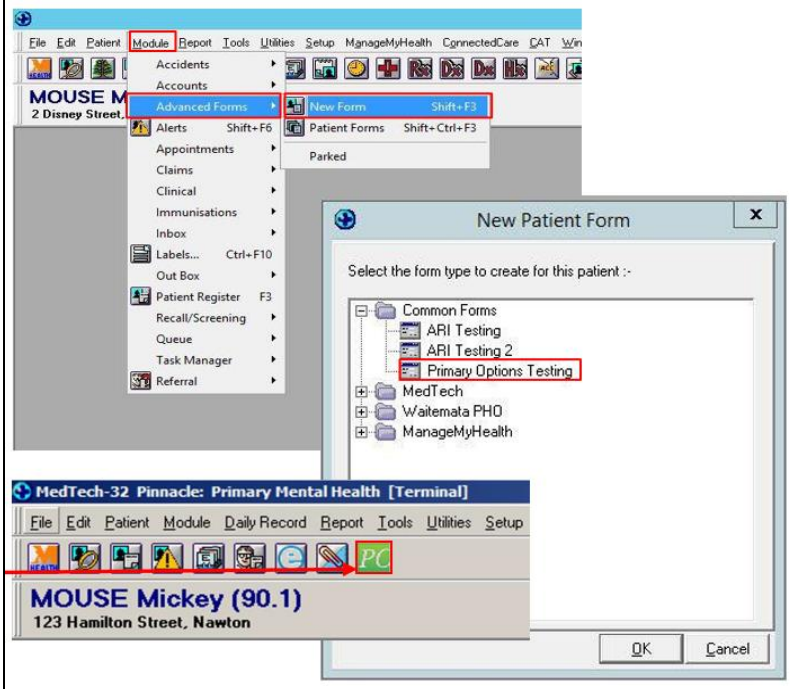
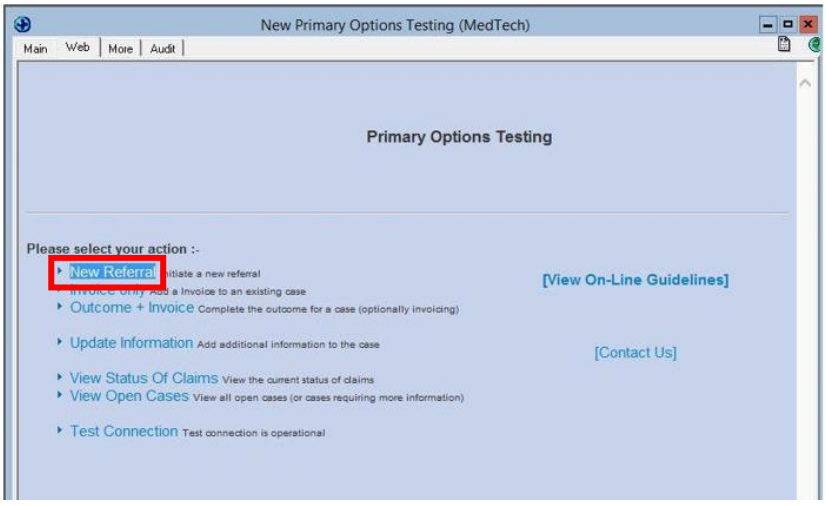
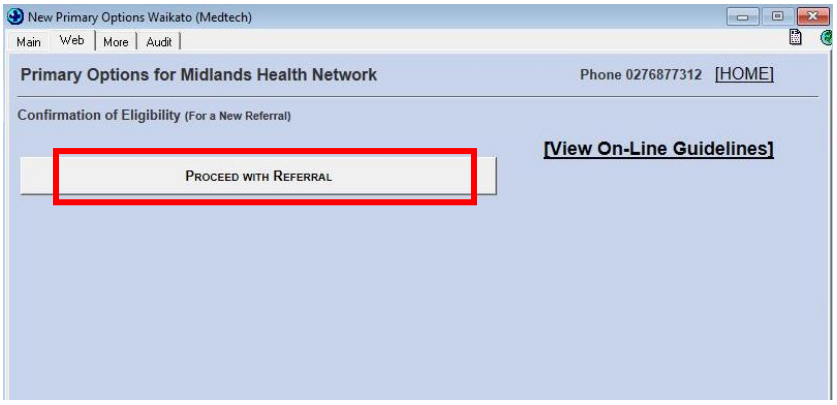
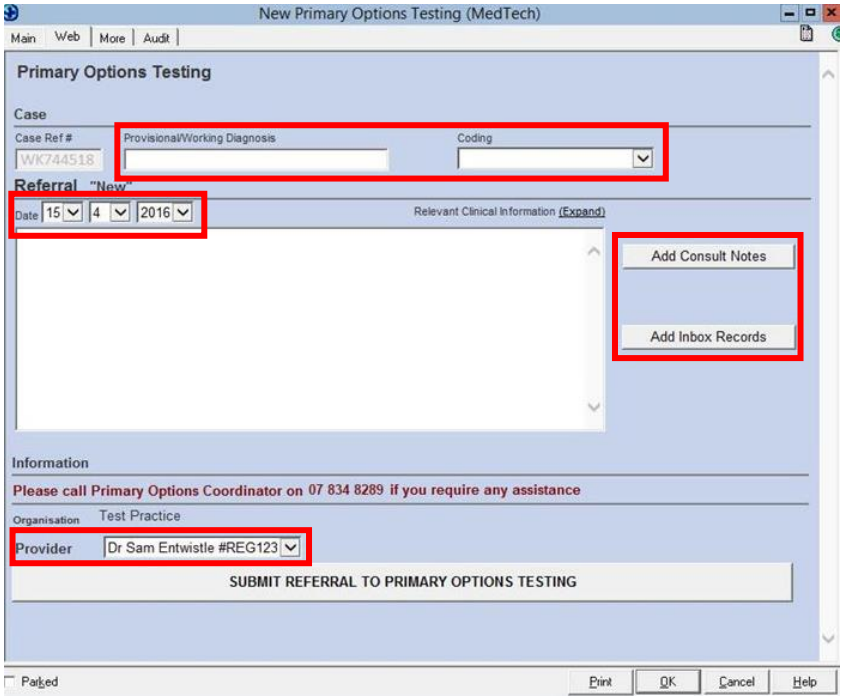
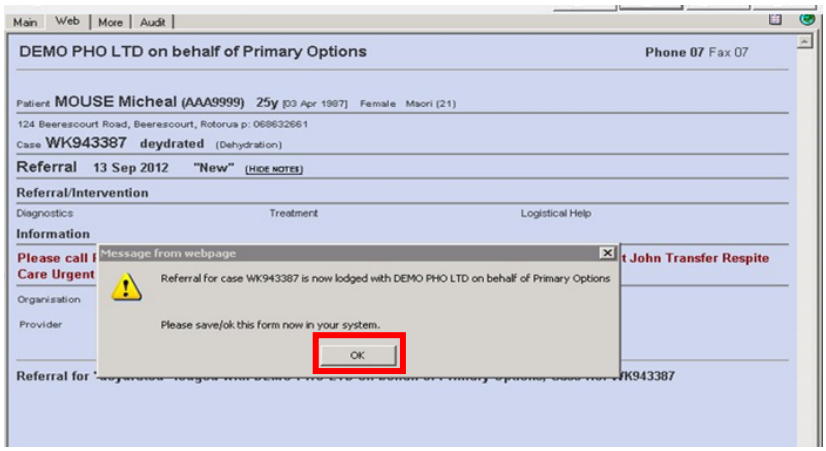
ONE POINT LESSON

How to lodge a Primary Options referral

1.	Initiate Primary Options - Ensure you have the correct patient on the palette. - click on Module, Advanced Form, New Form (shift F3) - Highlight MHN Primary Options - click OK Alternatively: if you have the Primary Options MedTech button installed and placed on your toolbar you may click this and skip 'Step 1'	
2.	Click 'New Referral'	

3.	Confirm Eligibility by clicking on the 'Proceed with Referral' button NB: The link to View online guidelines does not work. To access information on all Primary Option programmes please go to www.pinnaclepractices.co.nz and click on programmes and your region.	
4.	- Type in the 'Provisional/ Working Diagnosis' - select the appropriate 'Coding' - Change the 'Date' to the date of service/consult - attach all consultation notes relating to the referral in the text box provided by copying and pasting or clicking on 'Add Consult Notes' & 'Add Inbox Records' to auto populate this information – please be aware the most recent notes populate first so you may need to press the button multiple times for the appropriate notes to populate, and then delete the notes you do not wish to submit. - Select the correct 'Provider' from the drop down menu - click Submit Referral	
5.	Click OK to save the form in MedTech. Click OK to exit/close form NB: If you X out of the pop-up box the referral will not write back to the inbox record.