care Information Exchange

Patient Enrolment Guide

## Document Control

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# Purpose of this document

The purpose of this document is to provide participating organisations with a guide on how to enrol patients to access their records on the Care Information Exchange.

**This document assumes that the CIE record creation has already been completed either manually or through system integration.**

# Patient Enrolment

## High level approach

When enrolling new patients to access their records on the Care Information Exchange the steps need to be completed:

1. Explain what CIE is for (using CIE sign-up script and supporting materials, see section 3 below)
2. Find patient on system
3. Check photo ID (see patient identity verification below)
4. Record patient consent
5. Record email address
6. Provide information sheets

The steps can be done all together by one person with the patient present. This has the advantage that the patient can enter their own email address and the activation email is generated immediately. The entire process takes under four minutes (depending on how many questions a patient has).

In the context of a short appointment or a busy waiting room four minutes may be considered too long. In this case there are some different ways to break up the process.

The explanation of what CIE is can be done by one person and the sign up by another. For example, a clinician might do the explanation and an administrative role might do the sign-up.  This has the advantage that the clinician is the best person to recommend CIE, and this will then save time for the administrative staff who can go straight into the system sign-up. The disadvantage is that both people need to be available to complete the process.

Another option is to separate out the steps that have to be done with the patient present from those that can be done later. Everything that is done on the system can be done later (find patient, recording consent, and adding email address). The other steps including taking note of consent need to be done with the patient present. This has the advantage of shortening the time needed in busy periods. The disadvantage is there is a greater chance of error (e.g. in noting and then entering email), or non-completion of the account setup.

A form being used at Imperial College Healthcare NHS Trust to capture patient information is included in the supporting materials section of this document below.

## Patient identity verification

In order to verify that a person is the person they claim to be, the requirement is for patients to provide one of the following three forms of photo identification:

* Passport
* Driving licence
* Other photo ID accompanied by a clinic letter presented on a corresponding date and time

# Sign up script and supporting materials

The following materials are examples currently in use at Imperial College Healthcare NHS Trust. These will require minor amendments for use by other organisations and services.

## Sign-up script

### Opening

1. Introduction – Who we are?

2. Did you receive a text?

* Yes
  + Still interested? – go to Step 3
  + Not interested? - ask patient if they would like to be removed from receiving future text reminders about CIE if Yes, make a note of this> hand list/note to Ali to add to the log> End
* No – go to Step 3

3. CIE background/intro. (Who can access it? What it can do now and what it will be capable of doing in the future)

4. Would you like to sign up and have access to your own medical records?

* Inform the patient that this will require giving the Rheumatology Team access to their ‘General Health’ records
* Inform patient that once they have activated their account they can modify sharing preferences and allow the Rheumatology Team to view other parts of their records e.g. ‘Social Care’, ‘Mental Health’ & ‘Sexual Health’

5. You will need to have your own email personal address? ((Optional) Creating email account guide).

### Features:

* Outpatients Appointments.
* Inpatient Activity – ED & ward attendances.
* Results – Viewing blood test and x-ray results.
* Control the information that you share and whom you share it with.

### Benefits:

* Peace of Mind – Give access to your record on the Care Information Exchange to any health or care professional that needs to see it. Instead of needing to explain history to each new health or care professional.
* Convenience – Manage your healthcare from the comfort of your own home.

Time-saving – Reduce the time you need to spend attending routine medical appointments that can be done more efficiently remotely or online.

### Close:

1. Registration emails will be titled ‘Patient Know Best’ and can sometimes go to Junk / Spam.

## Quick reference Guide



## Patient hand-out materials



## Patient sign-up form

