

GoShare Plus Guide



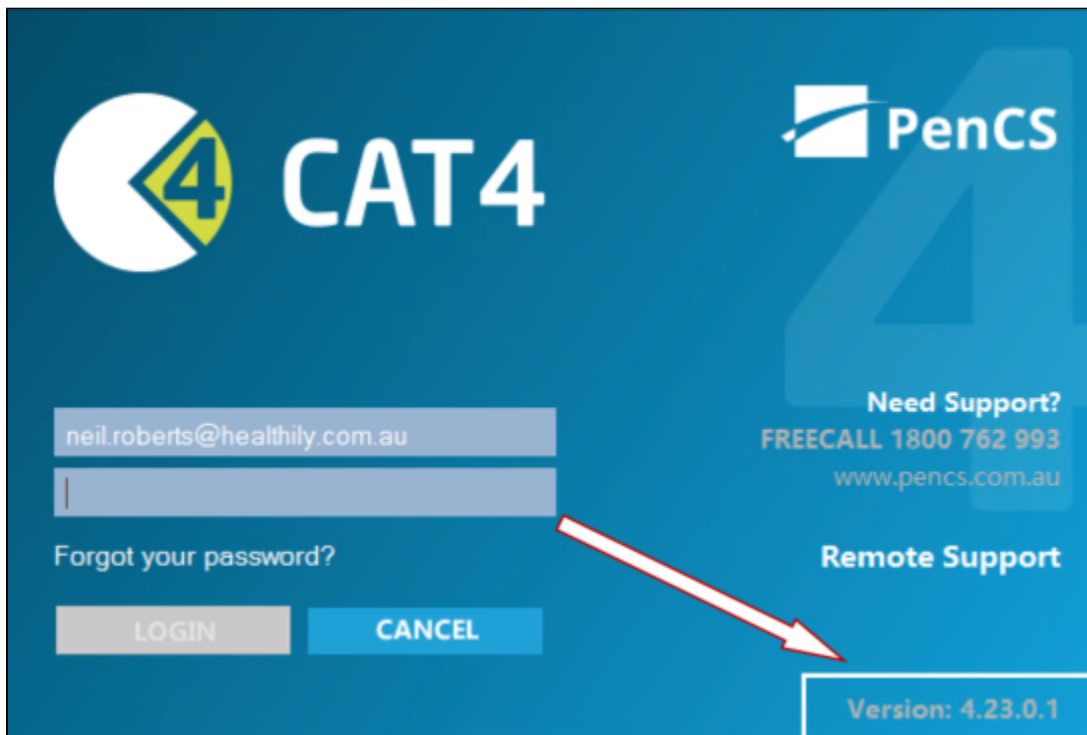
Unknown macro: 'export-link'

To use GoShare Plus you need to be licensed and have credits in your GoShare account. Please contact Healthily on 03 9534 7222 or visit <https://healthily.com.au/goshareplus/>

This guide will show you how to use CAT4 to identify patients you want to target with your campaign and how to send messages to those patients.


Preparing CAT4

- Click the CAT4 icon on your desktop
- On the login screen, check that you have CAT4 version of 4.23.0.1 or later.




If not, you will have to update CAT4 to utilise GoShare Plus. Contact PenCS Support and/or Healthily to organise.

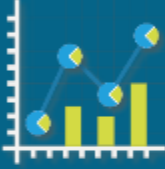
Once logged in click on the CAT4 view.




CAT4
the full range of tools




Daily View
Manage your Registers,
Risks and Care Plans




CDM View
Chronic Disease
Management for Diabetes,
CVD and CKD




Cleansing View
Manage your Data
Cleansing Activities



My CAT Wizard
Manage your own activities
by using the My CAT Wizard
to create custom views




I-qi View
Manage your Indigenous
Quality Improvement
Programs



Registrar View
Manage your Registrar
Activities and Reporting

- Click "View Extracts"




Best Practice, Samples Database

Demographics | Ethnicity | Data Quality | Data Cleansing | Allergies | Smoking | Alcohol | Measures | Pathology | Disease | Screening

Population Pyramid | Age Profile (RACGP)

☐ Select All ☐ Show Total Counts

- Select an extract of total patient population – the most recent extract will be on top of your list of extracts.



The screenshot shows the CAT4 software interface. The top menu bar includes File, Edit, View, Tools, Data Submission, Prompts, Scheduler, and Help. Below the menu bar is a toolbar with icons for Collect, Hide Extracts, Hide Filter, Report, View Population, Dashboard, CAT4, Cleansing CAT, and Registrar CAT. The main window is divided into several sections:

- Left Panel:** A list of data extracts. The most recent extract, "01/08/18 3:03 AM 100M DEIDENTIFIED_DE...", is selected.
- Filters Section:** Includes tabs for General, Ethnicity, Conditions, Medications, Date Range (Results), Date Range (Meta), Patient Name, Patient Status, Providers, Risk Factors, Health Care Homes, MBS Attendance, Custom Filters, and Saved Filters. The General filter is active, showing options for Gender (Male, Female, Other), DVA (DVA, non DVA), Health Cover (Medicare No., No), and Age (Start Age, End Age, No Age). There are also options for Activity (Active, Not Active) and Postcode (Include, Exclude).
- Reports Section:** A bar chart titled "Demographic Breakdown by Age [population = 9713]". The chart shows the number of patients by age group (0-4 to 85+ years) for Females (yellow bars) and Males (green bars). The population is split into 5728 Females, 3809 Males, and 175 Other.

- Click "Hide Extracts" icon



- Click "View Filter" icon



You are now ready to filter for patients eligible for your GoShare Plus activity.

Create your patient list using CAT4

Follow a [CAT 4 recipe](#) or use your own filters to create your patient list.

Click on the area of the pie chart or column in the bar chart with the relevant patients for your activity (eg. the patients that have not been screened or vaccinated).

Click export or double click to create the Reidentify Report.

The Reidentify Patient report will show a list of your patients and will give you access to the GoShare Plus icon.

Patient Reidentification

1 of 1

Reidentify Report [patient count = 5]
 Selected: Last Shingles (Nothing Recorded)

| ID | Surname | First Name | Known As | Sex | D.O.B (Age) | Address | City | Postcode | Phone (H/W) | Phone (M) | Medicare | IHI |
|----|------------|----------------|-----------|-----|-----------------|-----------------|-----------|----------|--------------------------------|------------|-------------|-----|
| 2 | Abbott | Alan | Alan | M | 30/06/1945 (74) | 12 John St | Woodlane | 4035 | H:07 50505050 W:07 50509999 | 0427556232 | 41331804671 | |
| 8 | Allen | Fay | Fay | F | 12/07/1940 (79) | 8 Grey St | Fremantle | 6160 | H:08 99905050 | | 22345678911 | |
| 19 | Marshal | Elizabeth Jean | Elizabeth | F | 02/11/1948 (71) | 15 Albert St | St Peters | 5069 | H:08 99905050 | | 65001105022 | |
| 63 | Moorehouse | Andrew | Andrew | M | 21/11/1949 (70) | 113 My St | Seaforth | 2092 | | 0403458518 | | |
| 55 | Nerk | Fred | Fred | M | 19/11/1948 (71) | 492 St Kilda Rd | Melbourne | 3000 | | | | |

Extract Details:
 Practice Name: Best Practice Clinic
 BPExtract
 Extract Date: 19-12-2019 10:32 AM
 Patient Count: 43
 Printed: 14-01-2020 8:47 AM
 Pen CS CAT4 - Not Published(4.21.0.9004) - Pen CS

Refine Selection
 Add/Withdraw Patient Consent

GoShare Plus
 SMS Recall
 Voicemail Recall
 Topbar Prompt

Setting up the GoShare Plus information bundle

Once the list of eligible patients has been generated, click the GoShare Plus icon.

 If the icon is greyed out or doesn't respond when clicked, contact Healthily on 03 9534 7222 or email support@healthily.com.au

Patient Reidentification

1 of 1


Find | Next

Reidentify Report [patient count = 4]

Filtering By: Age >= 597 and <= 601 mths, Selected: FOBT last recorded (Not Recorded)


| ID | Surname | First Name | Known As | Sex | D.O.B (Age) | Address | City | Postcode | Phone (H/W) | Phone (M) | Medicare | IHI |
|----|----------|------------|----------|-----|-----------------|-----------------|-----------|----------|-------------|--------------|----------|-----|
| 66 | Davidson | Kellie | Kell | F | 17/03/1970 (49) | 492 Stkilda Rd | Melbourne | 3004 | | 0418 356 189 | | |
| 62 | Jones | Stephen | Steve | | 09/01/1970 (50) | 492 Stkilda Rd | Melbourne | 3004 | | 0491570156 | | |
| 61 | Philips | Margaret | Marg | F | 09/03/1970 (49) | 492 Stkilda Rd | Melbourne | 3004 | | 0418536596 | | |
| 56 | Smith | Jonathan | John | M | 31/12/1969 (50) | 492 St Klida Rd | Melbourne | 3004 | | 0412226343 | | |


Extract Details:
Practice Name: Best Practice Clinic
BPExtract
Extract Date: 20/02/2020 9:49 AM
Patient Count: 46
Printed: 24/02/2020 5:45 PM
Pen CS CAT4 - Not Published(4.23.0.1) - Pen CS





Refine Selection

Add/Withdraw Patient Consent


GoShare Plus


SMS Recall


Voicemail Recall


Topbar Prompt

- A "GoShare Plus" panel will appear on the RHS of the screen.

GoShare Plus

1. Activity Name: (free text)

Load Bundle Selection with Bundles created by:
☒ neil.roberts+gspb@healthily.com.au
☐ HLY PHN
☐ Healthily Medical Centre

2. Bundle Selection: [View Details](#)

3. SMS Text:

Characters Remaining: 150 SMS Credits: 0
 SMS length <= 150 chars (1 Credit); 151 - 296 chars (2 Credits); > 296 chars not allowed
Inclusion Criteria:
 Filtering By: Age >= 597 and <= 601 mths
 Selected: FOBT last recorded (Not Recorded)

4. Send Test

☐ Remove patients who have opted out of receiving SMS
☒ Include opt-out message at the end of the SMS message
 Credits Required: 0 Credits Available: 450 [Top-up Link](#)

Patient Reidentification

1 of 1

Find | Next

Reidentify Report [patient count = 3]
 Filtering By: Age >= 597 and <= 601 mths, Selected: FOBT last recorded (Not Recorded)

| ID | Surname | First Name | Known As | Sex | D.O.B (Age) | Address | City | Postcode | Phone (H/W) | Phone (M) | Medicare | PHN |
|----|---------|------------|----------|-----|-----------------|-----------------|-----------|----------|-------------|------------|----------|-----|
| 62 | Jones | Stephen | Steve | | 09/01/1970 (50) | 492 Skilda Rd | Melbourne | 3004 | | 0491570156 | | |
| 61 | Philps | Margaret | Marg | F | 09/03/1970 (49) | 492 Skilda Rd | Melbourne | 3004 | | 0418536596 | | |
| 56 | Smith | Jonathan | John | M | 31/12/1969 (50) | 492 St Kilda Rd | Melbourne | 3004 | | 0412226343 | | |

Extract Details:
 Practice Name: Best Practice Clinic
 @PEExtract
 Extract Date: 20/02/2020 9:49 AM
 Patient Count: 46
 Printed: 24/02/2020 5:45 PM
 Pen CS CAT4 - Not Published(4.23.0.1) - Pen CS

Refine Selection

Add/Withdraw Patient Consent

GoShare Plus

SMS Recall

Voicemail Recall

Topbar Prompt

NOTE: The list of patients will now be reduced to those who have a mobile phone number listed in your Practice software.

- **Step 1: Create an Activity Name.** This is free text and identifies the activity in reports.
- **Step 2: Select the content bundle** using one of the 3 buttons:
 - Your email address (if you created the bundle yourself)
 - Your PHN (if the bundle was shared with all Practices in the region by your PHN)
 - Your Practice Name (if the bundle was shared with selected practices by your PHN or Healthily)
 - Select a bundle from the drop down selection
 - Click "View Details" to check the contents of the selected bundle.
- **NOTE:** for Practices that are only able to access GoShare Plus (via CAT4) and not GoShare, Healthily will share the Bundle to the Practice (so should be found under the 3rd button)
- **Step 3: The SMS text** for that bundle (or from your Branch) will be pre-filled
 - Edit the practice phone number in the SMS if required

GoShare Plus

1. Activity Name: (free text)

Bowel Cancer Screening

Load Bundle Selection with Bundles created by:

☐ neil.roberts+gspb@healthily.com.au

☐ HLY PHN

☒ **Healthily Medical Centre**


2. Bundle Selection:

-- Select Bundle --

-- Select Bundle --

Bowel Cancer Screening GSP
HMR v2 06022020
Shingles Vaccination Demo Bundle

[View Details](#)

 If the Bundle is not visible, contact Healthily on 03 9534 7222 or email support@healthily.com.au

- **Step 4: Send Test Message**

- Check the SMS message and the content bundle patients will receive by sending a test SMS to yourself via the Send Test pop-up – fill in your name and mobile number
- Check the inclusion criteria set up in CAT4
- Once you receive the SMS on your phone, check the test SMS for the following:
 - Patient First Name substitution is correct.
 - Your Practice Name is correct.
 - Practice Phone number is correct.
 - Tap the link in the SMS to ensure the link works and that the correct bundle has been included.

GoShare Plus Send Test Message to

Enter details to send a Test Message to see the SMS and attached bundle format

First Name:

Surname:

Mobile No.:

Australian mobile number "04xxxxxxxx" without spaces

3. SMS Text:

Hi [recipient],
 Msg from
 Around your 50th birthday, you will be sent a free National Bowel Cancer Screening kit in the mail.
 Screening saves lives.
 Select this link for important info : [landing_page]
 Call us on 03 9534 7222 for more information

Characters Remaining: 34 SMS Credits: 2
 SMS length <= 150 chars (1 Credit); 151 - 296 chars (2 Credits); > 296 chars not allowed

Inclusion Criteria:

Filtering By: Age >= 597 and <= 601 mths
 Selected: FOBT last recorded (Not Recorded)
 Excludes opt out patients

4. Send Test

☒ Remove patients who have opted out of receiving SMS
☒ Include opt-out message at the end of the SMS message

Credits Required: 0 Credits Available: 450 [Top-up Link](#)

⚠ If there are any problems with the test SMS, contact Healthily 03 9534 7222 or email support@healthily.com.au

Using GoShare Plus – sending the information bundle to selected patients

- SMS Credits – the number of SMS Credits required, and the number you have available – is displayed at the bottom of the GoShare Plus panel

If you don't have enough credits – see the Appendix below for how to access additional SMS Credits (eg: via the Top-up Link)

- When all is ready – Click "Send" button.

If the "Send" button is greyed out, ensure you have

- selected a bundle, and
- entered an Activity Name.

3. SMS Text:

Hi [recipient],
Msg from
Around your 50th birthday, you will be sent a free National Bowel Cancer Screening kit in the mail.
Screening saves lives.
Select this link for important info : [landing_page]
Call us on 03 8524 7222 for more information

Characters Remaining: 34SMS Credits: 2

SMS length <= 150 chars (1 Credit); 151 - 296 chars (2 Credits); > 296 chars not allowed

Inclusion Criteria:
Filtering By: Age >= 597 and <= 601 mths
Selected: FOBT last recorded (Not Recorded)
Excludes opt out patients

4. Send Test

SendCancel

☒ Remove patients who have opted out of receiving SMS

☒ Include opt-out message at the end of the SMS message

Credits Required: 0Credits Available: 450[Top-up Link](#)

You will see a popup box confirming the details for the activity. Check that the number of patients who will receive the bundle seems correct.

Send GoShare Plus SMS

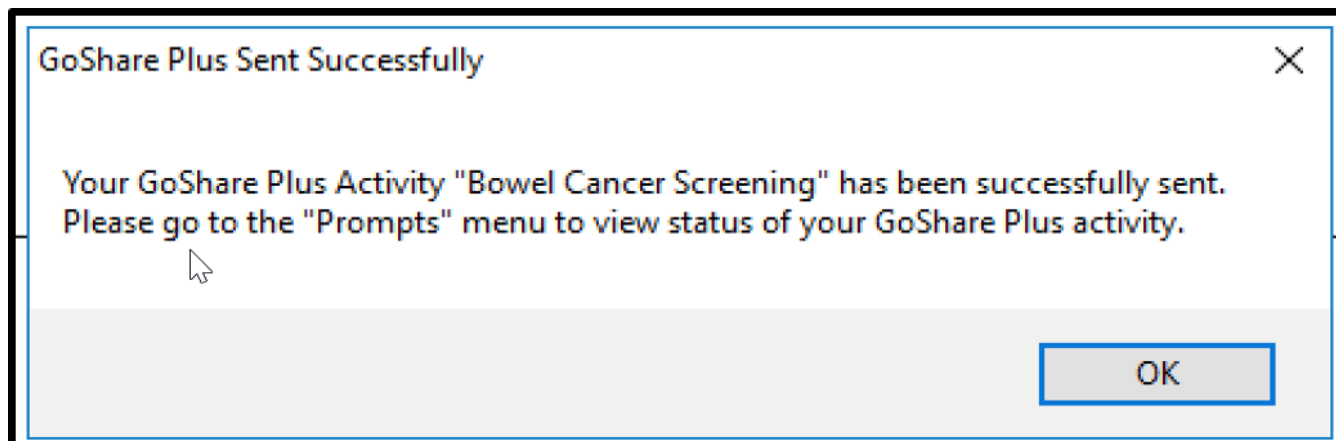
You are about to create Activity "Bowel Cancer Screening " to send bundle "Bowel Cancer Screening GSP" by SMS to 3 patient(s).
SMS Message Length : 262 characters (2 credits per SMS).
This will use 6 credits of 450 credits available.
Note: SMS Length <= 150 chars (1 Credit); 151-296 chars (2 Credits)
> 296 chars not allowed

Do you wish to continue?

Yes

No

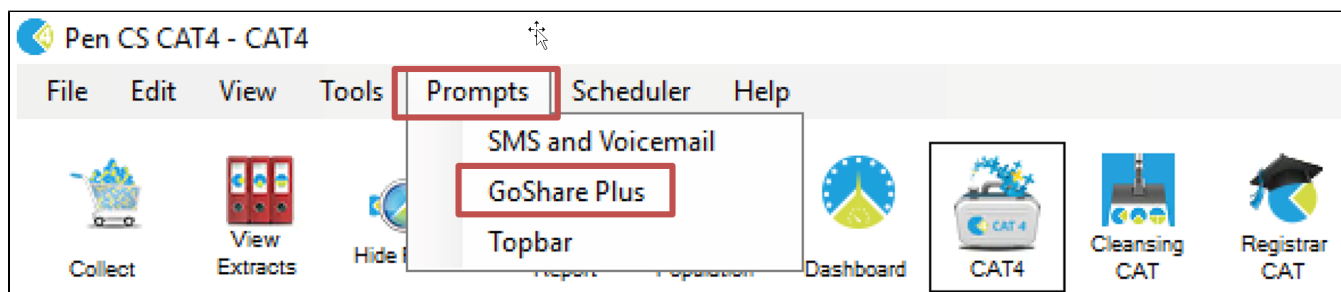
If all is OK, click "Yes"
A notification will pop up when the bundle is being sent.



Click OK to close the window.

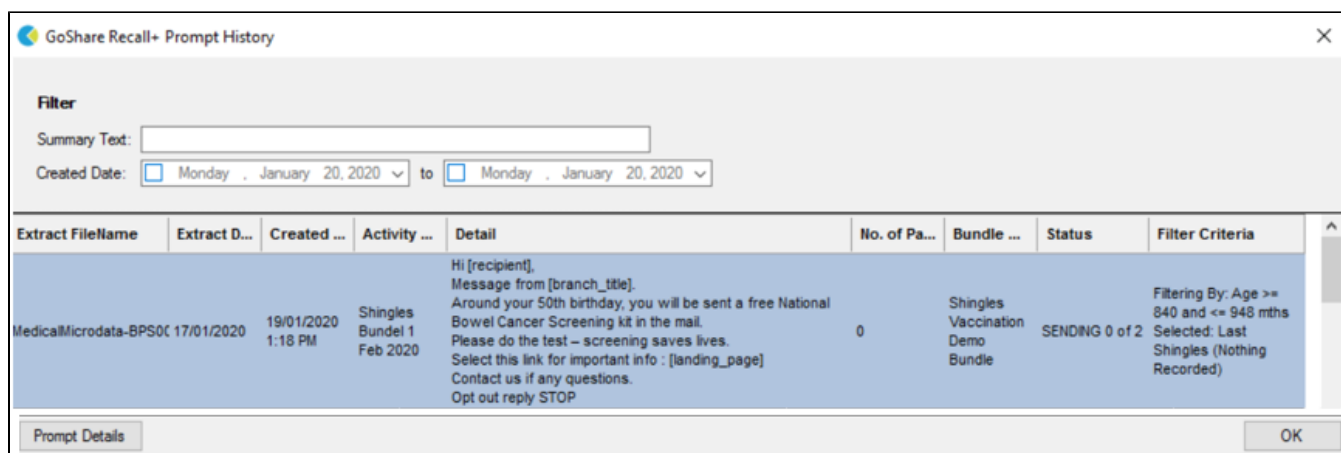
Prompts Menu - Checking status of SMS bundles sent

From the CAT4 top menu, select "Prompts" and then GoShare Plus"



The Prompt History will show all the details of the activity

Click "Prompt Details" to view status of the SMS sent to individual patients.



This report shows delivery status of individual SMS

A date and time appear in the "Actioned" column if the patient has followed the link to view the bundle.

Select an Activity row, and then Click "Prompt Details" to view detailed status of the Activity - the SMS sent to individual patients.

Prompt Details

| Prompt Type | Created Date | Status | Actioned | GP Name | Family Name | Given Name |
|-------------|--------------------|--|----------|---------------------------|-------------|------------|
| GoShare | 24/02/2020 4:51 PM | SMS Status: sent (SMS Undelivered: The Carrier could not deliver the message) | | Dr Frederick Findacure | Jones | Stephen |
| GoShare | 24/02/2020 4:51 PM | SMS Status: delivered | | Dr Frederick Findacure | Philips | Margaret |
| GoShare | 24/02/2020 4:51 PM | SMS Status: delivered | | Dr Frederick Findacure | Smith | Jonathan |

Save

OK

This screen shows the delivery status of each individual SMS.

Note : you may see SMS queued – which can last up to 48 hours while the phone carrier tries to reach the handset (which may be switched off, or out of signal)

A date and time appear in the "Actioned" column if the patient has followed the link to view the bundle.

| Prompt Details | | | | | | |
|----------------|---------------------|----------------------------------|---------------------|---------------------------|---------------------------|---------------------------|
| Prompt Type | Created Date | Status | Actioned | GP Name | Family Name | Given Name |
| GoShare | 27/02/2020 10:37 AM | SMS Status: queued | | Dr Frederick Findacure | Moorehouse | Andrew |
| GoShare | 27/02/2020 10:37 AM | SMS Status: delivered | 27/02/2020 10:45 AM | Dr Frederick Findacure | Campbell Needs Vac | Tina |
| GoShare | 27/02/2020 10:37 AM | ERROR: not enough SMS credits | | | Roberts 79 Yrs 10 Mths | Neil Needs Vaccination |

- You can Sort this screen by clicking on a column heading
- Click "Save" to save this report as a .csv file for analysis.

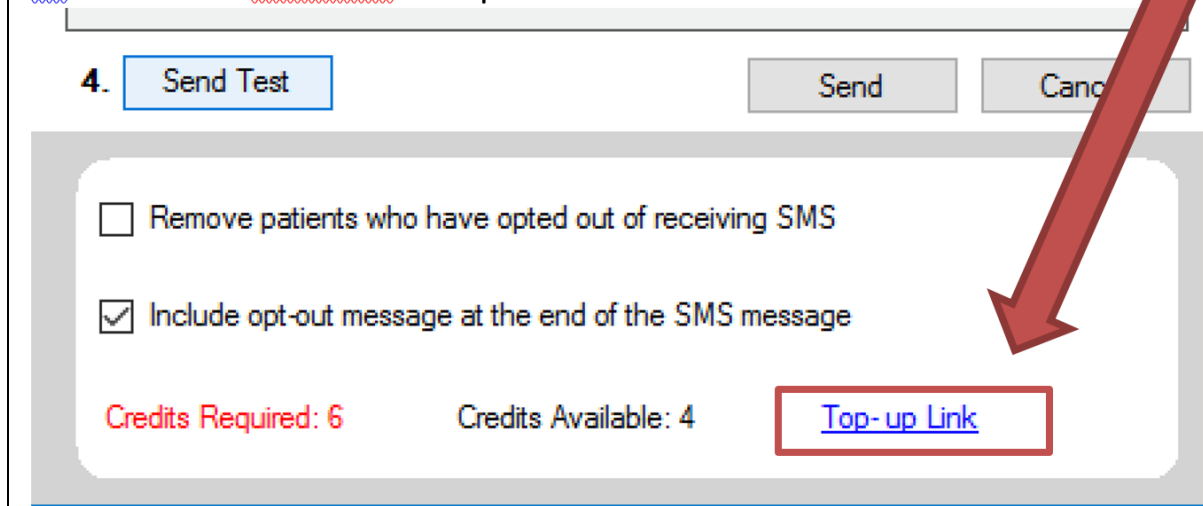
Appendix : Accessing additional SMS credits

If you don't have enough SMS credits, or you wish to top-up your SMS credits, there are 3 alternative methods:

- Self-service purchase by Credit Card (with Tax Invoice) – Top-Up Link
 - by clicking the Top-Up Link in GoShare Plus (see instructions below)
 - Either at bottom of GoShare Plus panel, or in the 'Send' pop-up which appears if there are not enough credits, OR
- Contact the GoShare Administrator in your health organisation who can purchase credits by using Credit Card in the GoShare Branch Admin area, OR
- Contact Healthily (03 9532 7444 or support@healthily.com.au) and we can manually add credits and send you an invoice.

Top-up Link

at bottom of GoShare Plus panel



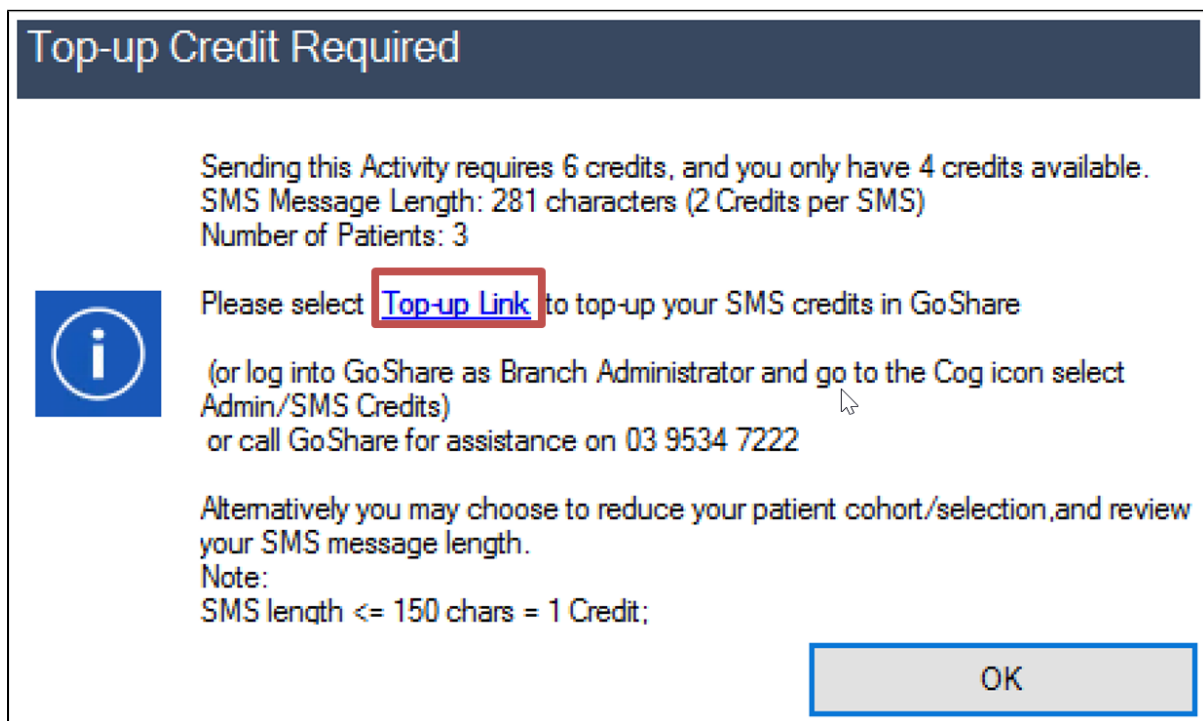
4. [Send Test](#) [Send](#) [Cancel](#)

☐ Remove patients who have opted out of receiving SMS

☒ Include opt-out message at the end of the SMS message

Credits Required: 6 Credits Available: 4 [Top-up Link](#)

Or from the pop-up that appears if you try to send without enough credits



Top-up Credit Required

Sending this Activity requires 6 credits, and you only have 4 credits available.
SMS Message Length: 281 characters (2 Credits per SMS)
Number of Patients: 3

Please select [Top-up Link](#) to top-up your SMS credits in GoShare
(or log into GoShare as Branch Administrator and go to the Cog icon select Admin/SMS Credits)
or call GoShare for assistance on 03 9534 7222

Alternatively you may choose to reduce your patient cohort/selection, and review your SMS message length.
Note:
SMS length <= 150 chars = 1 Credit;

[OK](#)

When you click the "Top-up Link"

- a separate Web Browser window will launch/open, and
- you will be logged into GoShare
- to the SMS Credits Admin screen for your Practice
- where you can select an SMS Credits package to purchase

HLV PHN - Healthily Medical Centre

PURCHASEHISTORY

Your branch has 450 credits available

excludes sending in progress, and Programs that are scheduled for future SMS delivery

| Product | Number of Credits | Cost per Credit | Total Cost (incl. GST) | |
|--------------------|-------------------|-----------------|------------------------|---------------------|
| 500 SMS Credits | 500 | \$0.250 | \$125.00 | Buy |
| 1,000 SMS Credits | 1,000 | \$0.230 | \$230.00 | Buy |
| 5,000 SMS Credits | 5,000 | \$0.180 | \$900.00 | Buy |
| 10,000 SMS Credits | 10,000 | \$0.150 | \$1,500.00 | Buy |


- Select a package and Click “Buy”
- You will then be re-directed to our payment provider (Stripe) for secure entry of your credit card details
- Once you have purchased the package you will be sent (to your email)
 - A receipt from Stripe
 - A Tax Invoice from GoShare

Stripe credit card entry screen

- enter your credit card details and click “Pay”
- if you don't wish to purchase now – click the GoShare Healthcare logo to return to the SMS Credits Admin screen

Healthily Pty Ltd


https://checkout.stripe.com/pay/cs_live_RPKpLcHOE3ejEyQ5pxSjx5AjSJ2RrPm6nXrofiYDqmnydUaLezzJdJzP#fidkdWxOYHwn



500 SMS Credits

A\$125.00

500 SMS credits

Powered by  | [Terms](#) [Privacy](#)




Pay with card

Email

neil.roberts+gsp@healthily.com.au



Card information

1234 1234 1234 1234



MM / YY

CVC



Name on card

Country or region

Australia

Pay A\$125.00

SMS Credits Tax Invoice – sent by email from GoShare

(example – test data only)

SMS Credits Purchase Confirmation and Tax Invoice



◦ GoShare <goshare@healthily.com.au>

To: ◦ neil.roberts+hfm@healthily.com.au



**GoShare
Healthcare**

Dear Neil H Family practice,

Thank you for your recent SMS credit purchase on the **GoShare** Healthcare platform.

Regards,

The **GoShare** Healthcare Team

For questions email : goshare@healthily.com.au or call 03 9534 7222

Tax Invoice:

| | |
|-----------------------|---------------------------|
| Branch/Practice Name | Healthily Family Practice |
| Order Number | 12 |
| Date | 11/2/2020 |
| Payment Method | Credit Card |
| Product | Test 50 |
| SMS Credits Purchased | 50 |
| Sub-Total | \$11.36 |
| GST (10%) | \$1.14 |
| Total Paid | \$12.50 |
| Balance | \$0.00 |

Healthily Pty Ltd ABN 78 613 342 635

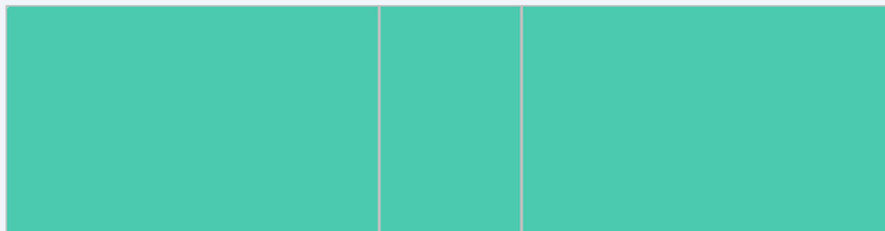
Stripe receipt (sent by email from Stripe) – example test data only

Your Healthily Pty Ltd receipt [#1969-4750]

o Healthily Pty Ltd <receipts+acct_1FzBw4IG8z7Tkqb6@stripe.com>

To: o neil.roberts+hfm@healthily.com.au

ct your privacy, some pictures in this message were not downloaded.



Receipt from Healthily Pty Ltd

Receipt #1969-4750

AMOUNT PAID

A\$12.50

DATE PAID

February 11, 2020

PAYMENT METHOD

– 6229

SUMMARY

Payment to Healthily Pty Ltd

A\$12.50

Amount paid

A\$12.50

If you have any questions, contact us at accounts@healthily.com.au or call at +61 3 9534 7222.

You can also access the "History Tab" to view the detailed SMS Credit transactions of your branch.



Your branch has 4 credits available

excludes sending in progress, and Programs that are scheduled for future SMS delivery

Start Date
End Date
10/02/2020

FILTER RESULTS

| | ID | Created | User | User Email | Detail | Product | Amount | Balance |
|--|-----------|---------------------|------------------|-----------------------------------|---------------------------------------|----------------|---------------|----------------|
| | 11 | 10/02/2020 02:29 PM | Neil Roberts GSP | neil.roberts+gsp@healthily.com.au | sms sent - BOwel almost 50 10 Feb 20 | | -2 | 0 |
| | 10 | 10/02/2020 02:29 PM | Neil Roberts GSP | neil.roberts+gsp@healthily.com.au | sms sent - BOwel almost 50 10 Feb 20 | | -2 | 2 |
| | 9 | 10/02/2020 02:29 PM | Neil Roberts GSP | neil.roberts+gsp@healthily.com.au | sms sent - BOwel almost 50 10 Feb 20 | | -2 | 4 |
| | 8 | 10/02/2020 02:28 PM | Neil Roberts GSP | neil.roberts+gsp@healthily.com.au | sms sent - Bowel Cancer Screening GSP | | -2 | 6 |
| | 7 | 10/02/2020 02:27 PM | Neil Roberts GSP | neil.roberts+gsp@healthily.com.au | sms sent - Bowel Cancer Screening GSP | | -2 | 8 |