Contents

Introduction .................................................................................................................................................. 1

Why was Healthspace developed? .................................................................................................................. 1

General Considerations .................................................................................................................................. 1

What features are offered? .................................................................................................................................. 1

What are the costs involved? ............................................................................................................................. 1

How does it work? .......................................................................................................................................... 1

Is it secure? ....................................................................................................................................................... 1

Do I have any influence on the way Healthspace functions? ........................................................................... 1

What do I do with my old paper filing system? ............................................................................................... 2

What happens if I decide that I no longer want to use Healthspace? ............................................................... 2

How long do I need to keep my old records? ................................................................................................. 2

I am interested in other relevant regulations, where can I find them? ........................................................... 2

Before I start, what do I need? .......................................................................................................................... 3

Do I need any special skills or training? ............................................................................................................ 3

What do I need in terms of internet connectivity? ......................................................................................... 3

Do I need specific hardware or software? ......................................................................................................... 3

Do all my computers need to be networked? ................................................................................................. 3

Getting Started on the Healthspace System .................................................................................................... 4

Registering as a Healthcare Professional and setting up my Practice .......................................................... 4

How do I register? .......................................................................................................................................... 4

How will I know when my registration is successful? .................................................................................... 4

How do I log in? .............................................................................................................................................. 4

Setting up my Practice Portfolio .................................................................................................................. 5

How do I decide what practice number to use for my login? ........................................................................... 5

How do I determine who may use the practice number? ............................................................................... 5

How do I set up a Secretary / Practice Manager login? ................................................................................. 5

Can I use my personal signature or practice logo on my documentation? .................................................... 6

Using the Calendar and ‘To Do’ List .............................................................................................................. 6

Who can use the Calendar and ‘To Do’ list functions? .................................................................................... 6

How do I add an appointment to my Calendar? ............................................................................................. 6

How do I delete or change an appointment on my Calendar? ...................................................................... 6

Can I see an overview of the coming week’s appointments? .................................................................... 6
### Adding Patients to the Database

- Who can register patients on the database? .................................................................................. 7
- Does the patient need to consent to being added to the database? .............................................. 7
- How do I, as a Healthcare Professional or Secretary, register a patient? ...................................... 7
- How do I add a child to the database? ............................................................................................. 8
- What happens if a child turns 18? ....................................................................................................... 8
- How do I change a child’s file to an adult file? .................................................................................. 8
- How do I link a patient to my practice? ............................................................................................ 9

### Working with Patient Files

- How do I open a Patient File? ........................................................................................................... 10
- What can I view on the Main Page of a Patient’s File? ...................................................................... 10
- How do I update a patient’s personal information, e.g. contact details, medical aid details? ........ 10
- What other file functions are available? .......................................................................................... 10

### Adding and Viewing Notes

- How do I start a new note? ................................................................................................................ 11
- What kinds of notes can I make? ....................................................................................................... 11
- How do I add a Patient Note? ........................................................................................................... 11
- How do I add a Clinical Note? .......................................................................................................... 11
- The Standard Consultation Note template ....................................................................................... 11
- How do I add ICD-10 diagnosis codes to a Consultation Note? ....................................................... 12
- How do I view previous notes? ......................................................................................................... 12

### Adding and Viewing Prescriptions

- How do I start a new prescription? .................................................................................................... 12
- What steps do I follow to build a prescription? ................................................................................ 12
- Can I save a list of medications I use often? ...................................................................................... 13
- How do I see my previous prescriptions and repeat previous prescriptions? ............................... 13

### Viewing and Updating the patient’s Medical History

- What elements of the Medical History are visible on the Patient File main page? ......................... 13
- How do I view the detailed Medical History? .................................................................................. 13
- Can I update the Medical History? .................................................................................................. 14

### Referring to a new HP on Healthspace or requesting HP file access

- How do I refer on Healthspace? ........................................................................................................ 14
- Does the patient need to provide consent? ....................................................................................... 14
- Can I request access to a file? .......................................................................................................... 14
- Can I refer to a Healthcare Professional not registered on Healthspace? ........................................ 14

### Uploading and viewing Lab Results and Reports

- .......................................................................................................................................................... 15
How do I upload documents to the patient’s file? ................................................................. 15
What type of documents can I upload and what is the file size limit? ........................................ 15
How do I view previously uploaded documents? ............................................................................ 15
Adding and viewing Sick Notes and other Letters ..................................................................... 16
How do I write a Sick Note or Letter? .......................................................................................... 16
How do I view previous Sick Notes and Letters? ........................................................................... 16
Working with Billing Notes ........................................................................................................... 16
How do I add a billing note? ......................................................................................................... 16
How do I view previous Billing Notes? .......................................................................................... 16
Can I delete notes and other parts of a patient file? .................................................................... 16
What parts of the file can the patient see? ..................................................................................... 17
Can I have more than one patient file open at one time? ............................................................. 17
Other Features .............................................................................................................................. 18
Document Repository ................................................................................................................... 18
What is the Document Repository? .............................................................................................. 18
How do I access the Document Repository? .................................................................................. 18
Can I add documents to the Repository? ........................................................................................ 18
What features are available to a Practice Manager / Secretary? .................................................. 18
Can a Secretary update my Calendar and ‘To Do’ list? ................................................................. 18
Are my practice details available for editing by a Secretary? ....................................................... 18
Adding new patients: can a Secretary do this? .............................................................................. 18
Can a Secretary view Patient Files? ............................................................................................. 18
What parts of a Patient’s File are viewable to a Secretary? .......................................................... 18
Are the contents of the Document Repository accessible to a Secretary? .................................... 19
Rating System for Patient Feedback ............................................................................................. 19
What is the value of the rating system? ......................................................................................... 19
What types of characteristics are scored? ...................................................................................... 19
How do I see my rating? ................................................................................................................. 19
Can patients see the results of the rating system? ........................................................................ 19
Troubleshooting and Assistance .................................................................................................. 19
Synchronisation Issues .................................................................................................................. 19
Patient Registration ....................................................................................................................... 20
Duplicate Files ............................................................................................................................... 20
Notes entered in the wrong Patient File ....................................................................................... 20
Paper Files ..................................................................................................................................... 20
Contacting Us: ............................................................................................................................... 20
Introduction

Why was Healthspace developed?
A need was seen for the improvement of communication between healthcare professionals and with their patients. This idea was developed further by a team of medical doctors with broad experience in the varied South African public and private health sectors, enabled by the expertise of REDi Internet. It grew into its current form based on feedback from early adopters and continues to develop and improve as needs dictate.

Healthspace aims to seamlessly link practitioners to each other and to their patients, providing a practical system to keep patient notes organised and safe, legible and easily accessible, whilst assisting with appointment scheduling and other routine tasks.

It is hoped that Healthspace will be a valuable contributor to improving healthcare quality and efficiency by being accessible, reliable and easy-to-use.

General Considerations

What features are offered?
The principle behind Healthspace is the sharing of accurate information. Both healthcare professionals and patients are able to interact on the system. Healthcare professionals are also able to share patient files with the consent of the patient. The system is designed to allow a paperless record-keeping and record-sharing system.

The main features include: Consultation notes, Prescriptions, Sick notes and Letters, Storage of laboratory or other reports, Referral system and Calendar / To do list. There is also an online appointment system whereby patients can make bookings. Integration with some laboratories has taken place, which allows automatic importing of results into patient files.

Personalised billing notes can be created after a consultation for emailing to an accounts administrator, and development is currently underway to add a formal coding, invoicing and accounts reconciliation system, which will ultimately include switching options.

What are the costs involved?
Please contact us at info@healthspace.co.za for our latest pricing. If you would like to advertise on Healthspace please contact us for our competitive rates.

How does it work?
Healthspace is a web-based service. You will need to register online and log in each time you use it. Data is stored on our dedicated server, which you access via the internet.

Is it secure?
All data is stored on a server behind a secure firewall. Data exchange uses 256 bit encryption, using a secure Extended Validation SSL certificate. Data is backed up on the server daily.
Do I have any influence on the way Healthspace functions?
We are always interested in your comments and suggestions. From time to time, surveys may be posted and we encourage your involvement in order to improve the service. Two Masters Dissertations, utilising doctors’ and patients’ perceptions respectively, have already been used to shape the service as you currently see it. We will evaluate any suggestions and, if feasible, adjust the system to accommodate these.

What do I do with my old paper filing system?
You can decide on the best option for your practice. You can either continue to refer to previous paper notes whilst adding new notes on Healthspace, or you can request a document storage company to digitise your paper records to a network hard drive, which you can access via your computer or the internet.

What happens if I decide that I no longer want to use Healthspace?
You can contact us to request digital copies of your patient files. Files will be retained on the system for the benefit of the patients.

How long do I need to keep my old records?
In most cases, you are required to keep records for six years after they become dormant, or until a child turns 21. Certain other conditions apply. For a summary, take a look at:
http://www.medicalprotection.org/southafrica/factsheets/retention-of-medical-records

A complete guide is available at:
http://www.medicalprotection.org/southafrica/booklets/medical-records

or download this pdf file from the HPSCA:

I am interested in other relevant regulations, where can I find them?
National Health Act

Electronic communications Acts
Before I start, what do I need?

Do I need any special skills or training?
As long as you are familiar with using internet services such as online banking or online shopping, you will need no special training. You will, however, need some time to become familiar with the specific Healthspace environment and you may benefit from a demonstration in your workplace - or via Skype, depending on your location - that will last approximately two hours.

What do I need in terms of internet connectivity?
Healthspace needs a stable internet connection. The recommended minimum setup is a 2Mbps ADSL connection with a 3G/LTE backup modem. A wired connection from the router is preferred for speed and stability, although a Wi-Fi connection will also be suitable.

Consider what you would do in the event of failure of your primary internet source and try to prepare for this in advance. Power failure is another consideration to take into account.

Do I need specific hardware or software?
Healthspace will work on any desktop, laptop, tablet or smartphone, as long as your chosen device has an internet connection. However, for regular daily use a desktop (or fast laptop) computer is recommended as this will be far more responsive and easier to use than a tablet/phone.

An Uninterruptible Power Supply (UPS) is recommended for desktop computers to prevent unsaved information from being lost during an unexpected power outage.

A printer is necessary if you want to print out prescriptions and sick notes.

You do not need to install or download any Healthspace software to get started. Simply use your favourite internet browser. Try to keep your software fully updated for security reasons, and install a reputable Virus Scanner to protect against malware.

Different browsers behave slightly differently and you may want to try the performance on each one. For example, Chrome may perform better than Safari on certain systems.

Do all my computers need to be networked?
No, as long as each workstation/device in your practice has an internet connection, they do not need to be on a local network.
Getting Started on the Healthspace System

Registering as a Healthcare Professional and setting up my Practice

How do I register?
From the Home Page, click on “Register” and then on “Register as a Healthcare Professional”, or go directly to https://www.healthspace.co.za/register_doc.html.

You will be asked to complete a registration form as completely as possible. Fields marked with an asterisk (*) are compulsory, but the more information you provide, the better.

Your Username can only be changed by our administrators, but you are able to change your password at any time.

You will need to provide a practice number for login and practice sharing purposes. This will be the BHF private practice number for the practice where you will be working. If you have a solus practice, give your personal practice number. If you have a group practice, give both your personal practice number and your group practice number(s). The reason for this will be explained below under “How do I decide what practice number to use for my login?”. If you do not have a private practice number, use your HPCSA number without the letters.

Once registered, you will not be able to change your profession, but you will be able to change your area of interest or speciality.

Your personal email address and telephone number will be used to communicate sensitive information with you regarding passwords, etc. Your ID number is needed for verification with the HPCSA or your relevant professional council.

How will I know when my registration is successful?
You will be contacted by email once your status with the HPCSA or your relevant professional council has been confirmed. Once you have received the email you will be able to log in and use the services. Verification occurs within two working days, though it is most often within a few hours.

How do I log in?
From the Home Page, go to Healthcare Professional Login, or directly to https://www.healthspace.co.za/healthpros.html. In the Healthcare Professional Login box, enter your Practice number, Username and Password exactly as those given during your registration. Note that these are case sensitive.

If you have forgotten your login details, click on “Forgot Password” and enter your email address and birth date to receive a reminder email.

Once logged in, you will be taken to your Profile Page. This is your base of operations for all Healthspace functions.

It will save you time if you bookmark the Healthcare Professionals login page instead of the Home page. Have your browser open this page when it starts if this function is available.
Setting up my Practice Portfolio
You must be logged in to your profile in order to make changes.

It will save you time if you bookmark the Healthcare Professionals login page instead of the Home page. Have your browser open this page when it starts if this function is available.

How do I decide what practice number to use for my login?
Please note that it is important what practice number you use to log in. If you are in a group practice and want to share all the patients in that practice, all Healthcare Professionals in that practice should log in using the same group practice number. If you prefer that not all patients be shared, members of your practice should log in using their individual practice numbers and instead share individual patients using the referral function from within the patient’s file.

How do I determine who may use the practice number?
On your profile page, next to your name at the top, you will see “View Practice Members”. Click on this link and you will see your name and an option to “Authorise” yourself for this practice. As the first person to be authorised for this practice number you automatically become the Main Healthcare Professional for that Practice.

If you go back to your profile and refresh the screen you will see a tick next to the relevant practice number, meaning that you are in charge of who is authorised to use that number.

Once other Healthcare Professionals have registered and added the same practice number to their profile, you will be able to see them in the “View Practice Members” area and authorise them to use the practice number. It is very important to complete this step before they consult any patients in your practice, or you may experience errors.

How do I set up a Secretary / Practice Manager login?
The practice main doctor must first be assigned, as per “How do I determine who may use the practice number?” above.

When logged in as a Healthcare Professional, on your Profile Page, click on “Update my Practice Details”. At the bottom of the page is a space to add a secretary password. After adding the password, tick the Terms and Conditions box and then Update. You will be taken back to your Profile Page.

Your Practice Manager or Secretary can now log in on the Healthcare Professional Login page, using the Admin/Secretary box. Use the same Practice Number and Username that would be used in the Healthcare Professional, and the Secretary password.

When logged in as Practice Manager or Secretary, certain features are limited to preserve patient confidentiality. See “What parts of a Patient’s File are viewable to a Secretary?” below for details.

More than one Practice Manager / Secretary can be logged in at one time, but they may need to refresh their pages occasionally in order to maintain synchronicity.
Can I use my personal signature or practice logo on my documentation?

Yes, you can use a **logo of your choice** and **automatically add your signature** to your prescriptions, sick notes and letters. You will be given the option to add your signature, or not, every time you create one of these documents.

On the right of your profile page you will see the current logo and signature assigned to your profile. Click on “update” below the logo or signature. Click “Choose a File”, and browse for a file on your device, one each for your logo and signature. Once the correct files are selected, click on “Upload Logo and Signature”.

Each file size must be less than 500Kb.

Using the Calendar and ‘To Do’ List

Who can use the Calendar and ‘To Do’ list functions?

The **Healthcare Professional and Secretary** can use these functions simultaneously. The calendar needs to be refreshed regularly using the “**Refresh**” button, to ensure that the latest information is displayed to both the HP and Secretary.

A secretary will need to choose the Calendar specific to the **relevant HP** if there is more than one HP in that practice.

How do I add an appointment to my Calendar?

The calendar is accessible from your Profile Page. Click on “**My Daily/Weekly Calendar**”.

To add an appointment, first click on the date of the appointment on the monthly calendar on the left. After that, click on “**Change Date**”. You will then see the date displayed below your name at the top.

Click on the appropriate time that the appointment should begin. A new window appears, giving you the option to change the start time and length (in 15 minute segments) of the appointment. You should also add the details of the patient for easy reference.

Click on **Update appointment**. This will take you back to your calendar, showing the current date. To view the new appointment, go to the relevant date.

How do I delete or change an appointment on my Calendar?

Go to the appropriate date, and click on the appointment you want to change or delete. A window will appear, showing the details of the appointment.

If you want to make changes, adjust the details and click on “**Update Appt**”.

If you want to delete the appointment, click on “**Delete Appt**”.

Can I see an overview of the coming week’s appointments?

Yes, click on “**Weekly Calendar**” to see all your appointments for the next week. To see details of each appointment, click on the “i” symbol in the appropriate time slot.
To go back to the daily calendar, click on “Daily Calendar” or select a specific date to view on the calendar on the left.

Can I go directly to the patient file from my Calendar?
Yes, via a patient search. When you have found the appropriate appointment on your calendar, click the “[S]” on the right of the box. This will perform a **patient search** for relevant patients. Click on the correct patient’s name to access the file.

How do I add a task to my ‘To Do’ list?
Go to the calendar, and write a new task in the “Add a New Task” box. Click on “Add Task” and the task will appear on the left under the monthly calendar.

How do I delete a task?
On the left of each task you will see a small “x”. Click next to the task you want to delete in order to remove it from the list.

Adding Patients to the Database

Who can register patients on the database?
Patients can be registered on the database by a **Healthcare Professional or Secretary/Practice Manager** already registered on Healthspace.

Patients can also **register themselves** on Healthspace.

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If patients register themselves, you have the advantage of not needing them to complete consent forms. However, patients must have an active email account and be very careful to enter their details correctly. They must also link themselves to your practice before coming to the consultation.

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Does the patient need to consent to being added to the database?
Yes, a patient **must first sign consent** before being added to the database. A consent form is available in the **Document Repository**, named “Patient Consent Form”.

A more comprehensive form, “Patient Consent Form with Invoicing” is also available for download and may be suitable to replace your usual patient information form as it incorporates an area for billing details.

If you wish, we can assist you in **creating a form** suitable for your practice, incorporating your practice details and logo.

A patient will also receive an **SMS after registration**, and as this also constitutes a form of consent, it is necessary for the patient to reply to the SMS as per the message instructions.

How do I, as a Healthcare Professional or Secretary, register a patient?
Log in as a HP or Secretary using the appropriate practice number (See: “How do I decide what practice number to use for my login?”).

On your Profile Page, click “Add New Patient to Database”. A patient registration page will be shown.
Choose whether you are entering an Adult patient or a Child under the age of 18 (see “How do I add a Child to the Database?” below).

Enter a Username that the patient can later use to log in to his profile. If the patient does not have a preferred Username, enter generic values such as johnsmith1. Use the random password generator by clicking on “Generate Password” and then “Use Password”.

Usernames can only be changed by contacting our administrators. Encourage patients to log in later and enter their own preferred memorable password.

The system requires an email address in order to pass the registration. If the patient does not have an email address, you may enter a generic address such as johnsmith@healthspace.co.za as long as you are sure that it will not be sent to an existing email address.

Once the patient has signed a consent form, you can tick the Terms and Conditions acceptance box and then click “Register”. The patient will be sent an email informing them that they have been registered on Healthspace, and will also receive an SMS containing an one-time PIN (OTP). The OTP must be entered onto the web page that next appears on registration. If the first SMS is not received, it can be re-sent or an e-mail can be sent instead. Alternatively, a scanned consent form can be uploaded to the patient’s file.

The patient is now added to the database.

To continue back to your profile, click on “My Profile”.

How do I add a child to the database?
Repeat all the steps described above in “How do I, as a Healthcare Professional or Secretary, register a patient?” The differences are:

- Instead of selecting “Parent/Guardian”, select “Child”
- Use the parent’s Username (you can see this by going to the patient’s file and clicking on “Update Details”)
- It does not matter what you enter as a password.

What happens if a child turns 18?
A child who has turned 18 must first sign a new consent form and choose his own Username and Password.

A function is available for changing the Child’s file to an Adult file, if the child is 18 years or older. This function is not available for younger children. See “How do I change a child’s file to an adult file?”.

Either the Parent or the HP/Secretary can do the change.

How do I change a child’s file to an adult file?
Search for the child and go to the child’s patient file. On the left, click “Update Details”. If the child is older than 18, a link “Upgrade Child to Adult” will be displayed near the top of the page. Click on this link.
A new window will ask for a new **Username, Password and email address** for the Child. Once these have been provided, the submit button will effect the change immediately, and link the new adult file to your practice.

### How do I link a patient to my practice?

If you have registered the patient, then the patient’s profile will be **linked automatically** with your practice.

If the patient registered himself then either:

1. He can **link himself** to a Healthcare Professional by logging in to his profile, searching for the HP and adding him/her.
2. The HP can do a patient search after unticking “show only my patients”. A patient registered but not linked will show in grey. Click on the icon to the right of the patient’s name. A request for consent will then be sent to the patient by both **SMS and email**. The patient **must reply** appropriately to either the SMS or the email as consent for you to view his file. Until consent is given, the patient name will be labelled as “Pending” on the search results page. If you wish to re-send the request, follow this procedure again. If you prefer to **upload a written consent form**, click on the icon to the left of the patient’s name and upload the form. You will then be able to access the patient’s profile.
Working with Patient Files

How do I open a Patient File?

On your Profile Page enter the surname or other details of the patient in the “Search for a Patient” box. You will normally search for patients already linked to your profile, so leave the “Show only my patients” ticked unless you want to search all the patients in the Healthspace database.

After clicking on “Submit” you will see a list of patients if the parameters you gave returned a successful search. If not, click “Go Back to Search” to try again.

If a patient is linked to your profile, the patient’s name will be blue and underlined. You can click on the patient’s name to go to the file.

If a patient’s name is grey, the patient is not linked to your profile and will have to be linked before you can view the patient file. See “How do I link a patient to my practice?” above.

Tip: Remember that when navigating around a patient file, always use the button to get back to the patient file overview page. If you use the button, you will leave the patient’s file and return to your own profile page.

What can I view on the Main Page of a Patient’s File?

On the left, you will see a list of the patient’s personal details, including age, contact details, any linked children and medical aid details.

At the top is a series of buttons which allow you to perform various functions such as writing prescriptions. Hover the mouse over a button to see its function.

On the body of the page you also see an area where it is possible to type a Patient Note. There is also a summary of the medical history, regular medications and any allergies, as listed in the patient’s medical history; you will also see summaries of any consultations or notes made, under latest notes; details of previous prescriptions are listed; finally, you will see a list of documents such as laboratory results that have been uploaded onto the patient’s file.

How do I update a patient’s personal information, e.g. contact details, medical aid details?

While on the patient file page, click on the “Update Details” button on the left. After changing the necessary information, tick the Terms and Conditions box and click “Update”.

What other file functions are available?

These buttons are placed at the top of the patient file. Each one can be used to manage aspects of a patient’s file.
These functions are (from left to right):

1. Adding and viewing notes
2. Adding and viewing prescriptions
3. Viewing and updating the patient’s medical history
4. Referring the patient to another healthcare professional on Healthspace
5. Uploading and viewing lab results and reports
6. Adding and viewing sick notes and other letters
7. Performing billing functions

**Adding and Viewing Notes**

**How do I start a new note?**
Go to a patient’s file and click on the button (View and Add Notes). From here, you can write different types of notes. It is also possible to add a patient note directly from the Patient File page.

**What kinds of notes can I make?**
You can add “Patient Notes” and “Clinical Notes”.

*Patient notes* are short comments about a patient that you would like to record in the file, and may optionally be *viewable to the patient*. The default colour for Patient notes in the patient file is *green*, although you can also select to save the note in red, blue and pink.

*Clinical Notes* record relevant details from a *consultation*. They are comprehensive and templates are provided to speed up the recording process. The diagnosis will show up in *orange* on the patient file.

**How do I add a Patient Note?**
On the Patient File page or the Patient & Clinical Notes page, type your note into the text box. It can be up to 500 characters in length. If you do not want the patient to see your note, then tick the “Private Note” box. To save your note in a different colour, select the preferred colour to the right of the text box before saving.

When done, click “Save & Lock Note”. Your note will be saved into the patient’s file and locked.

**How do I add a Clinical Note?**
On the Patient File page or the Patient & Clinical Notes page, click “Add a New Standard Consultation Note”. (The default note is most suited to general or emergency practice, but alternative templates are planned for the future, under “Different Clinical Notes”).

**The Standard Consultation Note template**
Enter text into the text boxes or simply tick the relevant boxes to record pertinent information.

An anatomical image is available for references to several body parts. Click on different parts of the body to add text to the box below the image.
ICD-10 codes can be automatically added to the diagnosis box, see: “How do I add ICD-10 diagnosis codes to my Consultation Note?”. A provisional diagnosis of some type is compulsory for saving a clinical note.

When you have finished entering all relevant information, click on “Save Clinical Note” at the bottom of the template. The note will be saved and locked. If you want to go directly to add billing information after saving, click on “Save Clinical Note & Bill”

**How do I add ICD-10 diagnosis codes to a Consultation Note?**

On the Consultation Note template, under the diagnosis box, is a button “Search ICD-10 Codes”. It opens a new window where you can do a search by entering either a key word or a code.

To add a code and its short description to your diagnosis box, select the correct code from your search results and click “Add Codes to Main Form”. Repeat this as many times as necessary. When you are finished, click “I’m Done”

Note that the ICD-10 Codes are updated to the 2013 version.

**How do I view previous notes?**

A list of patient notes and clinical note diagnoses is viewable on the Patient File main page. To view details of previous clinical notes, click on the “View & Add Notes” button at the top of the patient file. Clinical notes that can be viewed will have the date and time underlined. Click on this underlined text to view the note.

**Adding and Viewing Prescriptions**

**How do I start a new prescription?**

Go to a patient’s file and click on the button (view scripts). Click on “Add a New Script”. You will be taken to a page where you can build a new prescription.

**What steps do I follow to build a prescription?**

On the Prepare a Script page, first take note of any allergy warnings.

In the Build Your Script area, type or select the relevant information as below for the first medication (in order from left to right, top to bottom):

- name and strength of the medication (type)
- means of administration (select)
- amount per dose (type)
- form of measurement of dose (select)
- optional note (type)
- frequency of dosage (select)
- route of administration (select)
- whether it should be taken per schedule or as needed (tick box)
- length of the course (type and select)
- number of repeats of the course for that medication (type)
- optional notes (e.g. no generic substitution) (type or select)
When done with the first medication, click “Add Line to Script”. The first line of medication you have added will appear on the left. To delete that medication, click the small x at the end of the line of that medication.

**Repeat the above process** for every additional medication you wish to add to the prescription.

Before saving the script, check that the correct patient name is listed on the left, and optionally include the latest **ICD-10 codes** on the prescription by ticking the box next to “Latest Diagnosis”. The diagnosis information can be changed here if necessary.

Tick “**Include Signature on Script**” if you would like to have your saved signature added to the prescription automatically (useful for faxes or remote printing). See “Can I use my personal signature or practice logo on my documentation?”.

Click on **Save Script**. The prescription will be saved and a new window will open, giving you the option of printing out the new prescription (Click “Print”). After printing, click “Close” to close the prescription window. You can now choose to “**Start a New Script**”, or return to the patient file or your profile page.

**Can I save a list of medications I use often?**

Yes, just remember to tick the “**Add To Favourites**” box in the Build Your Script area. Your medication details will be saved when you click “Add Line to Script”.

To automatically add previously saved favourites, select the medication from the Select Favourite menu and click “Add Line to Script”.

To remove a medication from your favourites list, select it and click the X to the right of the menu.

**How do I see my previous prescriptions and repeat previous prescriptions?**

Go to the patient’s file and click on the “**View Scripts**” button or the “**Show All Scripts**” button. A list of prescriptions is listed, ordered by time and date. To view a printable script, click on the relevant blue, underlined date/time code.

To open a previous script for modification, click on the “**Repeat Script**” button. Add new lines or delete existing lines as needed, before saving the modified script under the current date.

**Viewing and Updating the patient’s Medical History**

**What elements of the Medical History are visible on the Patient File main page?**

*Chronic Conditions*, *Regular Medication* and *Allergies / Adverse Reactions* are shown on the main page of a patient file. If the Medical History is changed, then these will be updated.

**How do I view the detailed Medical History?**

Go to a patient’s file and click on the **Medical History** button.
Can I update the Medical History?
Yes, go to a patient’s file and click on the button (View Medical History). Any elements of the history can be updated. When you are finished, click the “Save My Medical History” button to save the changes. Previous saved versions will be backed up and time-stamped and are available for viewing under the Medical History Archive on the upper right of the Medical History page.

Referring to a new HP on Healthspace or requesting HP file access

How do I refer on Healthspace?
Go to a patient’s file and click on the button (Refer Patient). If the healthcare professional is already registered on Healthspace, then you can do a search for him/her. Click on the HP’s name.

Your name, the name of the HP to whom you are referring, and the patient’s name will be imported into a referral letter template. You can adjust the text and when you are done, click on “Save & Refer”. An email containing the referral letter text will be sent to the HP. A copy will also be made on the patient file, displayed in green. Close the information window.

Does the patient need to provide consent?
Before access to the patient file is granted to the new HP, the patient must provide consent. This can take place in any of the following ways, and provides full file access:

- The patient can reply to the SMS automatically sent to his cell number
- He can respond to the automated email request for permission
- He can log into his patient profile and authorise the referral/request
- A consent form can be uploaded to the patient’s file by the new HP, by clicking on the icon to the left of the patient’s name

Until file access is granted, the patient’s name will be labelled as “Pending”. A repeat request for consent can be sent to the patient in a pending state by clicking on the icon to the right of the patient’s name.

Can I request access to a file?
Yes, search for the patient with the “Show only my patients” box unticked. If the patient is not yet linked to your practice, the name will be in grey.

Click on the icon to the right of the patient’s name. A request for consent will be sent to the patient in the same way as listed under “Does the patient need to provide consent?”

Can I refer to a Healthcare Professional not registered on Healthspace?
You need to request that the HP first registers on Healthspace. It is a simple process, but remember that because of the necessary verification steps, there may be a delay before the HP is visible on the system.
Uploading and viewing Lab Results and Reports

How do I upload documents to the patient’s file?

Go to a patient’s file and click on the 📂 button (Upload Documents) or the “Show documents” button. A new window appears.

Documents which are uploaded can be handled by the system in the following ways:

- **Patient View** Documents – these can be seen by the HP and the patient.
- **HP View** Documents – these are viewable by the HP only and cannot be seen by patients.
- **POPI** Documents – this is where you need to store consent documents (POPI stands for the Protection of Personal Information Act)

Click the link that applies to the type of upload you would like to make. A new window appears with instructions for uploading files. Once the file(s) is successfully uploaded you can close the upload documents window.

Once uploaded, you can perform the following actions on files:

- **Add a comment** to a file by clicking the “Add File Comment” icon. Comments are designed to give a quick overview of the file content so that you do not need to download and open the file each time.
- **View** the file by clicking on the underlined file name
- **Move** a file from Healthcare Professional view to Patient View by clicking PV
- **Move** a file from Patient view to Healthcare Professional View by clicking DV
- **Delete** a file by clicking the “Delete File” icon

What type of documents can I upload and what is the file size limit?

You can upload most file formats (pdf, docx, jpg, etc.).

It is important to note the following tips:

- Try to keep your file names concise, with a short description of the contents. Long file names may cause issues with uploading and viewing.
- Avoid using spaces – rather use underscores “_” when necessary, which will reduce errors. Example: EVANS_TM-FBC_ESR_U&E.pdf
- Avoid uploading large files. The system can handle files up to 5MB in size, but smaller files are likely to upload and download more smoothly. It is suggested that you set your scanner on 150dpi quality, or camera on 1MP, which results in good quality images but keeps file sizes to about 300KB per page. This saves bandwidth, storage space time when uploading and downloading for viewing.

How do I view previously uploaded documents?

Go to a patient’s file. A list of documents is shown under the heading Documents. Click on the relevant file name to open the document in a new browser window.
Adding and viewing Sick Notes and other Letters

How do I write a Sick Note or Letter?

Go to a patient’s file and click on the button (Add Letter / Sick Note). Click on “Add a New Sick Note / Letter”.

Complete the relevant boxes for a Sick Note or Letter and choose whether you want to add your signature automatically. Click “Add Sick Note” or “Add Letter”. The letter will be saved and opened in a new window for you to print. When finished, close the window.

Tip: Letters are useful for saving text such as email correspondence. Cut and paste into the Letter box to save relevant text.

How do I view previous Sick Notes and Letters?

Go to a patient’s file and click on the button (Add Letter / Sick Note). A list of letters by date and time are shown. Click on the relevant date and the letter will open in a new window. You can print the letter or close the window.

Working with Billing Notes

How do I add a billing note?

To create a note directly, go to the patient’s file and click on the button (View Billing Notes). Click on “Add a New Billing Note”. Alternatively, after writing a standard consultation note, click “Save Clinical Note & Bill”.

Add the relevant item code and description in the boxes provided, and tick the “Add to Favourites” box to save the item for future use. To select previously saved favourites, select items from the dropdown menus. Click on “Add Line to Billing Note” to save each new line, and once completed, Save the Billing note.

The Note can optionally be emailed to the admin email address saved in your Practice Details, by checking the “Email Billing Note to Admin” box.

How do I view previous Billing Notes?

Go to a patient’s file and click on the button. A list of notes is shown. Notes cannot be opened, but a note can be deleted by clicking the red [x]. Secretaries are able to view Billing Notes.

Can I delete notes and other parts of a patient file?

For medico-legal reasons, all notes, prescriptions, referral letters and sick notes / letters are locked once saved. They cannot be altered or deleted. If you mistakenly enter notes on the incorrect patient file, please contact us on info@healthspace.co.za. You will be asked to complete a request form detailing which note must be removed and the reason therefor.

The medical history can be changed at any time. Previous versions of the history will be archived after each change.
Uploaded documents can be deleted by clicking on the [trash can] on the left of the document file name.

Billing Notes can be deleted by clicking the [x] to the left of the relevant note.

What parts of the file can the patient see?

Notes:

Patient note: By default, the patient can view this type of note. If, however, you want to keep a short note private from the patient, tick the “Private Note” box above the box where you enter then note, and the patient will not be able to view it.

Clinical note: only the diagnosis is visible to the patient.

Prescriptions:

Patients can see the drug names and dosages of their prescriptions, but not the signed script. This is so that they can be reminded of the medication details but not abuse signed prescriptions.

Medical History:

A patient can see a list of chronic conditions, regular medication and allergies on the main Patient File page. In addition, patients have full access to their own detailed medical history page and are encouraged to keep this information up-to-date.

Referral Notes:

Patients can see the details of referral notes in their patient file.

Lab Results and Reports:

Patients may have the option of viewing the details of uploaded documents, depending on whether files were uploaded as “Patient view” or “HP view” For “HP View” documents, they will be able to see the file name but not the contents of the file. See “How do I upload documents to the patient’s file?”.

Sick Notes and Letters:

Patients cannot see any information from sick notes or letters.

Billing Notes:

Patients cannot see any information from billing notes.

Can I have more than one patient file open at one time?

Yes, you can leave patient files open in different tabs on your browser and come back to them later. To do this, open patient files in a new tab when you click on their name in the search results (in Windows, right click, then click “Open link in new tab”). Leave the file open and click on the “Patient Search Results” tab to continue with new patients.

Please note that there is an auto-save function for patient notes and letters. Unattended notes will be saved after a period of time to protect against loss. You will not be able to amend these notes once saved, but a new note could be added to include missing info.
Other Features

Document Repository

What is the Document Repository?
The repository is a collection of documents available for download. You may find these documents valuable for general interest or for use in your practice.

How do I access the Document Repository?
From your Profile Page, click on “Document Repository” on the left. An alphabetical list of documents will be shown. To download any of these documents, simply click on one of them.

Can I add documents to the Repository?
If you have a document that you feel would be useful for all healthcare professionals, please email it to us so we can add it to the repository. File size is limited to 1MB.

What features are available to a Practice Manager / Secretary?

Can a Secretary update my Calendar and ‘To Do’ list?
A secretary can view and update calendars and ‘to do’ lists for each Healthcare Professional linked to the active practice number. The process is exactly the same as that described in “Using the Calendar and ‘To Do’ list”.

Any changes made by a secretary are updated on your calendar or ‘to do’ list. In order to see the changes you may need to press the “Refresh” button on the calendar page.

Are my practice details available for editing by a Secretary?
No, only the Healthcare Professional can change practice details.

Adding new patients: can a Secretary do this?
Yes, a secretary can register patients to the database, in exactly the same way as described in “How do I, as a Healthcare Professional or Secretary, register a patient?”

Can a Secretary view Patient Files?
A secretary can search for patient files and open them. However, the amount of information and functionality available to a Secretary is limited, see “What parts of a patient’s file are viewable to a Secretary?”.

What parts of a Patient’s File are viewable to a Secretary?
The patient’s personal information (contact details, medical aid details, etc.) are viewable, as are any diagnostic codes, referral notes, or short patient notes. Personal information can also be updated.

A secretary cannot view any of the information within the medical history, such as regular medications, allergies, or previous scripts.
Of the functions at the top of the page (creation of consultation notes, prescriptions, referrals, modifying medical history, etc.), only the upload documents function is accessible.

**Are the contents of the Document Repository accessible to a Secretary?**
Yes, any of the documents in the repository can be downloaded.

**Rating System for Patient Feedback**

**What is the value of the rating system?**
This system provides a way of receiving useful **feedback** from patients on various aspects of one’s practice. Feedback can be given once every 3 months by a patient.

The potential added advantage is that patients doing a search for Healthcare Professionals in their area may decide to consult with one with a higher overall score.

**What types of characteristics are scored?**
Scores are given from 1 to 5 (lowest to highest) for each of the following:

- Clinical Competence
- Bedside Manner
- Facilities
- Cost
- Follow-up

**How do I see my rating?**
Go to the profile page. In the lower left corner you will see the average ratings from all your combined patients’ feedback.

**Can patients see the results of the rating system?**
Patients can see an aggregated score out of 5, which is the average of the five individual scores given by all the patients who have participated in the rating system for a particular healthcare professional.

The score is represented by 1 to 5 stars, displayed next to the Healthcare Professional’s name in a patient’s search results. Unrated HPs will not have any stars.

**Troubleshooting and Assistance**

**Synchronisation Issues**
You may occasionally find that information does not synchronise between the HP profile and the secretary profile or certain pages can display unexpected information.

To resolve this issue, click your browser’s **reload/refresh** button or F5.

If this occurs on the calendar, you can also click on the “Refresh” button above the calendar. You may have to do this frequently if your secretary is updating appointments often.
Patient Registration
When a patient registers on Healthspace an OTP email is sent by SMS or email to the patient. The OTP must be provided and entered on the website in order to continue, as part of the consent process.

The Healthspace server sends out SMSes and emails but for various reasons, the SMS or email may not reach the patient. As an alternative option, the written consent form can be uploaded instead.

Duplicate Files
Great care must always be taken when registering patients on the system. There are safeguards in place (automatic comparison of profiles), however it is still possible to register a patient more than once.

If this occurs, please let us know so that we can discuss the best option with you. It is relatively simple to delete one of the profiles provided that no notes have been added to that profile. Once notes have been added to both profiles, the issue is more complex.

Notes entered in the wrong Patient File
It may happen that notes are written in the wrong patient file. If this happens, the notes will need to be re-written in the correct file (with an added note detailing this). The notes in the incorrect file will need to be deleted as soon as possible... please inform us timeously if this occurs.

Paper Files
Rarely, patients will refuse an electronic file (hence the need for consent before registering them). After seeing the system in operation, they will often give consent, but if not, you may need to keep a small number of paper files for such patients.

If patients register themselves, they must tick the Terms and Conditions while registering and therefore do not need to complete a consent form.

Contacting Us:
You are welcome to email us at info@healthspace.co.za or use the online enquiry form. We try to keep the turnaround time for replies as short as possible, usually to within a few hours. From time to time, replies may be delayed by a day or more if the office is particularly busy or closed for special occasions.

For a telephonic discussion, you are welcome to try us during office hours on our sharecall number, 086 11 11 342, which will only work within South Africa. Telephonic assistance cannot always be guaranteed.

In an emergency, if you are having technical difficulties and cannot get hold of us using the above email address or number, you can try contacting our hosting company, REDi Internet, on 0861 RED RED (0861 733 733) or support@redi.co.za.

Please remember to tell your patients not to contact Healthspace for reasons other than technical queries regarding the Healthspace Website. In order to contact your practice they should use your practice contact details.
Errors or Omissions

If you come across any errors or omissions in this help document, please notify us by email on info@healthspace.co.za.