



Hauora Wellness Plan Training

Technical tool support guide for general
practice teams

Better Health Outcomes
through Great Primary Care

PURPOSE

The purpose of this guide is to support General Practice staff in the Tū Ora network to utilise Te Ara Pae Ora to complete Hauora Wellness Plans with their patients. Use the contents below to navigate to the area of support you need.

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For further assistance, contact help@tearapaeora.org.nz

Version: v54

1. LOGGING IN TO TE ARA PAE ORA

With a patient selected, click on the 'Hauora Plan' icon on the toolbar.

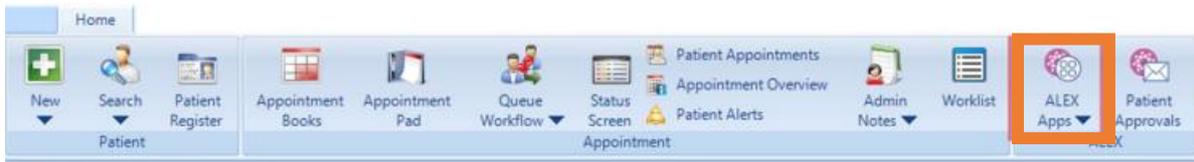


Figure 1: From ALEX Apps in Medtech Evolution

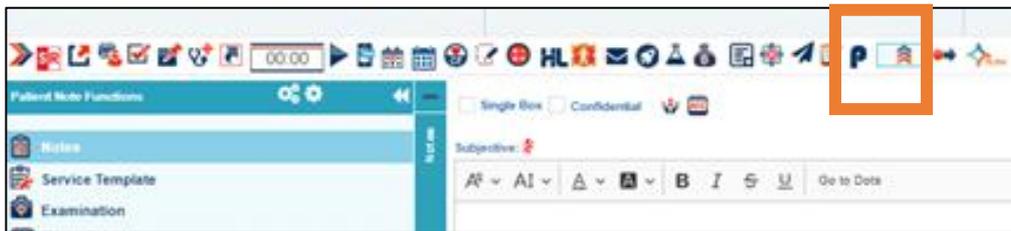


Figure 2: From the indici consultation toolbar in indici

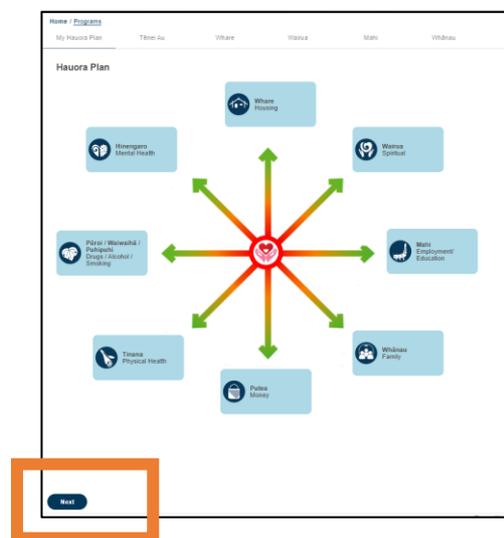
See appendix 1 for more options for logging in.

2. STARTING A HAUORA PLAN



Clicking on the icon from your PMS will start the **Hauora Plan** automatically.

Within the Hauora Plan is the Wellbeing Wheel. The eight elements on the Wheel guide whānau on a pathway through Mauri ora, Whānau ora and Wai ora to Pae Ora (Healthy Futures)



Click **'Next'** at the bottom of the screen to get started.

3. SAVING A HAUORA PLAN



To **save** the Hauora Plan, navigate to the results tab and click ‘**Save**’

You can **save** at any time. When you access the plan, the information will be saved ready to update.

4. TĒNEI AU (THIS IS ME)

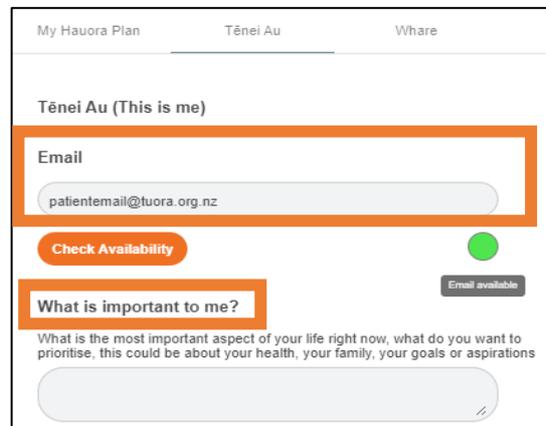


Demographic information will be pre-populated in the ‘Tēnei Au’ section from your PMS.

Check that this information is correct before proceeding.

Email

The email address must be filled in before the questionnaire can be completed.

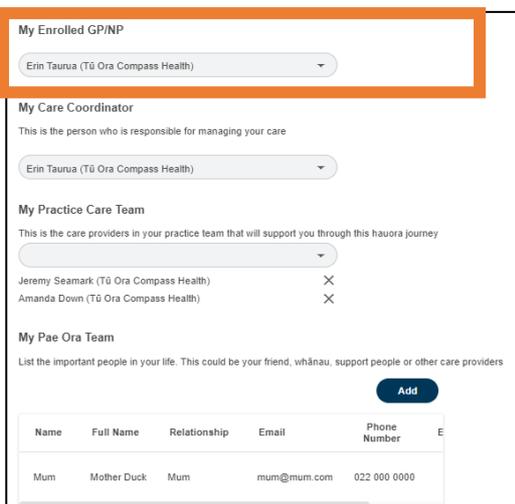


The purpose is to enable patients to access their information through the patient app, Te Ara Pae Ora.

Click ‘*Check Availability*’ to search if the patient has previously registered.

What is important to me?

Write down what matters most to the person. This can create a focus for your hauora plan and the goals you support. This doesn’t have to be health-related.



You must *select* an **Enrolled GP/NP** to link the Hauora Plan to your practice staff.



My Care Coordinator and **Practice Care Team** are members of your extended care team involved in the patient's care.

Pae Ora Team members are friends and whānau, support people and other care providers involved in the patient's care.

Click **Next** to go to the next section

5 HAUORA (HEALTH AND WELLBEING) SECTIONS



Navigate to the relevant hauora tabs to capture the patient’s wellness in each area of their wellbeing.

- Fill in as many areas as are relevant to your patient
- Be led by the patient and their kōrero.
- There are no right or wrong answers.

Each of the Hauora areas is setup in the same way:

- 5.1 How are you feeling?
- 5.2 My Kōrero
- 5.3 Goals
- 5.4 Support Areas

Whānau Family

Overall, do you feel you have support systems around you?

5.1

My Kōrero

You may choose to write about the important people in your whānau, issues that your whānau need support with or your dreams and aspirations for your whānau.

I am current hapū with my first baby. My partner and I are so excited to welcome him in February next year.

5.3

Goals and Planned Actions

+ Goal

Look after myself during pregnancy

+ Task

Name	Description	Assignee	Due Date	Status	Edit
Share Antenatal...	Link to all loc...	Erin Taurua (Tū Ora Compass Health)	2023-10-29	Draft	✎

5.4

Need further help?

🔍 See more services...

Already Selected Services

No services selected yet.

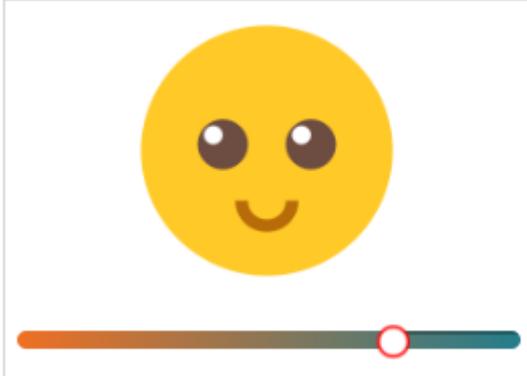
Back
Next

5.1 UPDATE WELLNESS SCALE

Drag the **slider** to record how the patient feels about this area of their hauora.

- Complete as many areas as possible to show where the focus areas might be.
- The results will be displayed on the wellness wheel

Overall, do you feel you have support systems around you?



5.2 'MY KORERO'

My Kōrero is an opportunity for the patient to talk about their experiences and aspirations for each hauora section. Write your notes here from your kōrero.

My Kōrero

You may choose to write about the important people in your whānau, issues that your whānau need support with or your dreams and aspirations for your whānau.

I am current hapū with my first baby. My partner and I are so excited to welcome him in February next year.

5.3 GOALS AND ACTIONS

Add goals and planned actions (tasks) that can help the patient improve their overall wellness in this area.

- Click '+ Goal'
- Enter Goal and click Save
- Click '+ Action'
- Enter task details and click save

Goals and Planned Actions

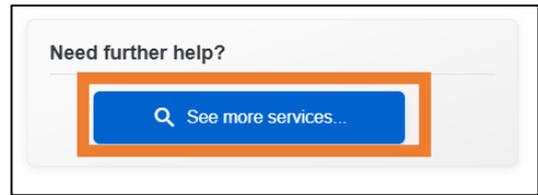


- Click the pencil icon to edit the task or goal 
- Assignees will be assigned the task once the plan has been completed. They can decline or accept the task.

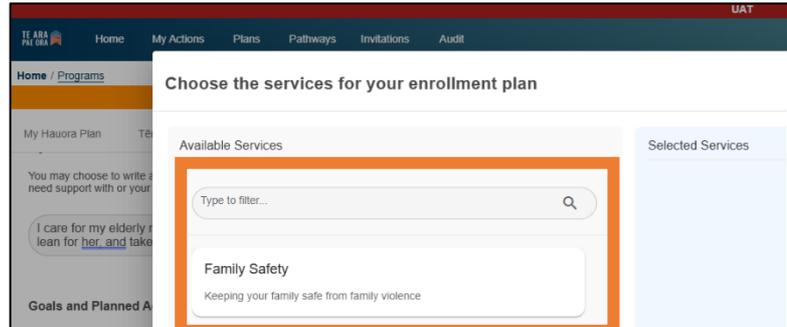
See [Hauora Wellness Plan Goal Prompts](#) for ideas on goals associated with specific conditions.

5.4 FIND SUPPORT

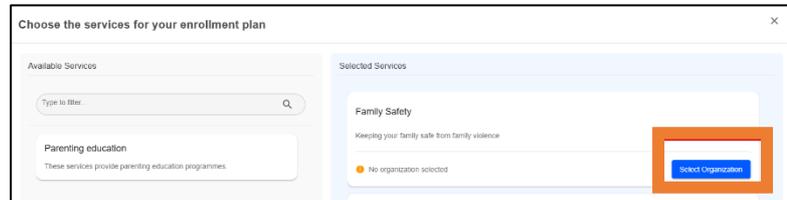
To view available services, select **'See more services'**



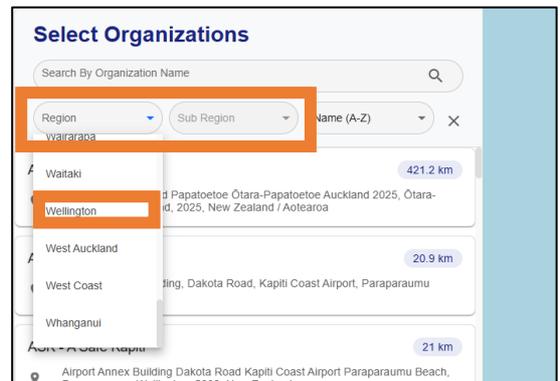
Select all relevant support categories



Click **'Select Organisations'** to view resources and organisations that can support

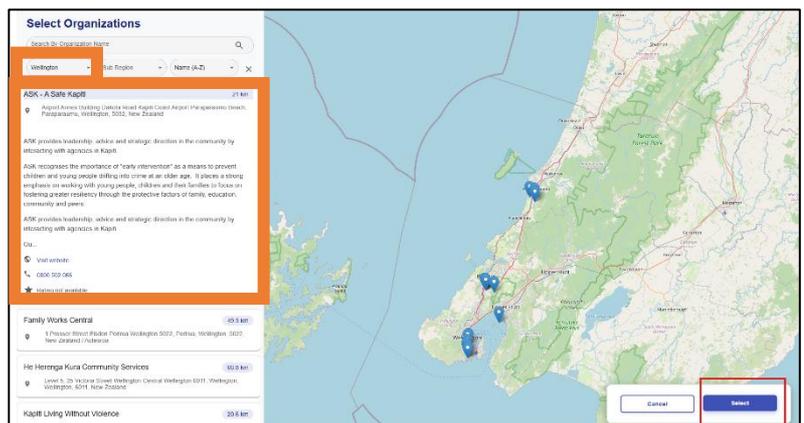


Filter the services list using the region filter, selecting a pin on the map or by searching for an organisation directly.

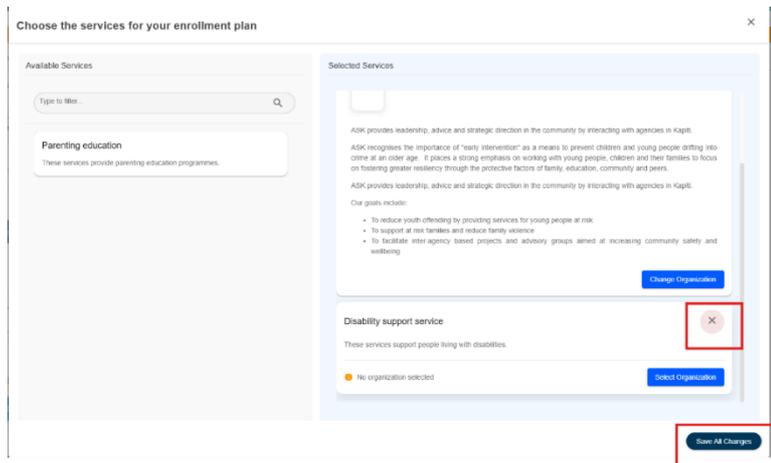


Click on the pin, or the organisation name to view more information.

If a service looks useful, Click **'Save'**



!
If you do not want to select a service, click X to unselect the support category



Click **Save All Changes** to save the selected organisations

Click **Next** to go to the next relevant hauora section.

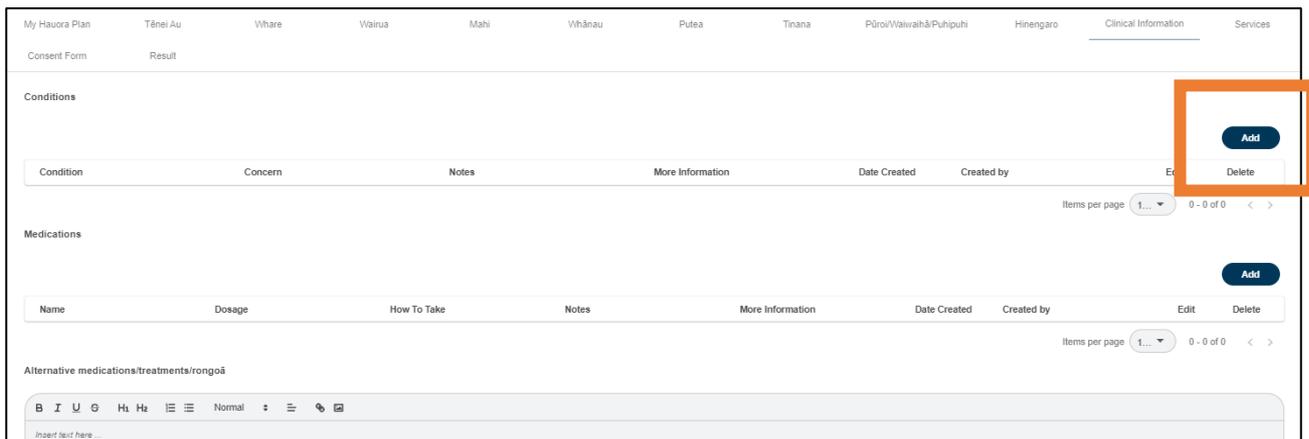
6 ADD CLINICAL INFORMATION



Long-term conditions and medications will be pre-populated from the PMS.

The 'Clinical Information' tab is an opportunity to capture medical information that might be a concern or a priority.

Select **'Add'** to add Conditions and Medications to add further information.



Click **Next** to go to the next tab.

7 GAIN CONSENT



Click 'I Agree' and digitally sign the consent form (or print and upload consent form)

8 SAVE THE HAUORA WELLNESS PLAN



Go to the **Result** page to save your hauora plan.

From the results page you can view:

- the wellness wheel results
- a summary of the kōrero, goals and supports

When you are finished, select the 'Save' button to save the changes.



9 VIEW OR PRINT PDF SUMMARY

Once you have completed a hauora plan, you will be navigated to the **Plans** menu. You will see a list of hauora plans completed by your practice.

Click the *Report* icon to print or save PDF of the the Hauora Plan Summary



Plan Type	Full Name	Created by	Date	Actions	Patt
	MICKEY MOUSE NHI: HTP1755 email: tearapaeoramickey@gmail.com	tammy.mcgregor.1	04.06.2025 13:50	   	

Select either the Print or Download button.

TE ARA PAE ORA **Hauora Care Plan**

Date: 22.02.2023

10 SEND REPORT TO MEDTECH INBOX

Medtech practices with ALEX integration enabled can send the hauora report directly to the patient inbox.

Click the 'Medtech Report' icon on the Plans menu to send the summary to the patient inbox

e	Actions
17.2024 :0	   

11 UPDATE A HAUORA PLAN

You can update a hauora wellness plan at any time. This could be when you recall the patient for their annual review, or when you see them in a consultation.

Click on the 'Hauora Plan' icon from your PMS. This will open the previous Hauora plan and allow you to update or edit

- Go to the Results tab to review the summary of the current plan
- Then update the areas of the Hauora plan that are relevant.

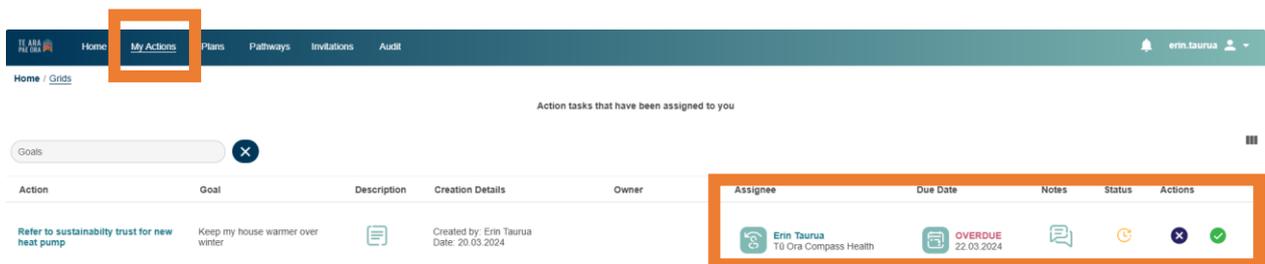
Click 'Save' in the Results tab to save the updated Hauora Plan

12 MANAGING ACTIONS

Actions that have been assigned to you will be listed in the My Actions menu.

From this menu, you can:

- Accept or decline the action
- Add progress notes
- View previous progress notes.
- Re-assign the task to another care team member
- Update the due date
- Edit the task or description



13 CONNECTING TO TE ARA PAE ORA (PATIENT APP)

Patients can continue their Hauora Wellness Journey with the Te Ara Pae Ora app.

The Hauora plan is linked to Te Ara Pae Ora using the e-mail address that is used in their Hauora Plan.

After a Hauora Plan is completed, the patient can:

1. Download the 'Te Ara Pae Ora' app or visit www.tearapaeora.nz
2. Register using the e-mail address used for your Hauora plan
3. Receive an email to activate your account
4. Add their own secure password

Now the patient can login to view and update their hauora plan via Te Ara pae Ora. Updates will be available to view from the Hauora Plan

HAUORA PLAN - TRAINING ACTION PLAN

This training action plan is for clinicians/practitioners who are working in General Practices and have attended the Hauora Wellness Plan training. It can be used to confirm understanding of the Hauora Wellness Plan and how it can be used in Practice.

Other relevant templates, screenshots and step-by-step resources are found in the **Hauora Wellness Plan** guide document.

Before Hauora Wellness Plan Consultation

1. Who in your practice will be coordinating Hauora Plans?

2. How will you select patients who will benefit from hauora Planning? How can you ensure this process supports an equitable focus for your high needs' patients?

3. How might you personally explain the Hauora Wellness Plan approach to the people who you think will benefit from Hauora Planning?

During Hauora Wellness Plan Consultation

The care co-ordinator is expected to **facilitate and guide the session**, however the plan has been designed to be **patient-led**.

This may involve exploring with the person what is important to them in life, to help them aspire to looking after their own health in a different way.

1. How might you discuss with the person in the consultation; That whānau is an important part of hauora?

2. Mickey Mouse is asthmatic and lives in a cold, damp home. He is worried that he will need to go back into hospital this winter.

Create a Hauora Plan for Mickey Mouse and add a goal and tasks that reflects his concern about his asthma.

- I was able to create a Hauora Plan for Mickey Mouse
- I added his kōrero
- I added a goal in the _____ area of his hauora
- I found useful support service information that can help Mickey stay well this winter.

3. Where in the Hauora Wellness Plan can you update how someone is feeling in each area of their hauora?

4. Where do you think General Practice mahi fits within the wider picture of your patient's hauora journey?

Other thoughts and reflections

1. Write in this box any areas related to this kaupapa that you are not familiar with addressing.

2. What can I do in my role to support a holistic approach to wellbeing for my patients?

TROUBLESHOOTING

Common Questions and Answers

1. Why isn't the Hauora Plan I just completed in the 'Pae Ora Plans' List?

Ensure you have selected **'My Enrolled GP/NP'** in the Tēnei Au section of the Hauora Wellness Plan. This links the plan with your practice team list.

To add Enrolled GP/NP in the hauora plan:

- Open the hauora plan
- Go to the Tēnei Au section
- Select the 'Enrolled GP/NP' from the dropdown list (see step 4 in the guide)
- Click save on the Results page.

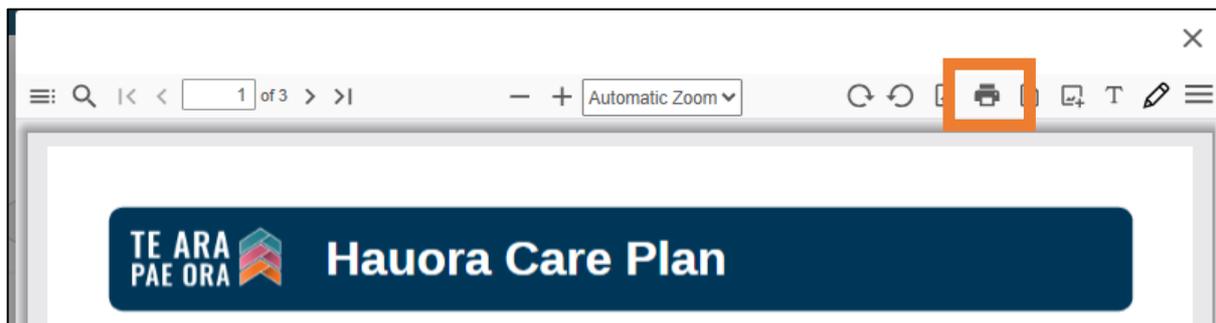


My Enrolled GP/NP
Erin Taurua (Tū Ora Compass Health)

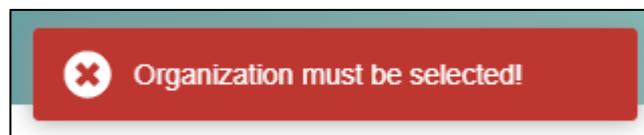
2. I forgot to print the Hauora Plan for my patient, How can I print it again?

You can view and print previous plans at any time from 'Plans'

- Go to the Plans Menu
- Click the Summary Report Icon (in Action Column)
- Click the Print icon



3. I am trying to complete my plan and getting an error that says "Organisation must be selected"



This means that a support area has been selected but no organisation has been assigned to this support area.

- Go back to the hauora section with selected support category
- Select an organisation for each support category or Click X to remove the category if no services are appropriate or available.

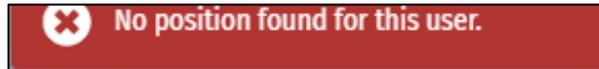
4. I am having trouble logging in

You may not have been granted access to Te Ara Pae Ora or your account may be inactivated if you have not logged in within 60 days.

Check your Te Puna account is unlocked with your practice manager or email help@tearapaeora.org.nz for further support.

For new staff, contact help@tearapaeora.org.nz to set them up with access.

5. I am getting the error message “No position found for this user”



There is an issue with your setup configuration.

You may not have been granted access to Te Ara Pae Ora **or** there is an issue with your setup configuration.

Contact admin-tepuna@tuora.org.nz to resolve this issue.

APPENDIX 1 – LOGGING INTO TE ARA PAE ORA

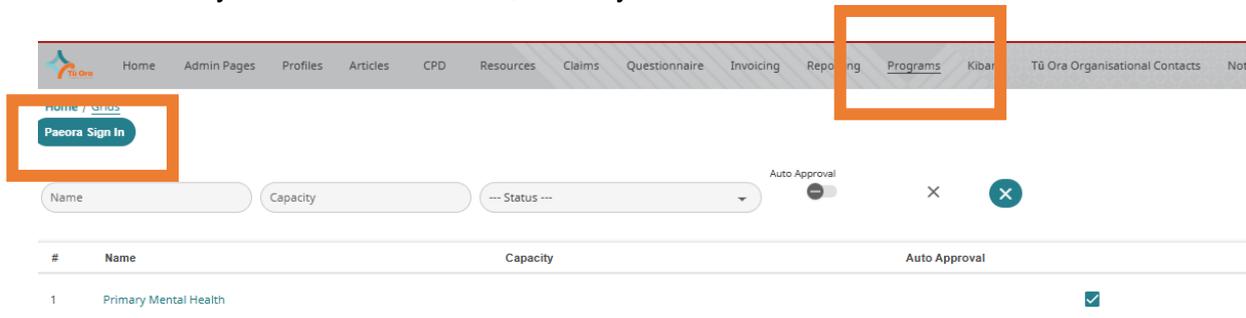
You can log into Te Ara Pae Ora in multiple ways. From:

- Te Puna
- Web Browser
- Indici
- Medtech

Te Puna

1. Log into Te Puna by visiting <https://tepuna.tuora.org.nz/>
2. Select 'Programs' from the top menu
3. Select the 'Paeora Sign In' Button.

This will take you to Te Ara Pae Ora, where you can create the Hauora Plan.

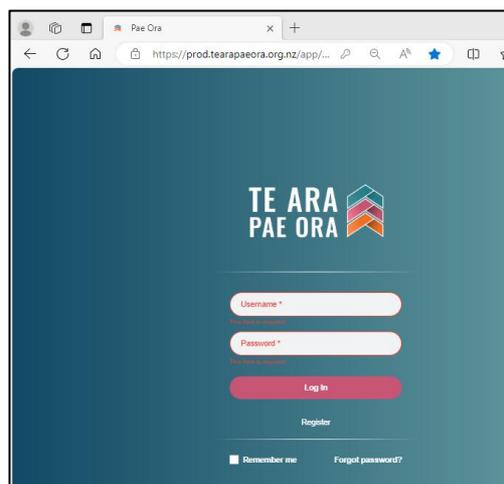


If you cannot see the programs menu or Pae Ora sign In button, you have not been granted access to Te Ara Pae Ora. Please send request to help@tearapaeora.org.nz

Web browser

1. Log into Te Ara Pae Ora by visiting <https://prod.tearapaeora.org.nz/>
2. Login using your Te Puna credentials.

Trouble logging in? See troubleshooting guide or help@tearapaeora.org.nz

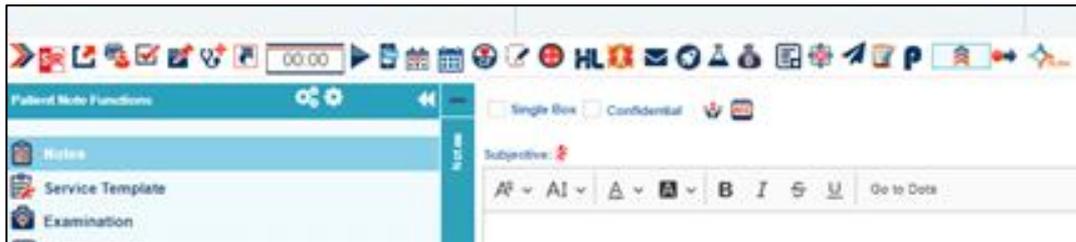


indici

Accessing Hauora Wellness Plan with NHI number in context

From the consult screen, click the Te Ara Pae Ora icon, this will log you into Te Ara Pae Ora with the NHI number loaded ready to start a Hauora Wellness Plan.

Demographics and Long-term conditions of the patient will be pre-populated into the Hauora Wellness Plan.



If you cannot see the icon, click the arrow to expand the menu

Access via the Provider Dashboard and Admin Dashboard

Simply click the Te Ara Pae Ora icon on the dashboard, and Te Ara Pae Ora will load. Te Ara Pae Ora will log you in automatically onto the Home screen.



Please contact help@tearapaeora.org.nz if you have any issues with SSO or if you'd like training on the Te Ara Pae Ora features.

Medtech Evolution

With a patient on the pallet, Click on the Hauora Plan icon from the ALEX apps on the main ribbon to open a Hauora Plan.

