm 3, Fisher Place	<b>New Patients Limit</b>	3	<b>Facility</b>	Regional Shared Care	<b>Participants</b>	<input type="text" value="Lucy Hall"/> <input type="text" value="Karen Long"/> <input type="text" value="Deborah Ross"/>
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<p><b>Case Conferencing</b> works like Outlook recurring meetings.</p> <p>To book a <b>recurring MDT Meeting</b>:</p> <ul style="list-style-type: none"> <li>Select the parameters you want in each field</li> <li>Your <b>recurring Zoom</b> link will also remain valid for every scheduled MDT session</li> <li>Click <b>Save</b></li> </ul>	<p><b>SCHEDULE NEW SESSION</b> <span>✕</span></p> <p><b>Name *</b> <input type="text" value="Glenyss' Test Meeting 1"/></p> <p><b>Location *</b> <input type="text" value="Meeting Rm 3, Fisher Place"/></p> <p><b>Start *</b> <input type="text" value="22/11/2016"/> <input type="text" value="10:00 AM"/></p> <p><b>End *</b> <input type="text" value="22/11/2016"/> <input type="text" value="10:30 AM"/></p> <p><b>Recurrence *</b> <input type="text" value="Monthly"/></p> <p><b>Repeat every:</b> <input type="text" value="1"/> month(s)</p> <p><b>Repeat on:</b> <input checked="" type="radio"/> Day <input type="text" value="15"/> <input type="text" value="first"/> <input type="text" value="Tuesday"/></p> <p><b>End:</b> <input checked="" type="radio"/> After <input type="text" value="3"/> occurrence(s) <input type="radio"/> On <input type="text" value="15/11/2016"/></p> <p><a href="#">Cancel</a> <a href="#">Save</a></p>												



# Whānau Tahi User Guide

## How to Finalise a Case Conference (MDT) Meeting

Finalising of MDT/Case Conference is only done by the person who is the Administrator/Organiser of that meeting. Once the meeting has been scheduled, the patient(s) booked into the meeting and the participants allocated that the meet

<p>Only <b>MDT Administrators</b> can finalise a MDT Meeting / Case Conference</p> <p>Select <b>My Case Conference Portal</b> from the top right of your screen</p>																																	
<p>Find the correct <b>MDT</b></p> <p>Select the <b>Calendar</b> icon to open all instances of the MDT (if this is ONE OFF MDT, only ONE instance will be available)</p>	 <table border="1"> <thead> <tr> <th>MDT NAME</th> <th>FACILITY</th> <th>NEW PATIENTS LIMIT</th> <th>MEETING LOCATION</th> </tr> </thead> <tbody> <tr> <td>Complex Renal</td> <td>Respiratory ADHB</td> <td>4</td> <td>Meeting Room 6, level 3</td> </tr> <tr> <td>Glenyss' Test Meeting 1</td> <td>Regional Shared Care</td> <td>3</td> <td>Meeting Rm 3, Fisher Place</td> </tr> <tr> <td colspan="2">Description</td> <td>Participants</td> <td></td> </tr> <tr> <td colspan="2">AH+ Locality Meeting - Manukau</td> <td>Lucy Hall Karen Long Deborah Ross</td> <td></td> </tr> <tr> <td>Respiratory Community Teams</td> <td>Respiratory ADHB</td> <td>1</td> <td>Public Health Room. L2. 158 Gt South Rd</td> </tr> <tr> <td>Test MDT</td> <td>Regional Shared Care</td> <td>4</td> <td>test rm</td> </tr> <tr> <td>Waiuku</td> <td>Unichem Waiuku Pharmacy</td> <td>4</td> <td>Waiuku</td> </tr> </tbody> </table>	MDT NAME	FACILITY	NEW PATIENTS LIMIT	MEETING LOCATION	Complex Renal	Respiratory ADHB	4	Meeting Room 6, level 3	Glenyss' Test Meeting 1	Regional Shared Care	3	Meeting Rm 3, Fisher Place	Description		Participants		AH+ Locality Meeting - Manukau		Lucy Hall Karen Long Deborah Ross		Respiratory Community Teams	Respiratory ADHB	1	Public Health Room. L2. 158 Gt South Rd	Test MDT	Regional Shared Care	4	test rm	Waiuku	Unichem Waiuku Pharmacy	4	Waiuku
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<p>Select the specific MDT meeting you wish to finalise</p> <p>Click on <b>Finalised</b></p> <p>Once a meeting is <b>Finalised</b> the participants will receive an email notification with an invitation to participate in the MDT</p> <p>Any other patients cannot be added to the MDT once it has been <b>Finalised</b></p> <p>Outcomes for the MDT Meeting can only be recorded <b>AFTER</b> a meeting is Finalised</p>	 <p><b>MDT SESSIONS</b></p> <p>Schedule New</p> <p>Show: All   Finalised   Planned   Archived</p> <table border="1"> <tbody> <tr> <td>Glenyss' Test Meeting 1</td> <td>Glenyss' Test Meeting 1</td> <td>Thu, 15-Dec-2016, 10:00 am - 10:30 am</td> <td>Meeting Rm 3, Fisher Place</td> </tr> <tr> <td>Glenyss' Test Meeting 1</td> <td>Glenyss' Test Meeting 1</td> <td>Sun, 15-Jan-2017, 10:00 am - 10:30 am</td> <td>Meeting Rm 3, Fisher Place</td> </tr> <tr> <td>Glenyss' Test Meeting 1</td> <td>Glenyss' Test Meeting 1</td> <td>Wed, 15-Feb-2017, 10:00 am - 10:30 am</td> <td>Meeting Rm 3, Fisher Place</td> </tr> </tbody> </table>	Glenyss' Test Meeting 1	Glenyss' Test Meeting 1	Thu, 15-Dec-2016, 10:00 am - 10:30 am	Meeting Rm 3, Fisher Place	Glenyss' Test Meeting 1	Glenyss' Test Meeting 1	Sun, 15-Jan-2017, 10:00 am - 10:30 am	Meeting Rm 3, Fisher Place	Glenyss' Test Meeting 1	Glenyss' Test Meeting 1	Wed, 15-Feb-2017, 10:00 am - 10:30 am	Meeting Rm 3, Fisher Place																				
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# Whānau Tahi User Guide

## How to Book a patient into a Case Conference (MDT) Meeting

All Shared Care users can book a patient into a Case Conference.

Open the patient's Shared Care record

From the left menu select **Case Conference**

Select **Book Patient into MDT Meeting**

---

**Select the MDT**

**Select the MDT Meeting**

Note - If a meeting is fully booked - that is, the maximum number of patients for discussion has been reached - the meeting will be **greyed out**. You can then select the next available MDT Meeting in the schedule.

Type in the **Reason for Consideration**

The Presenter field automatically populates with the Users name. This should be changed if they are not going to be the Presenter during the actual MDT Meeting.

The option to tick the box **Request Earlier Slot** relates to recurring MDT Meetings. It allows a MDT participant to request that a case be added to an earlier MDT Meeting, even if those meetings already have the maximum number of cases for discussion. The MDT Administrator will receive and consider the request. They may move a less urgent case to a later MDT to accommodate a more urgent case. This should be done in discussion with the MDT participants

The option to tick the box **Patient has consented for inclusion in this case conference** is also an optional but important part of the MDT process. Patients' should provide their **VERBAL** consent to be discussed in a MDT Meeting.

To confirm that a patient has consented, tick the **Patient has consented for inclusion** box.

Click **Book Now**

---

The Booked Meeting will now display

MDT	Meeting	Meeting Date	Status
Glenyss' Test Meeting 1	Glenyss' Test Meeting 1	Thu, 15/12/2016, 10:00 AM	Planned

1 - 1 of 1 items



# Whānau Tahi User Guide

## How to View and Record Outcomes for a Case Conference (MDT) Meeting

Select **My Case Conference Portal** from the top right of your screen

**Stilwell, Glenys**  
Settings Help User Manual  
About  
**My Case Conference Portal** ←  
Log Out

Select the **correct MDT Meeting**

Mark your attendance in the **Participants** Section (at the bottom of the page)

Click on the patient name to view the **Reason for Consideration**

Click on **View Summary** to see the Care Record **Snapshot Summary** for the patient

At the end of the clinical discussion, type the **Case Conference Outcome** into the free text field (directly under the heading Case Conference Outcome)

Only **one person** should be nominated to write the Outcomes per patient. The **Case Conference Outcome** field **AUTOSAVES** as you type into it

Whānau Tahi Case Conference About ↑ Stilwell, Glenys Logout

>> **Glenys' Test Meeting 1** Finalised

Sun, 16-Jan-2017, 10:00 am - 10:30 am  
Patient Limit: 3

→ Accept Decline Tentative

**PATIENTS**

PATIENT NAME	NHI	TYPE
Patrick Ambers	BCA8776	New
Angela Anderson	EVT9331	New
Uesifili Allen	LUX8873	New

Presenter: Lucy Hall Consented

**Reason For Consideration:** ←  
Very sick

**Case Conference Outcome** ←  
Rebook for next time to review

View Summary

K < 1 > X 1 - 3 of 3 items

**PARTICIPANTS**

Lucy Hall (MDT Participant)	Invited
Karen Long (MDT Participant)	Invited
Deborah Ross (MDT Participant)	Invited
Glenys Stilwell (MDT Participant)	Accepted

**Case Conference Outcomes** for each patient will be viewable in the main patient record, both in the **Case Conference** menu and the **Recent Activities** menu in Whānau Tahi

**This Patient** ↑

- Overview
- Recent Activities**

**Summary**

Date: 16. Nov 2016; User: Glenys Stilwell

Outcome for MDT - Glenys' Test Meeting 1 is added. Modified Date: 16-Nov-2016



# Whānau Tahi User Guide

## How to Reschedule a Patient into another Case Conference (MDT) Meeting

Only **MDT Administrators** can reschedule a patient into another **Case Conference (MDT) Meeting**

With the **MDT meeting** open, select **Schedule Another Session**

Rebook the patient into another session as outlined above

The screenshot shows a software interface for a Case Conference Outcome. At the top, there is a text input field containing the text "Rebook for next time to review". Below this field is a horizontal row of three buttons: "View Summary", "Remove From Session", and "Schedule Another Session". A yellow arrow points to the "Schedule Another Session" button.