

# TOITŪ TAKATA FORM

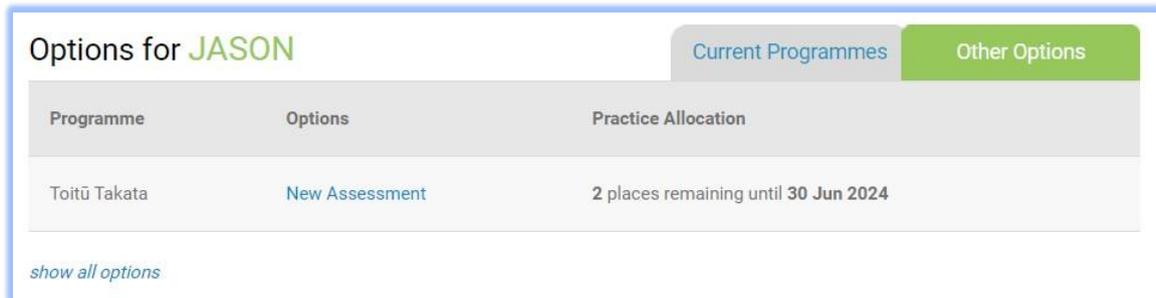
## USER GUIDE

## WEB PORTAL:

Menus:

- Other Options

The programme is available through the 'Other Options' menu. This menu section also shows allocation available to the practice.

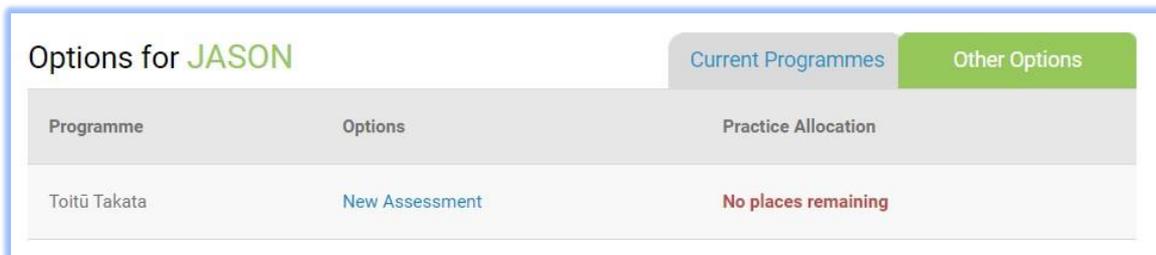


The screenshot shows the 'Options for JASON' interface. At the top, there are two tabs: 'Current Programmes' and 'Other Options', with 'Other Options' selected. Below the tabs is a table with three columns: 'Programme', 'Options', and 'Practice Allocation'. The table contains one row for 'Toitū Takata' with 'New Assessment' as the option and '2 places remaining until 30 Jun 2024' as the practice allocation. A 'show all options' link is located at the bottom left of the table area.

Programme	Options	Practice Allocation
Toitū Takata	<a href="#">New Assessment</a>	2 places remaining until 30 Jun 2024

[show all options](#)

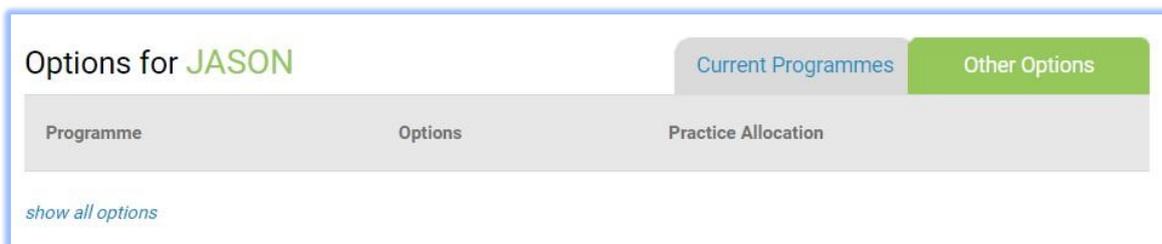
If not allocations are available, a warning message will appear. The assessment can still be completed – if funded, the assessment will be rejected; if unfunded, the assessment will be accepted.



The screenshot shows the 'Options for JASON' interface. At the top, there are two tabs: 'Current Programmes' and 'Other Options', with 'Other Options' selected. Below the tabs is a table with three columns: 'Programme', 'Options', and 'Practice Allocation'. The table contains one row for 'Toitū Takata' with 'New Assessment' as the option and 'No places remaining' as the practice allocation.

Programme	Options	Practice Allocation
Toitū Takata	<a href="#">New Assessment</a>	No places remaining

If the patient is under 14 years of age, the programme will not show for the patient.

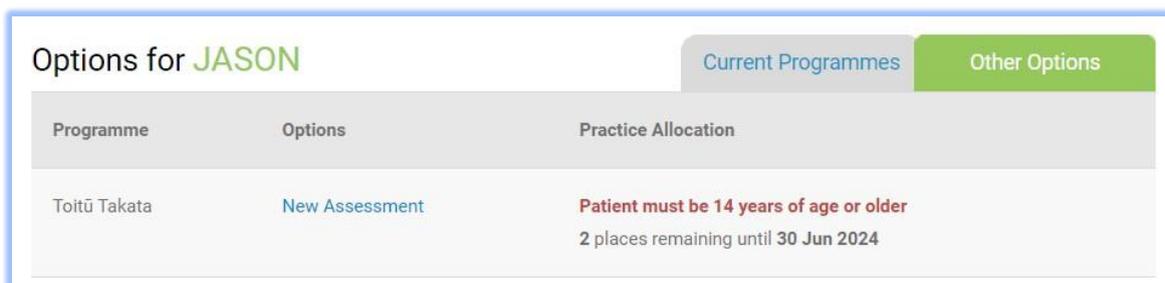


The screenshot shows the 'Options for JASON' interface. At the top, there are two tabs: 'Current Programmes' and 'Other Options', with 'Other Options' selected. Below the tabs is an empty table with three columns: 'Programme', 'Options', and 'Practice Allocation'. A 'show all options' link is located at the bottom left of the table area.

Programme	Options	Practice Allocation
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[show all options](#)

This programme can be accessed using the 'show all options' link. A warning message will be displayed regarding the patient's age, and the assessment will be rejected if submitted.



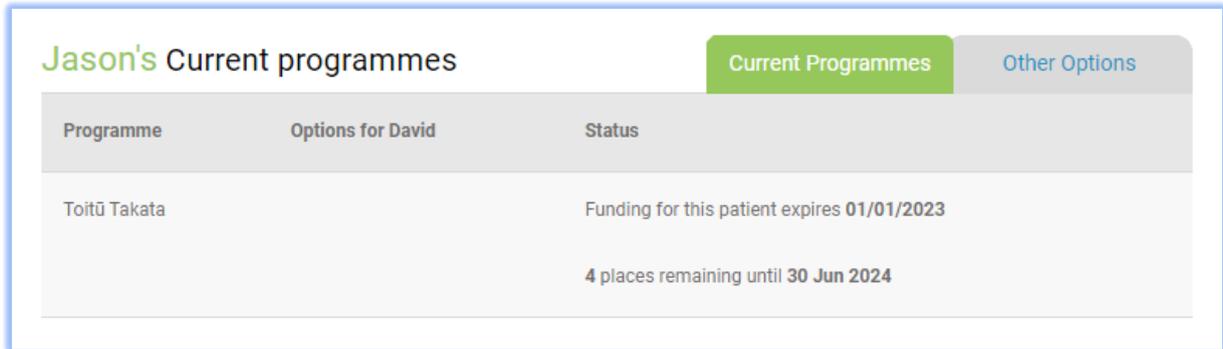
The screenshot shows the 'Options for JASON' interface. At the top, there are two tabs: 'Current Programmes' and 'Other Options', with 'Other Options' selected. Below the tabs is a table with three columns: 'Programme', 'Options', and 'Practice Allocation'. The table contains one row for 'Toitū Takata' with 'New Assessment' as the option and a warning message: 'Patient must be 14 years of age or older' followed by '2 places remaining until 30 Jun 2024'.

Programme	Options	Practice Allocation
Toitū Takata	<a href="#">New Assessment</a>	<b>Patient must be 14 years of age or older</b> 2 places remaining until 30 Jun 2024

- Current Programmes

If the patient had an assessment in the last 18 months, the programme summary will appear in the 'Current Programmes' menu.

The section will show the funding expiration date for the patient, and the current allocation for the practice.

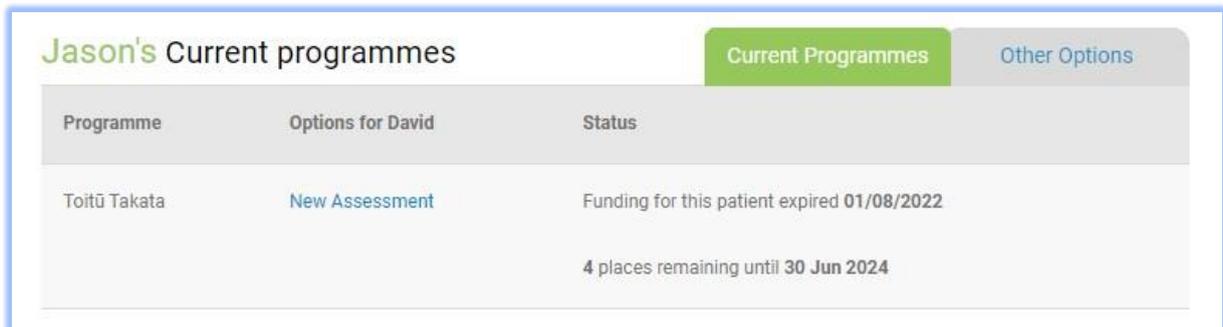


The screenshot shows a web interface titled "Jason's Current programmes". It has two tabs: "Current Programmes" (active) and "Other Options". Below the tabs is a table with three columns: "Programme", "Options for David", and "Status".

Programme	Options for David	Status
Toitū Takata		Funding for this patient expires <b>01/01/2023</b>  4 places remaining until <b>30 Jun 2024</b>

If the programme is active (performed in the last 12 months), the link for a new assessment will be hidden (but can be revealed using the 'show all options' link).

Once the patients funding has expired, the link for a new assessment will automatically appear in the menu section.



The screenshot shows the same web interface as above, but the funding has expired. The "Status" column now says "Funding for this patient expired 01/08/2022". A "New Assessment" link has appeared in the "Options for David" column.

Programme	Options for David	Status
Toitū Takata	<a href="#">New Assessment</a>	Funding for this patient expired <b>01/08/2022</b>  4 places remaining until <b>30 Jun 2024</b>

Form:

- Provider tab

The 'Funded Assessment' flag is located on this tab.

If set to 'Yes', all funding business rules will apply (allocations) and an invoice will be raised in a PMS.

If set to 'No', funding business rules will not apply and no invoice will be raised.

The screenshot shows the 'Toitū Takata Assessment' form with the 'Provider' tab selected. The 'Provider Details' section includes a 'Provider' dropdown menu set to 'Please Specify', a 'Payee' dropdown menu set to 'Lumsden Medical Centre', a 'Funded Assessment' dropdown menu set to 'Yes', and an empty 'Invoice Number' field. At the bottom, there are three buttons: 'Submit Claim' (blue), 'Cancel' (grey), and 'Park Form' (orange).

- Claim Details tab

The form is 'locked down' by default – all extra tabs will be hidden, and no eligibility criteria can be changed. To 'unlock' the form, the 'Patient is not permanently residing in an aged care facility' check must be ticked.

The screenshot shows the 'Toitū Takata Assessment' form with the 'Claim Details' tab selected. The 'Claim Date' is set to '08/12/2023'. Below this, there is a link for '- WellSouth LTC resources'. The 'Eligibility Criteria' section is highlighted in red and contains a checkbox for 'Patient is not permanently residing in an aged care facility'. Below this, there are two columns of checkboxes: 'Demographics' (Māori, Pacific People, Quintile 5, CSC Holder, HUHC Holder, Former Refugee, Newly diagnosed with an LTC) and 'Long Term Condition(s)' (Cardiovascular, Diabetes, Gout, Respiratory, Stroke, Other). The 'AND' and 'OR' labels are positioned between the columns. At the bottom, there is a checkbox for 'Severe and enduring mental illness / Addiction'.

PLEASE NOTE: the Demographics, Long-term conditions, and ‘Severe and enduring mental illness/ Addiction’ checkboxes will be automatically populated for a patient when using a PMS. However, this information should be vetted and updated if incorrect.

Ticking any of the ‘Long Term Conditions’ checkboxes, and the ‘Severe and enduring mental illness/ Addiction’ checkbox reveal 1 or more related tabs.

Cardiovascular:

- *Cardiovascular/Stroke* tab

Diabetes:

- *Diabetes* tab
- *Cardiovascular/Stroke* tab

Gout:

- *Gout* tab

Respiratory:

- *Respiratory* tab

Stroke:

- *Cardiovascular/Stroke* tab

Other:

- *Other LTC* tab

Severe and enduring mental illness/

Addiction:

- *Mental Illness/Addiction* tab

## Self Assessment Tab

Choose one self assessment to complete with the patient.

Each questionnaire is presented in a modal window and is revealed when clicking the appropriate green questionnaire button.

## Toitū Takata Assessment

[Patient](#)
[Provider](#)
[Claim Details](#)
[Self Assessment](#)
[Circle of Care](#)
[Plans](#)
[Observations](#)

[Cardiovascular/Stroke](#)
[Diabetes](#)
[Respiratory](#)
[Notes](#)
[Additional Support](#)

Select, with the patient, the most appropriate self-assessment tool \*

- Self-assessment Tool resources

<p>Hua Oranga <sup>?</sup></p> <p><b>Questionnaire</b></p>	<p>Taha Tinana / Physical Health <input type="checkbox"/></p> <p>Taha Wairua / Spiritual Health <input type="checkbox"/></p> <p>Taha Whānau / Family Health <input type="checkbox"/></p> <p>Taha Hinengaro / Mental Health <input type="checkbox"/></p>	<p>DUKE <sup>?</sup></p> <p><b>Questionnaire</b></p>	<p>Physical Health <input type="text" value="50"/></p> <p>Mental Health <input type="text" value="60"/></p> <p>Social Health <input type="text" value="70"/></p> <p>Total Score <input type="text" value="60.0"/></p>
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Once completed and saved, the appropriate value(s) will be updated in the form.

NOTE: These fields can also be manually updated without using the questionnaires.

NOTE: The Duke and Hua Oranga assessment are only validated for those over the age of 18yrs. If your patient is under 18yrs of age then these assessments will 'grey out' and will not be required to complete the form.

### Circle of Care tab

All the data on this tab is optional and can be completed if required.

## Toitū Takata Assessment

[Patient](#)
[Provider](#)
[Claim Details](#)
[Self Assessment](#)
[Circle of Care](#)
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[Observations](#)

[Cardiovascular/Stroke](#)
[Diabetes](#)
[Respiratory](#)
[Notes](#)
[Additional Support](#)

Record the "circle of care" for this patient <sup>?</sup>

Record all that apply

<p>Māori Provider</p> <p><input type="text" value="Please specify"/> <input type="checkbox"/></p>	<p>Other Supports</p> <p><input type="text"/></p>
<p>Pacific People</p> <p><input type="text" value="Please specify"/> <input type="checkbox"/></p>	<p>Home &amp; Disability Support</p> <p><input type="text"/></p>
<p>Mental Health Support</p> <p><input type="text"/></p>	<p>Community Pharmacy</p> <p><input type="text" value="Please specify"/> <input type="checkbox"/></p>
<p>MSD / WINZ <sup>?</sup></p> <p><input type="text"/></p>	<p>Secondary Services</p> <p><input type="text"/></p>
<p>Whānau</p> <p><input type="text"/></p>	

## Plans tab

Indicate which has occurred for the patient in the last 12 months.

### Toitū Takata Assessment

Patient   Provider   Claim Details   Self Assessment   Circle of Care   **Plans**   Observations

Cardiovascular/Stroke   Diabetes   Respiratory   Notes   Additional Support

In the last 12 months has the patient:

Had a targeted care plan completed/updated and loaded onto HealthOne? \* [more info](#)    Yes    No    Personalised Care Plan  
 Acute Plan  
 Advance Care Plan

Had a specific patient action plan completed/updated? \* [more info](#)    Yes    No

Had an acute presentation at primary care, attended ED, or been hospitalised for their LTC(s)? \* [more info](#)    Yes    No

## Observations tab

The 'Height', 'Weight', 'Blood Pressure', and 'Smoking Status' are retrieved from the PMS. This data will be editable in the form.

Vaping Status will not be retrieved from the PMS and will need to be entered.

**Baseline observations:**

Height  
 cm

Weight  
 kg

Blood Pressure  
 mm Hg /  mm Hg

Smoking Status \*   Vaping Status \*

## LTC tabs

Ticking any of the 'Long Term Conditions' checkboxes, and the 'Severe and enduring mental illness/Addiction' checkbox reveal 1 or more related tabs. Tabs are revealed in the following manner:

### Cardiovascular:

- *Cardiovascular/Stroke* tab

### Diabetes:

- *Diabetes* tab
- *Cardiovascular/Stroke* tab

### Gout:

- *Gout* tab

### Respiratory:

- *Respiratory* tab

### Stroke:

- *Cardiovascular/Stroke* tab

### Other:

- *Other LTC* tab

### Severe and enduring mental illness/

### Addiction:

- *Mental Illness/Addiction* tab

Patient Provider **Claim Details** Self Assessment Circle of Care Plans Observations

Cardiovascular/Stroke Diabetes Gout Respiratory Other LTC Mental Illness / Addiction

Notes Additional Support

Claim Date  
08/12/2023  - WellSouth LTC resources

**Eligibility Criteria \* **

Patient is not permanently residing in an aged care facility

**Demographics**

- Māori
- Pacific People
- Quintile 5
- CSC Holder
- HUHC Holder
- Former Refugee
- Newly diagnosed with an LTC 

AND

**Long Term Condition(s)**

- Cardiovascular
- Diabetes
- Gout
- Respiratory
- Stroke
- Other 

OR

Severe and enduring mental illness / Addiction

- Automatic population of data from PMS

Most of the patient observations, screenings, and lab data will be populated from the PMS. If readings are considered 'too old' or are not available, warning messages will appear informing the clinician of any issues.

Lab data will not be editable in the form when using a PMS – data can only be populated from existing lab data in the PMS.

Labs:

**Cardiovascular/Stroke** – All fields populated from the PMS.

<b>Cardiovascular / Stroke</b>		<a href="#">- Cardiovascular/Stroke resources</a>	
<b>In the last 12 months has the patient:</b>			
Had a HbA1c measurement?	HbA1C	<input type="text"/> mmol/mol	No PMS records available from last 12 months
Had a lipids panel completed? 	Total Cholesterol	<input type="text"/> mmol/L	No PMS records available from last 12 months
	Triglycerides	<input type="text"/> mmol/L	No PMS records available from last 12 months
	HDL	<input type="text"/> mmol/L	No PMS records available from last 12 months
	LDL	<input type="text"/> mmol/L	No PMS records available from last 12 months
	Ratio	<input type="text"/>	
Had renal function checked?	eGFR	<input type="text"/> mL/min/1.73m <sup>2</sup>	No PMS records available from last 12 months
	ACR	<input type="text"/> mg/mmol	No PMS records available from last 12 months

**Diabetes** – All lab fields populated from the PMS. DAR, Retinal screenings, and foot check populated if available/possible, but can be manually entered if needed.

**Diabetes** - Diabetes Resources

**In the last 12 months has the patient:**

Had a HbA1c measurement?	DD/MM/YYYY <input type="text"/>	DD/MM/YYYY <input type="text"/>	DD/MM/YYYY <input type="text"/>	
	mmol/mol	mmol/mol	mmol/mol	

No PMS records available from last 12 months

Had a Diabetes Annual Review completed? <input type="checkbox"/>	DD/MM/YYYY <input type="text"/>	
Last Retinal screening <input type="checkbox"/>	DD/MM/YYYY <input type="text"/>	
Last Foot Check <input type="checkbox"/>	DD/MM/YYYY <input type="text"/>	Please specify <input type="text"/>
eGFR <input type="checkbox"/>	DD/MM/YYYY <input type="text"/>	<input type="text"/> mL/min/1.73m2
		No PMS records available from last 12 months
ACR <input type="checkbox"/>	DD/MM/YYYY <input type="text"/>	<input type="text"/>
		No PMS records available from last 12 months

**Gout** – All lab fields populated from the PMS. CVD Risk populated if available/possible but can be manually entered if needed.

**Gout** - Gout Resources

**In the last 12 months has the patient:**

Had a blood test for uric acid levels?	DD/MM/YYYY <input type="text"/>	DD/MM/YYYY <input type="text"/>	DD/MM/YYYY <input type="text"/>	
	mmol/L	mmol/L	mmol/L	

No PMS records available from last 12 months

Had a CVDRA completed?	Date	CVD Risk	
	DD/MM/YYYY <input type="text"/>	<input type="text"/>	No PMS records available from last 60 months

Had renal function checked?	ACR	eGFR	
	<input type="text"/> mg/mmol	<input type="text"/> mL/min/1.73m2	
	No PMS records available from last 12 months	No PMS records available from last 12 months	

How many Gout flare-ups has the patient had in the last 12 months? \*  flare-ups

**Severe and enduring mental illness/ Addiction** – All lab fields populated from the PMS. CVD Risk populated if available/possible but can be manually entered if needed.

**Severe and enduring mental illness / addiction** - [Mental Illness / Addiction resources](#)

In the last 12 months has the patient:

Had a CVDR completed?	Date	<input type="text" value="DD/MM/YYYY"/>	No PMS records available from last 60 months
	CVD Risk	<input type="text"/> %	
Had metabolic monitoring completed?	Total Cholesterol	<input type="text"/> mmol/L	No PMS records available from last 12 months
	Triglycerides	<input type="text"/> mmol/L	No PMS records available from last 12 months
	HDL	<input type="text"/> mmol/L	No PMS records available from last 12 months
	LDL	<input type="text"/> mmol/L	No PMS records available from last 12 months
	Ratio	<input type="text"/>	
	HbA1C	<input type="text"/> mmol/mol	No PMS records available from last 12 months

- Questionnaires

The Cardiovascular/Stroke and the Respiratory tabs contain questionnaires.

We will use the 'New York Heart Association (NYHA) Functional Classification' on the *Cardiovascular/Stroke* tab as an example. This questionnaire will update the 'Classification' field in the *Heart Failure* section of the tab.

Each questionnaire is presented in a modal window and is revealed when clicking the appropriate green questionnaire button.

**Heart Failure** - [Heart Failure resources](#)

Complete a New York Heart Association (NYHA) Functional Classification for the patient

[NYHA Functional Classification](#)

Classification \*

### New York Heart Association (NYHA) Functional Classification

- Class I **Asymptomatic** - no limitation of physical activity  
The patient does not develop undue dyspnoea, fatigue or palpitations with ordinary physical activity
- Class II **Mild symptoms** - slight limitation of physical activity  
The patient is comfortable at rest, but develops dyspnoea, fatigue or palpitations with ordinary physical activity
- Class III **Moderate symptoms** - marked limitation of physical activity  
The patient is comfortable at rest, but develops dyspnoea, fatigue or palpitations with less than ordinary physical activity
- Class IV **Severe symptoms** - unable to do any physical activity without discomfort  
The patient may have symptoms at rest and if any physical activity is undertaken, the level of discomfort is increased

Cancel Save Score

Each field in the questionnaires must be completed before it can be 'saved'.

### New York Heart Association (NYHA) Functional Classification

Classification is required

- Class I **Asymptomatic** - no limitation of physical activity  
The patient does not develop undue dyspnoea, fatigue or palpitations with ordinary physical activity
- Class II **Mild symptoms** - slight limitation of physical activity  
The patient is comfortable at rest, but develops dyspnoea, fatigue or palpitations with ordinary physical activity
- Class III **Moderate symptoms** - marked limitation of physical activity  
The patient is comfortable at rest, but develops dyspnoea, fatigue or palpitations with less than ordinary physical activity
- Class IV **Severe symptoms** - unable to do any physical activity without discomfort  
The patient may have symptoms at rest and if any physical activity is undertaken, the level of discomfort is increased

Cancel Save Score

Once completed and saved, the appropriate value(s) will be updated in the form. For this 'New York Heart Association (NYHA) Functional Classification' questionnaire, the 'Classification' will be updated upon saving the form.

### Heart Failure

[- Heart Failure resources](#)

Complete a New York Heart Association (NYHA) Functional Classification for the patient 

**Classification \***

NYHA Functional Classification      Class IV - Severe 

## Additional Support tab

Indicate what supports will be provided for the patient throughout the year.

This information is used to generate the Patient Summary.

NOTE: information written in the 'Other' field on this page will print onto the Patient Summary.

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## Toitū Takata Assessment

[Patient](#)   [Provider](#)   [Claim Details](#)   [Self Assessment](#)   [Circle of Care](#)   [Plans](#)   [Observations](#)

Cardiovascular/Stroke   Diabetes   Respiratory   [Notes](#)   [Additional Support](#)

Indicate some of the additional supports the patient will receive over the following months as part of Toitū Takata.

This is not an exhaustive list.

Complete or update care planning  
(must select at least one) \* [more info](#)

- Personalised Care Plan (HealthOne)
- Acute Plan (HealthOne)
- Advance Care Plan (HealthOne)
- Action Plan (Given to patient)

Medication Review - Clinical Pharmacist [more info](#)

Please Specify 

Connect patient with: [more info](#)

- Māori Provider
- Pacific Provider
- Access & Choice (Tōku Oranga)
- WS Dietetics
- WS Falls & Fractures
- Self-management support

Group Education / Shared Medical Appointments

Please Specify 

Inter-disciplinary team meeting

Please Specify 

Other

## Summary:

If the assessment is successfully completed, the form will display some extra information about the programme, including how much funding is available, and how the funding should be used.

This section will also contain 2 buttons allowing you to print or email the Patient Summary.

NOTE: This Patient Summary text is independent of the Assessment Summary seen on this page.

**Claim Accepted** Payment will be made by 20 Nov 2023. ×

### Toitū Takata Assessment Summary for JASON BOURNE (ZZZ0083)

You have now completed the LTC Programme enrolment form for this patient

The practice will receive \$250 for patients who are Q5, CSC, or newly diagnosed with an LTC

For patients who are Māori, Pacific, a former refugee, or have a severe and enduring mental illness / addiction the practice will receive \$300

This funding should be used to cover the costs of this visit, the last visit (which will be similar to this), at least one funded GP/NP visit. Remaining funding should be used for further funded GP/NP, or Nurse visits and the actions you have identified as part of this initial visit

Other relevant clinical programmes (e.g. Diabetes Annual Review) can be claimed alongside this funding

If you have any questions please contact your Primary Care Relationship Manager or Long-term conditions Nurse

[Print Patient Summary](#) [Email Patient Summary](#)

Claim Date	<b>31 Oct 2023</b>	Funded Assessment	<b>Yes</b>
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- Print Patient Summary

Clicking the 'Print Patient Summary' button open the 'print' window allowing you view and print the Patient Summary.

- Email Patient Summary

The Patient Summary can also be emailed to the patient by clicking the 'Email Patient Summary' button.

A modal window will appear allowing you to enter/review the email address for the patient and review the Patient Summary copy.

**Email Patient Summary**

Please confirm patient's email address before sending:

Patient's Email Address

**Patient Summary:**

You have been enrolled in the Long Term Conditions Programme, Toitū Takata, for the next 12 months. This will provide some funding for additional visits with your Doctor and Nurse, these visits will be aimed at helping you to understand and manage your long term health condition.

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Here are the things we can discuss over the year which will help you manage your health better:

Personalised Care Plan:

- A Personalised Care Plan lets you discuss what is important to you and what you want to do to stay well.

Group Education / Shared Medical Appointments

Cancel Send Email

The email address will be automatically populated from the PMS, if available. This can be over-ridden here is necessary. The email cannot be sent without a valid email address entered.

Once the form has been successfully submitted, the outcome of the emailing event will be appended to the top of the summary page. If successful, the 'Email Patient Summary' button will change colour to green and be disabled.

- Patient Inbox

The Assessment's summary will also be saved to the Patient's inbox in the PMS. This page will contain both the Assessment Summary and the Patient summary, allowing the clinician to refer back to either when reviewing the patient.









