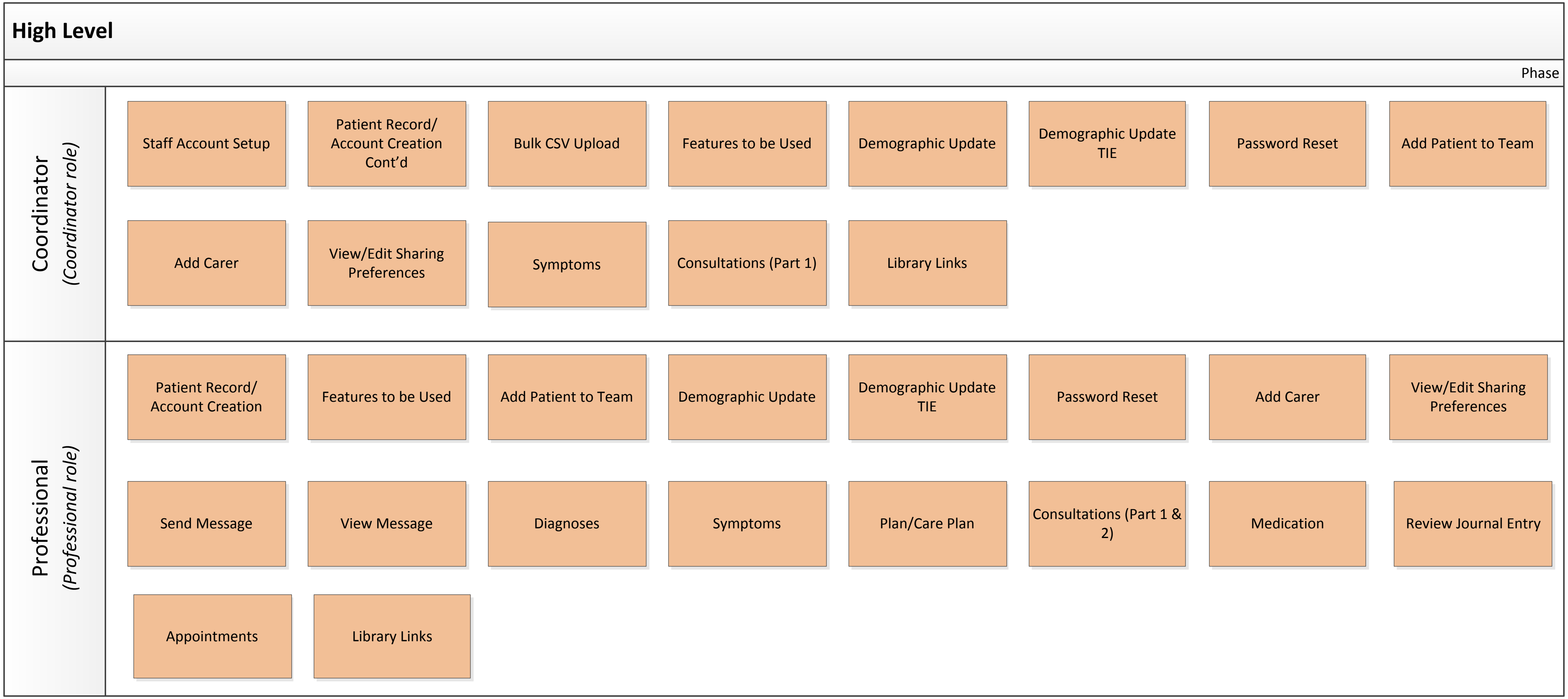
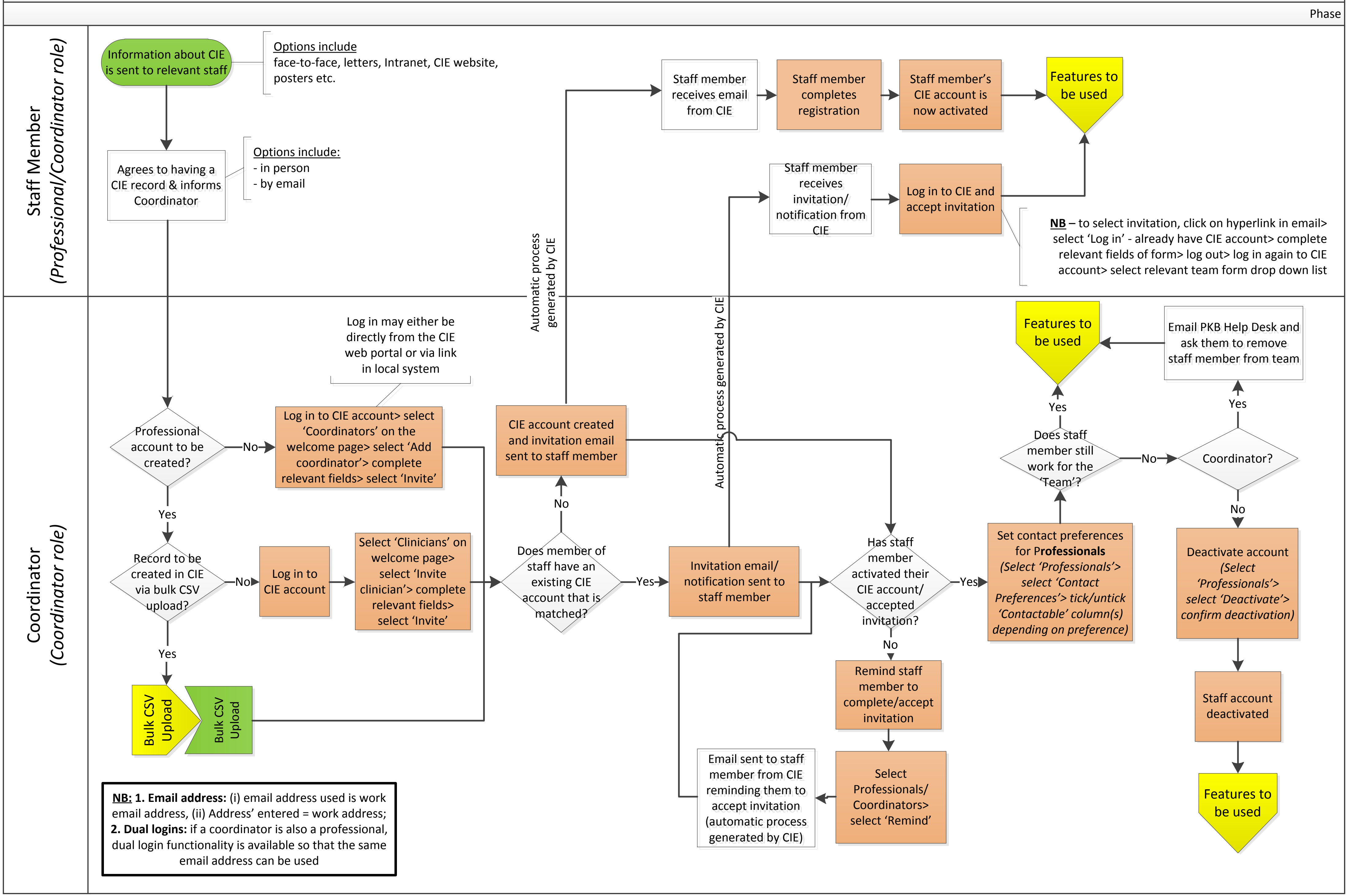

High Level
Phase
Coordinator
(Coordinator role)
Staff Account Setup
Patient Record/ Account Creation Cont'd
Bulk CSV Upload
Features to be Used
Demographic Update
Demographic Update TIE
Password Reset
Add Patient to Team
Add Carer
View/Edit Sharing Preferences
Symptoms
Consultations (Part 1)
Library Links
Professional
(Professional role)
Patient Record/ Account Creation
Features to be Used
Add Patient to Team
Demographic Update
Demographic Update TIE
Password Reset
Add Carer
View/Edit Sharing Preferences
Send Message
View Message
Diagnoses
Symptoms
Plan/Care Plan
Consultations (Part 1 & 2)
Medication
Review Journal Entry
Appointments
Library Links

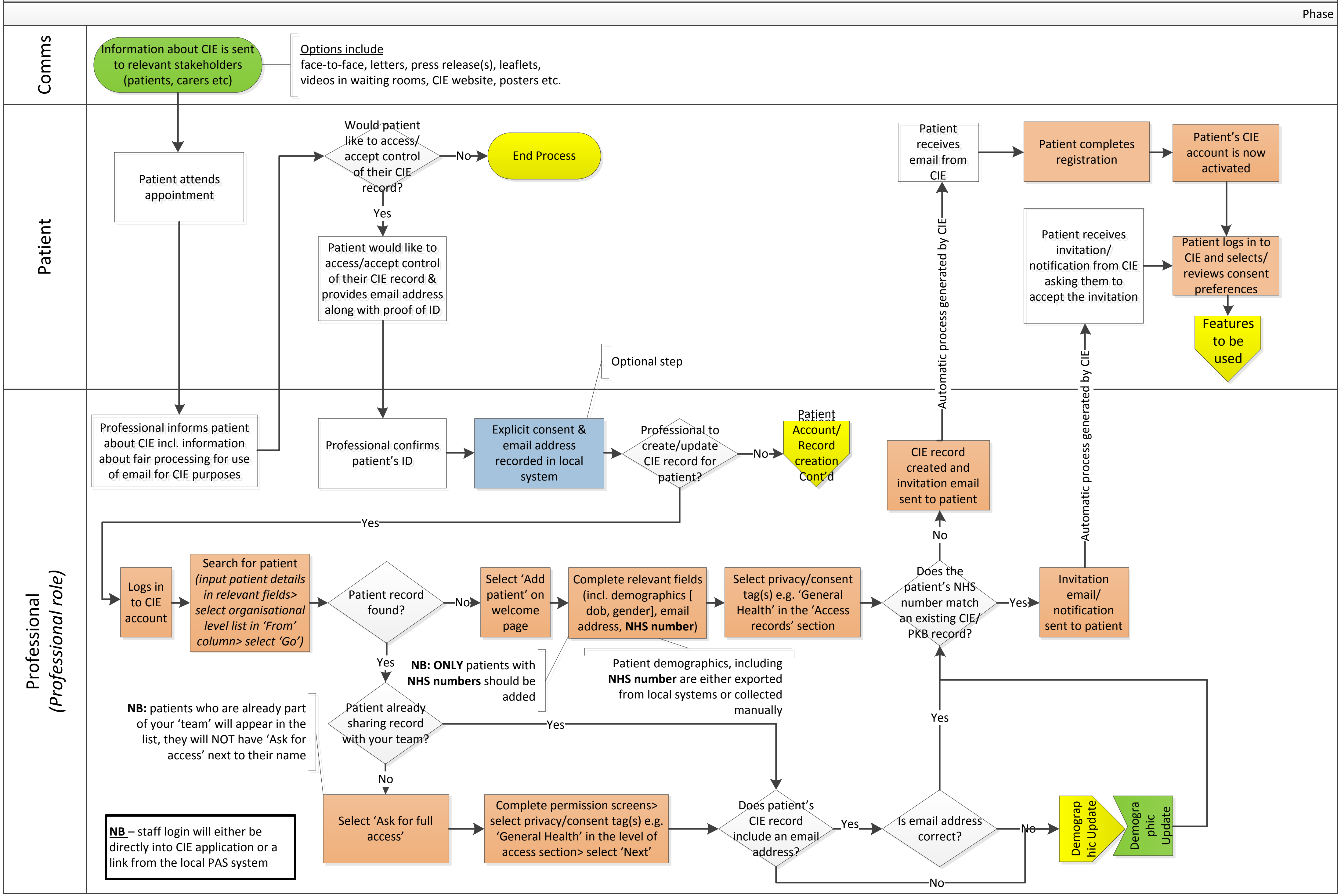
## Features to be Used

| | Phase |
|---|---|
| **Coordinator** *(Coordinator role)* | Demographic Update; Demographic Update TIE; Password Reset; Add Patient To Team; Add Carer; View/Edit Sharing Preferences; Consultations (Part 1); Library Links |
| **Professional** *(Professional Role)* | Demographic Update; Demographic Update TIE; Password Reset; Add Patient To Team; Add Carer; View/Edit Sharing Preferences; Send Message; View Message; Plan/Care Plan; Consultations (Part 1 & 2); Review Journal Entry; Library Links; <u>Misc features</u> (when integration is in place): • View pathology results • View radiology reports • View clinic appointments • View clinic/referral/discharge letters |

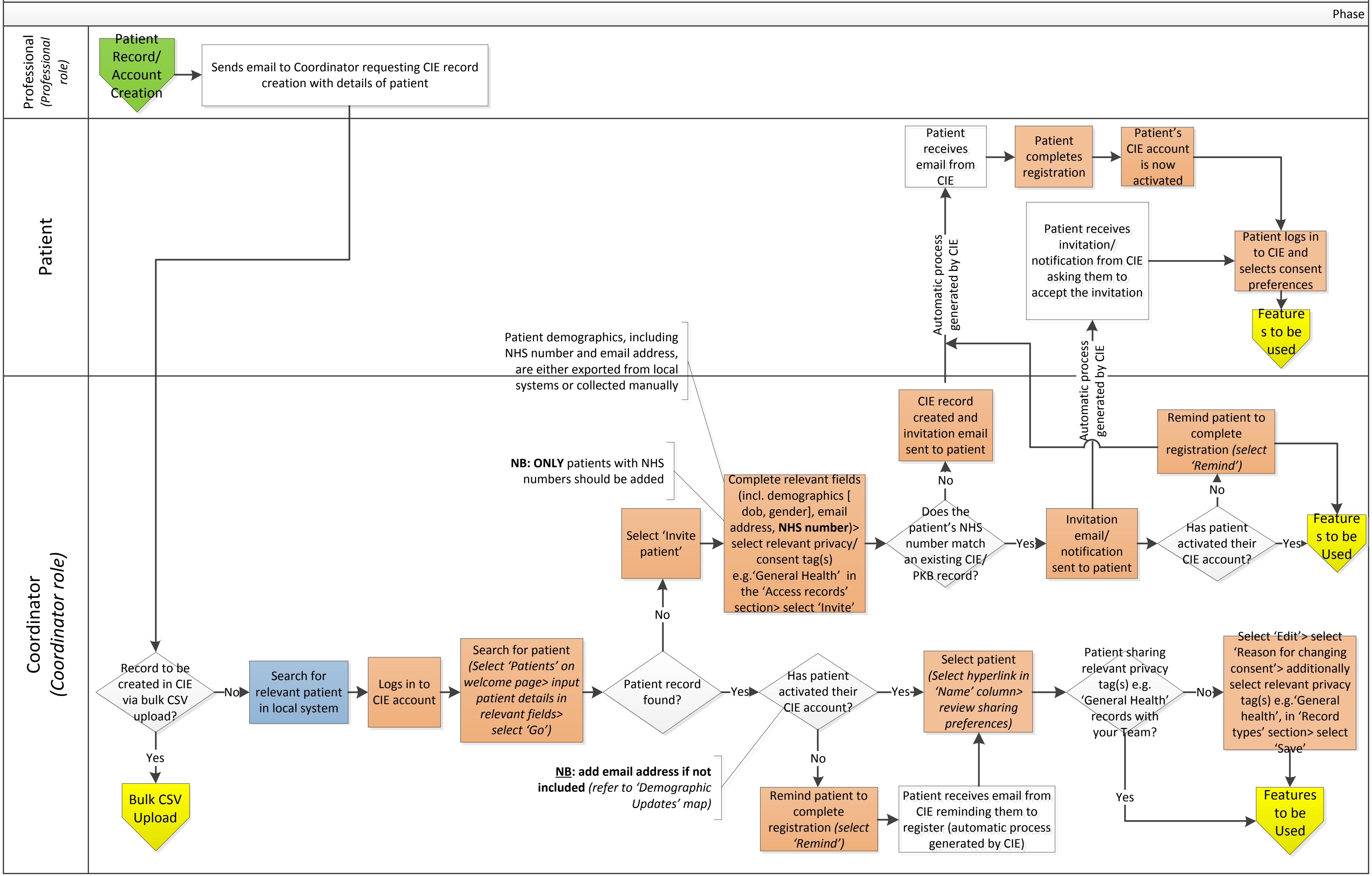
# **Staff Account Setup -** New Starters & Leavers

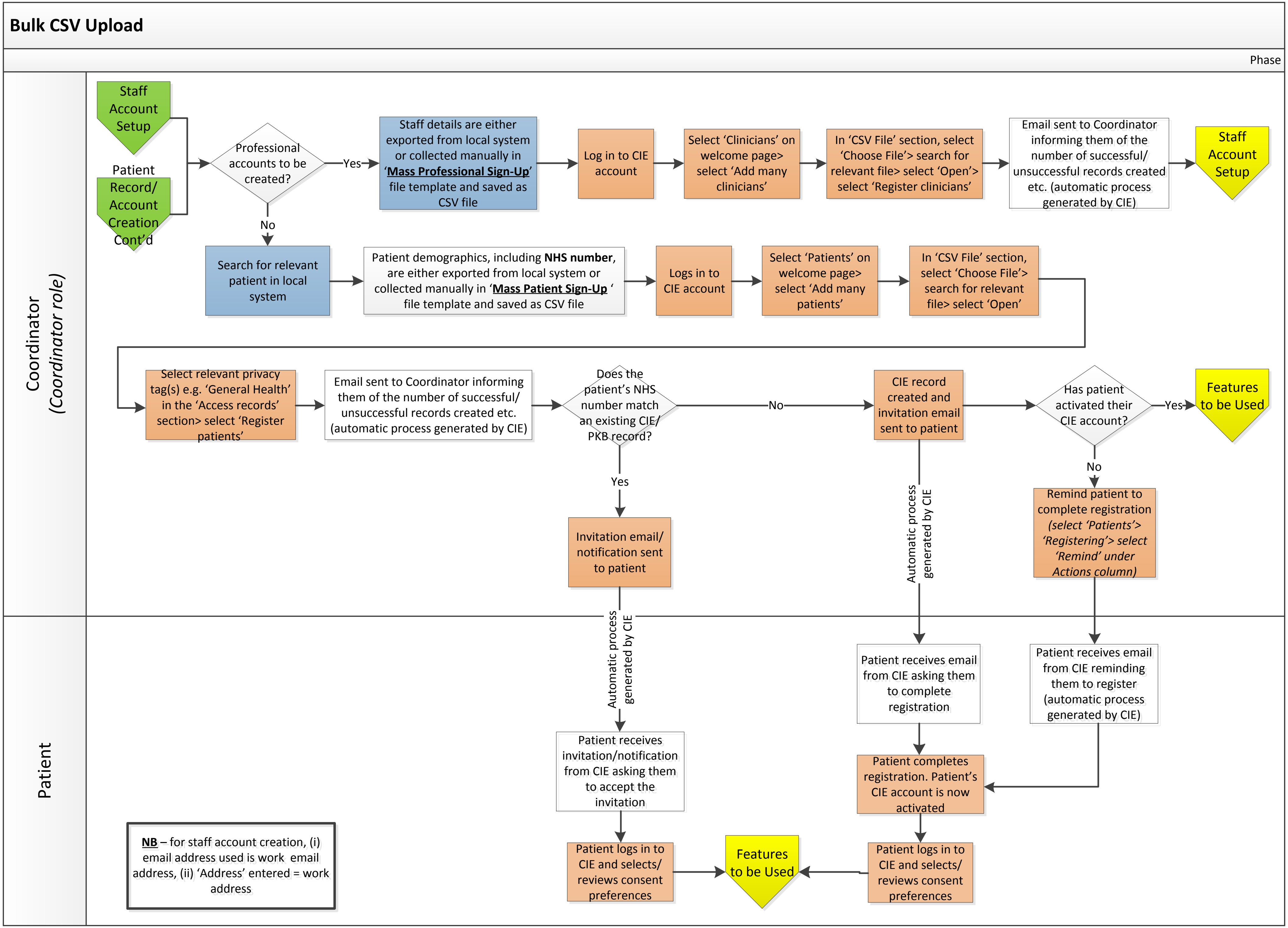


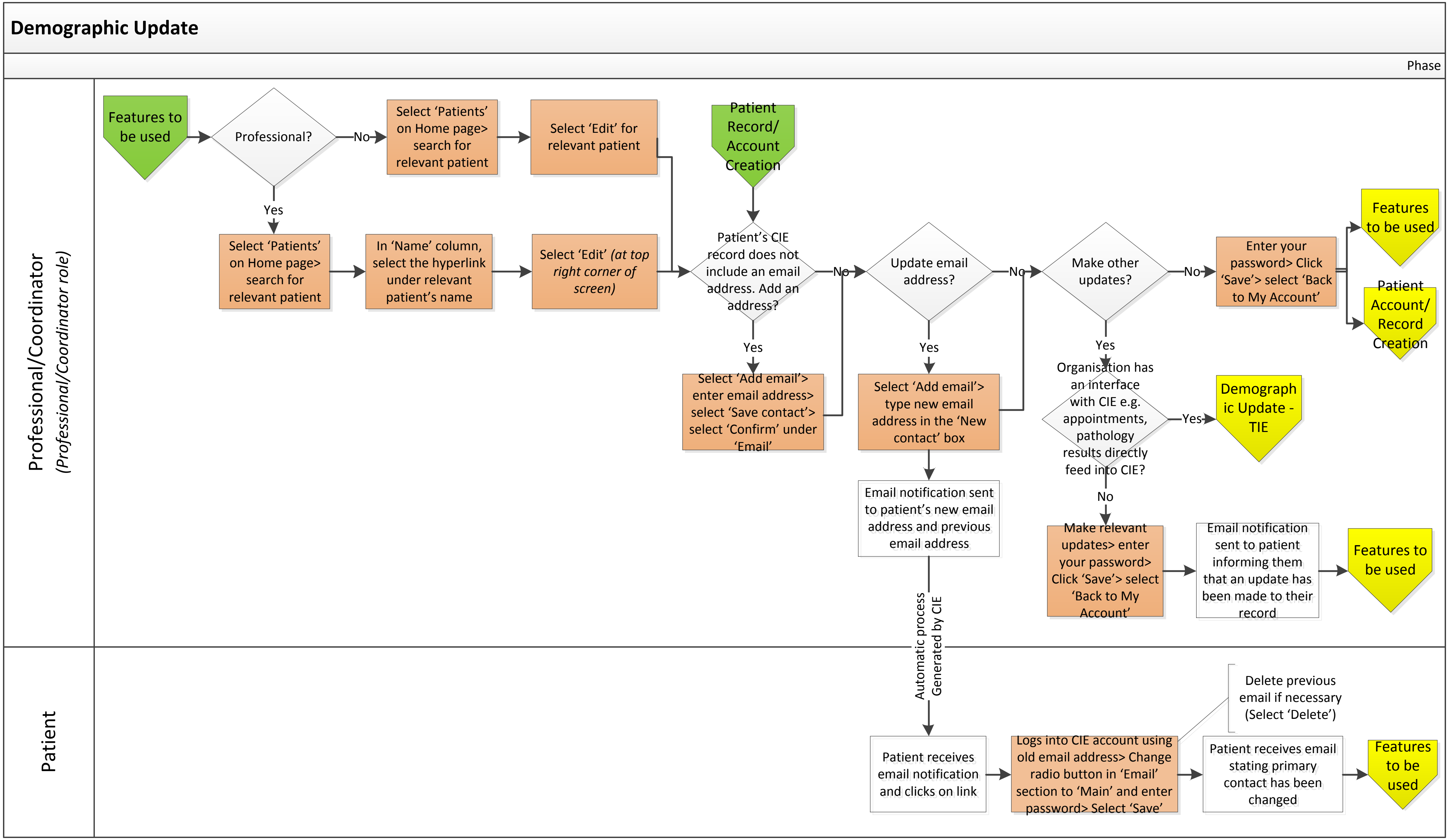
# Patient Record/Account Creation

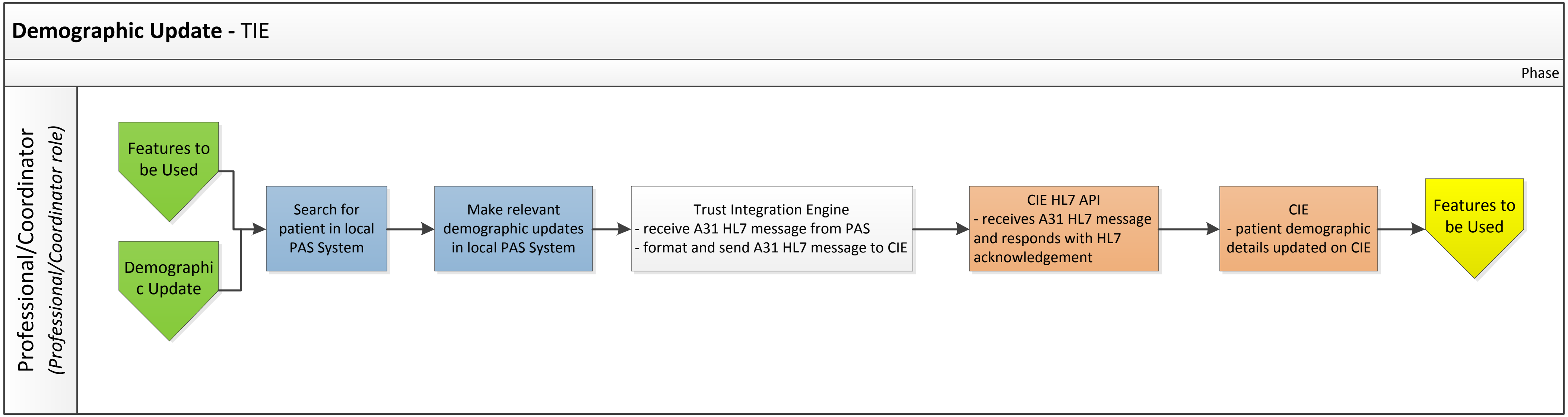


**Patient Record/Account Creation Cont'd** (no integration between CIE & local systems)



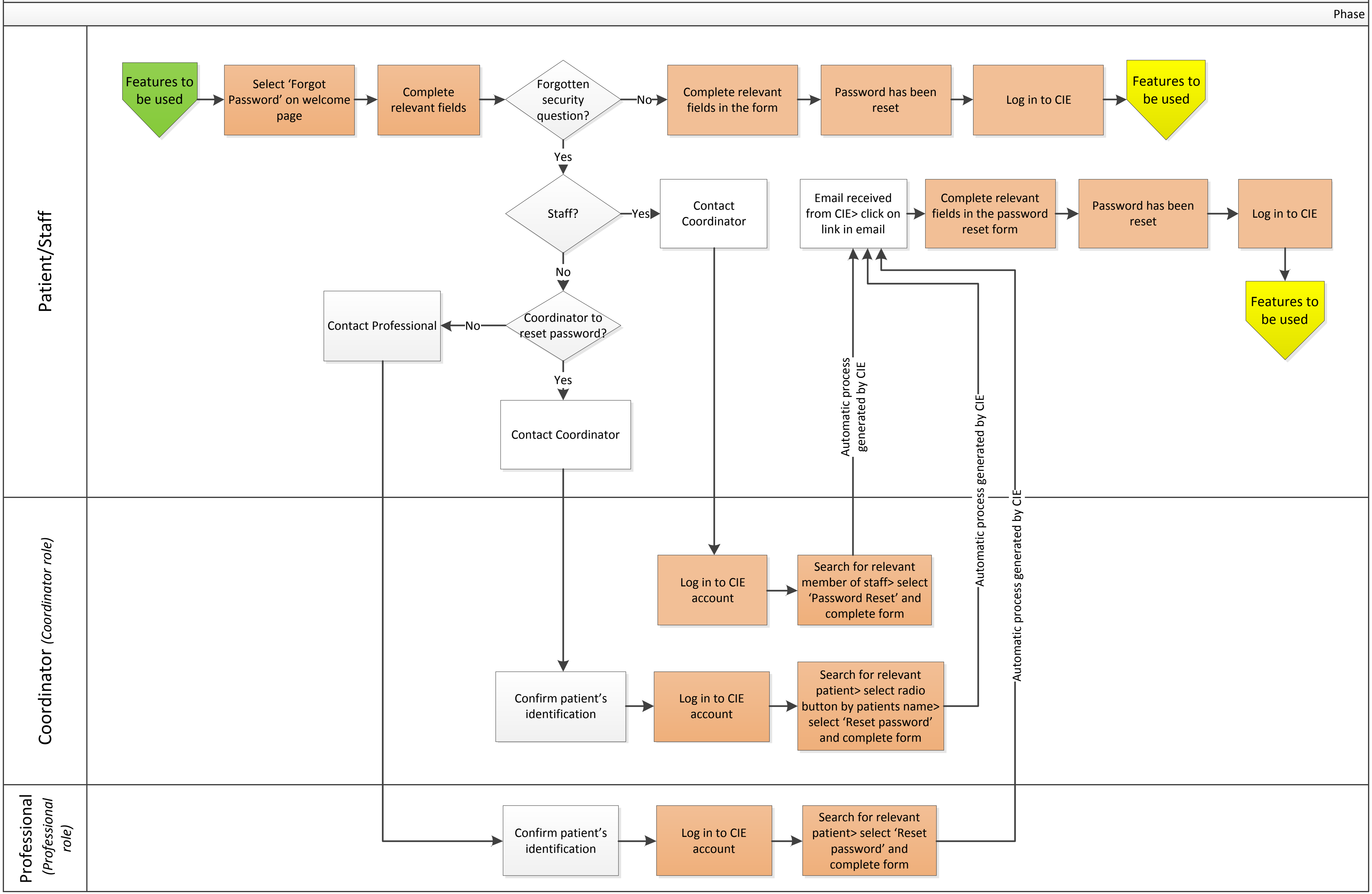

Bulk CSV Upload
Phase
Coordinator (Coordinator role)
Patient
Staff Account Setup
Patient Record/ Account Creation Cont'd
Professional accounts to be created?
Yes
No
Staff details are either exported from local system or collected manually in 'Mass Professional Sign-Up' file template and saved as CSV file
Log in to CIE account
Select 'Clinicians' on welcome page> select 'Add many clinicians'
In 'CSV File' section, select 'Choose File'> search for relevant file> select 'Open'> select 'Register clinicians'
Email sent to Coordinator informing them of the number of successful/ unsuccessful records created etc. (automatic process generated by CIE)
Staff Account Setup
Search for relevant patient in local system
Patient demographics, including NHS number, are either exported from local system or collected manually in 'Mass Patient Sign-Up ' file template and saved as CSV file
Logs in to CIE account
Select 'Patients' on welcome page> select 'Add many patients'
In 'CSV File' section, select 'Choose File'> search for relevant file> select 'Open'
Select relevant privacy tag(s) e.g. 'General Health' in the 'Access records' section> select 'Register patients'
Email sent to Coordinator informing them of the number of successful/ unsuccessful records created etc. (automatic process generated by CIE)
Does the patient's NHS number match an existing CIE/ PKB record?
No
Yes
CIE record created and invitation email sent to patient
Has patient activated their CIE account?
Yes
No
Features to be Used
Invitation email/ notification sent to patient
Automatic process generated by CIE
Automatic process generated by CIE
Remind patient to complete registration (select 'Patients'> 'Registering'> select 'Remind' under Actions column)
Patient receives invitation/notification from CIE asking them to accept the invitation
Patient receives email from CIE asking them to complete registration
Patient receives email from CIE reminding them to register (automatic process generated by CIE)
Patient completes registration. Patient's CIE account is now activated
Patient logs in to CIE and selects/ reviews consent preferences
Features to be Used
Patient logs in to CIE and selects/ reviews consent preferences
NB – for staff account creation, (i) email address used is work email address, (ii) 'Address' entered = work address


Demographic Update
Phase
Professional/Coordinator
(Professional/Coordinator role)
Patient
Features to be used
Professional?
No
Yes
Select 'Patients' on Home page> search for relevant patient
Select 'Edit' for relevant patient
Patient Record/ Account Creation
Select 'Patients' on Home page> search for relevant patient
In 'Name' column, select the hyperlink under relevant patient's name
Select 'Edit' (at top right corner of screen)
Patient's CIE record does not include an email address. Add an address?
Update email address?
Make other updates?
Enter your password> Click 'Save'> select 'Back to My Account'
Features to be used
Patient Account/ Record Creation
Select 'Add email'> enter email address> select 'Save contact'> select 'Confirm' under 'Email'
Select 'Add email'> type new email address in the 'New contact' box
Organisation has an interface with CIE e.g. appointments, pathology results directly feed into CIE?
Demographic Update - TIE
Email notification sent to patient's new email address and previous email address
Make relevant updates> enter your password> Click 'Save'> select 'Back to My Account'
Email notification sent to patient informing them that an update has been made to their record
Features to be used
Automatic process Generated by CIE
Delete previous email if necessary (Select 'Delete')
Patient receives email notification and clicks on link
Logs into CIE account using old email address> Change radio button in 'Email' section to 'Main' and enter password> Select 'Save'
Patient receives email stating primary contact has been changed
Features to be used

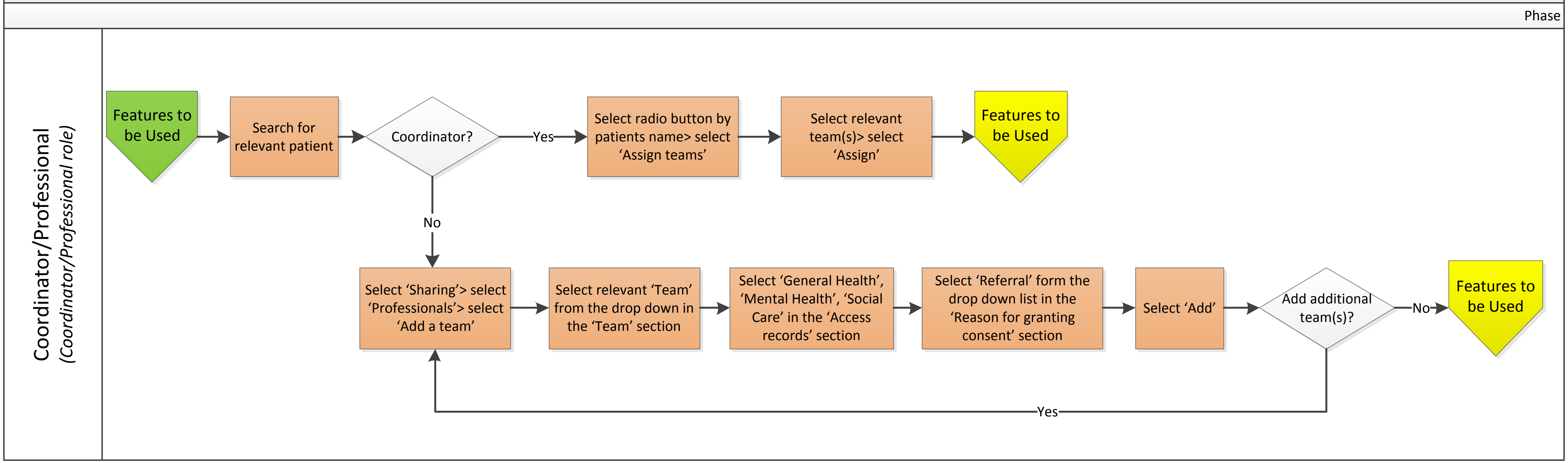


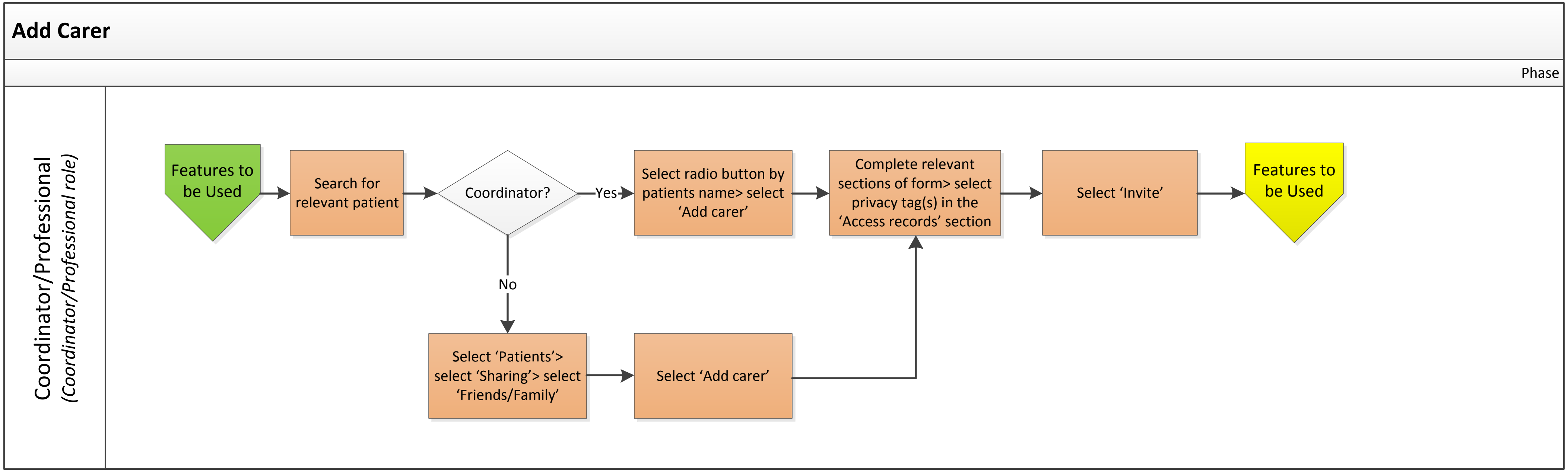
Demographic Update - TIE
Phase
Professional/Coordinator
(Professional/Coordinator role)
Features to be Used
Demographic Update
Search for patient in local PAS System
Make relevant demographic updates in local PAS System
Trust Integration Engine
- receive A31 HL7 message from PAS
- format and send A31 HL7 message to CIE
CIE HL7 API
- receives A31 HL7 message and responds with HL7 acknowledgement
CIE
- patient demographic details updated on CIE
Features to be Used

## Password Reset

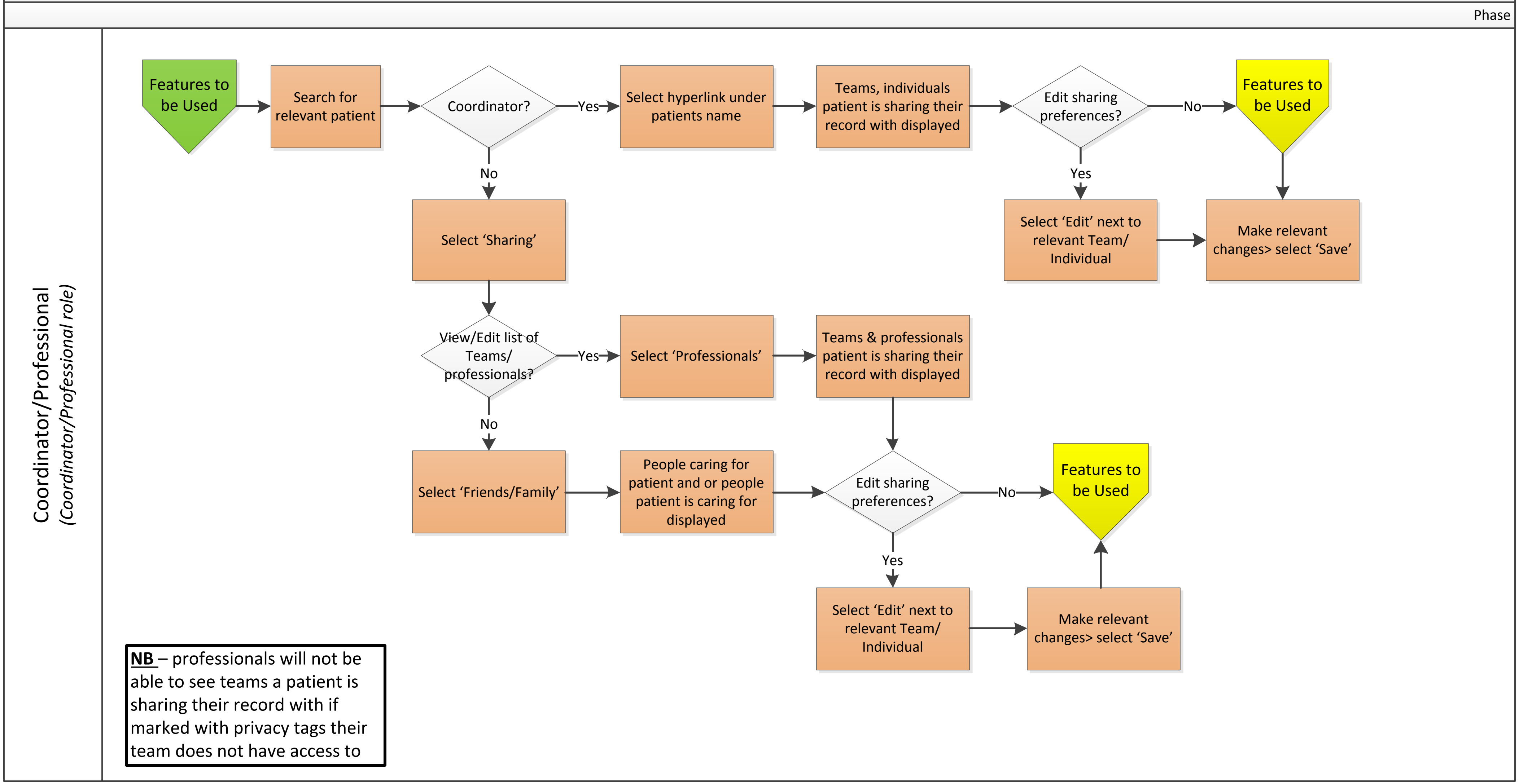


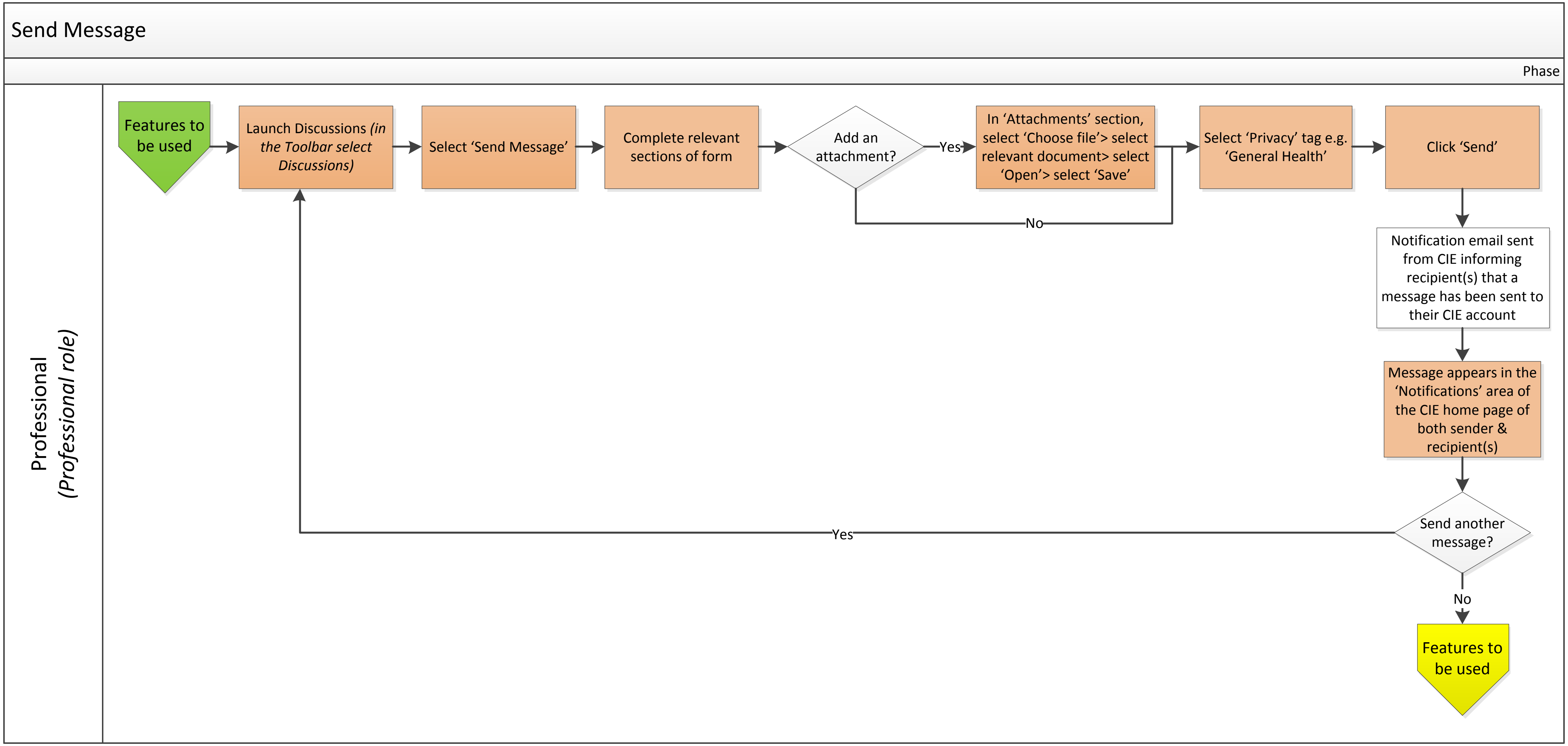
# Add Patient to Team



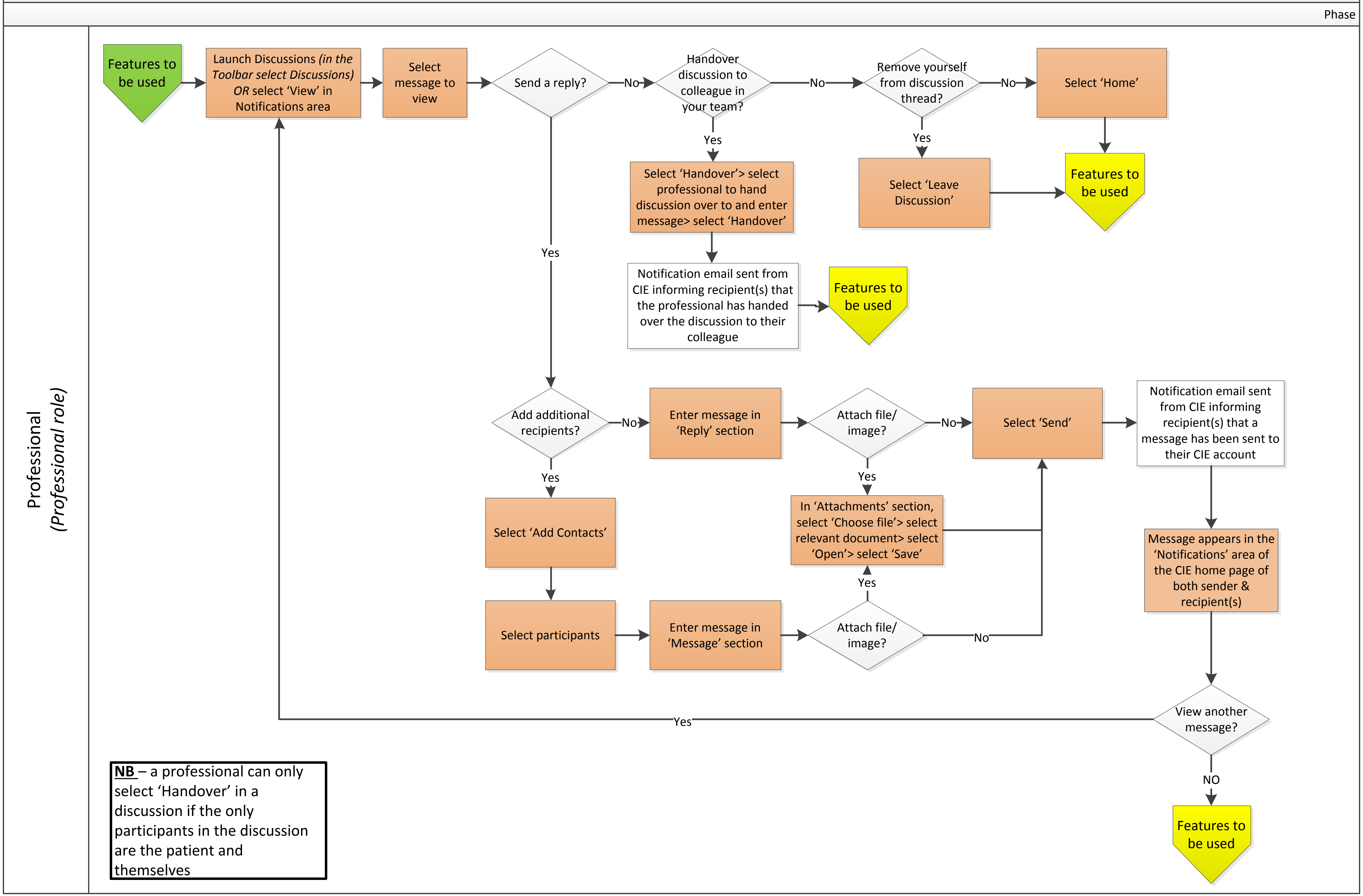

Add Carer
Phase
Coordinator/Professional
(Coordinator/Professional role)
Features to be Used
Search for relevant patient
Coordinator?
Yes
No
Select radio button by patients name> select 'Add carer'
Complete relevant sections of form> select privacy tag(s) in the 'Access records' section
Select 'Invite'
Features to be Used
Select 'Patients'> select 'Sharing'> select 'Friends/Family'
Select 'Add carer'

# View/Edit Sharing Preferences

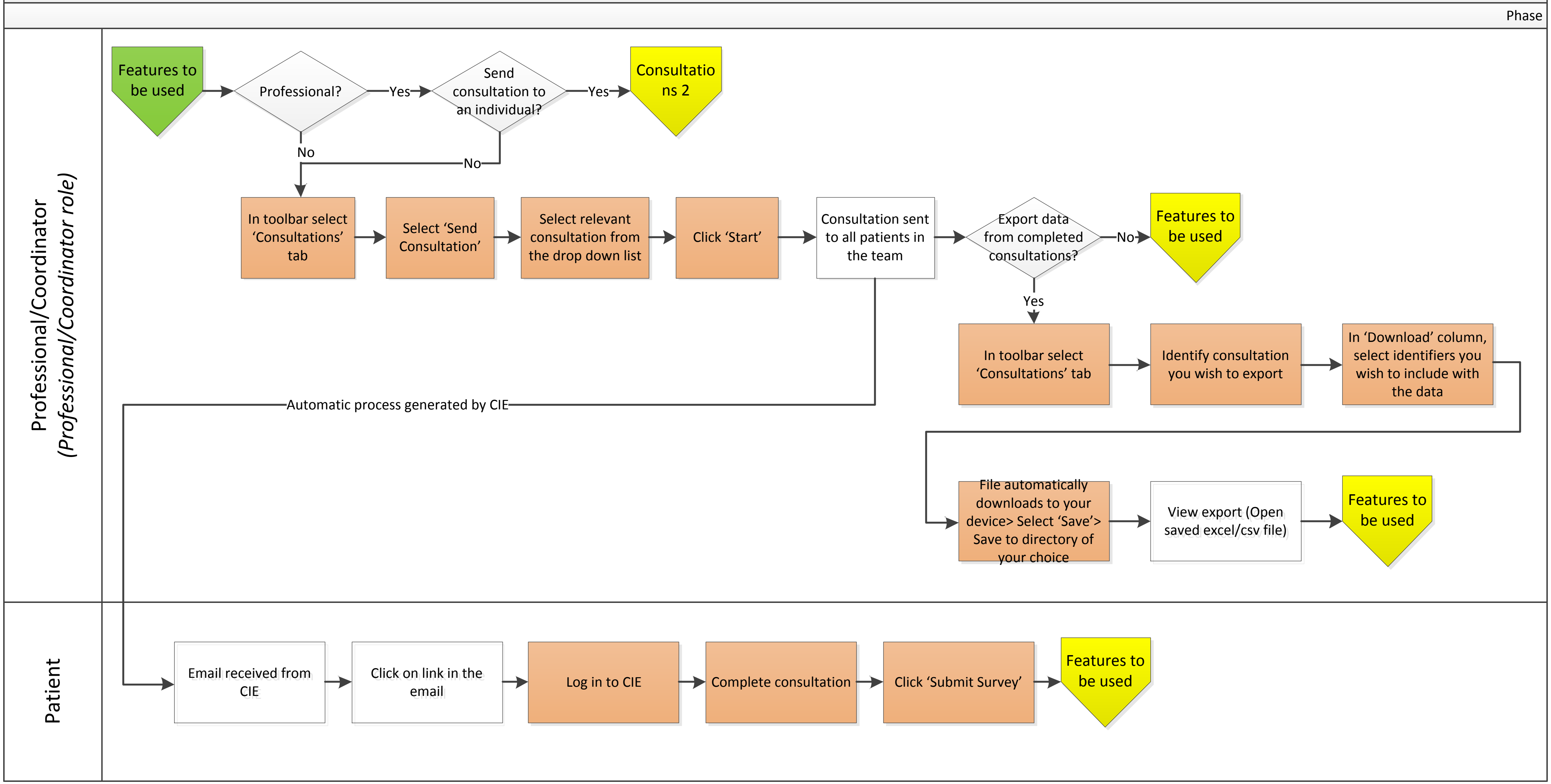



Send Message
Phase
Professional
(Professional role)
Features to be used
Launch Discussions (in the Toolbar select Discussions)
Select 'Send Message'
Complete relevant sections of form
Add an attachment?
Yes
In 'Attachments' section, select 'Choose file'> select relevant document> select 'Open'> select 'Save'
No
Select 'Privacy' tag e.g. 'General Health'
Click 'Send'
Notification email sent from CIE informing recipient(s) that a message has been sent to their CIE account
Message appears in the 'Notifications' area of the CIE home page of both sender & recipient(s)
Send another message?
Yes
No
Features to be used

# View Message

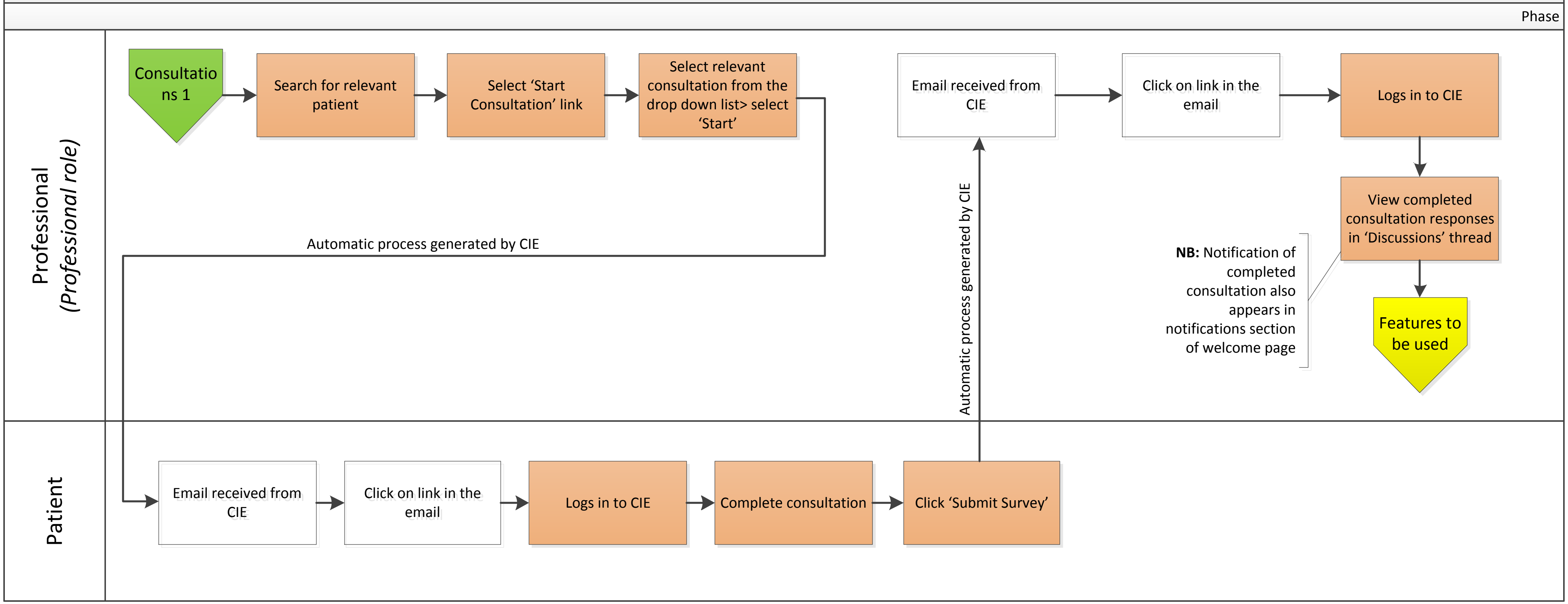


## Consultations (Part 1)

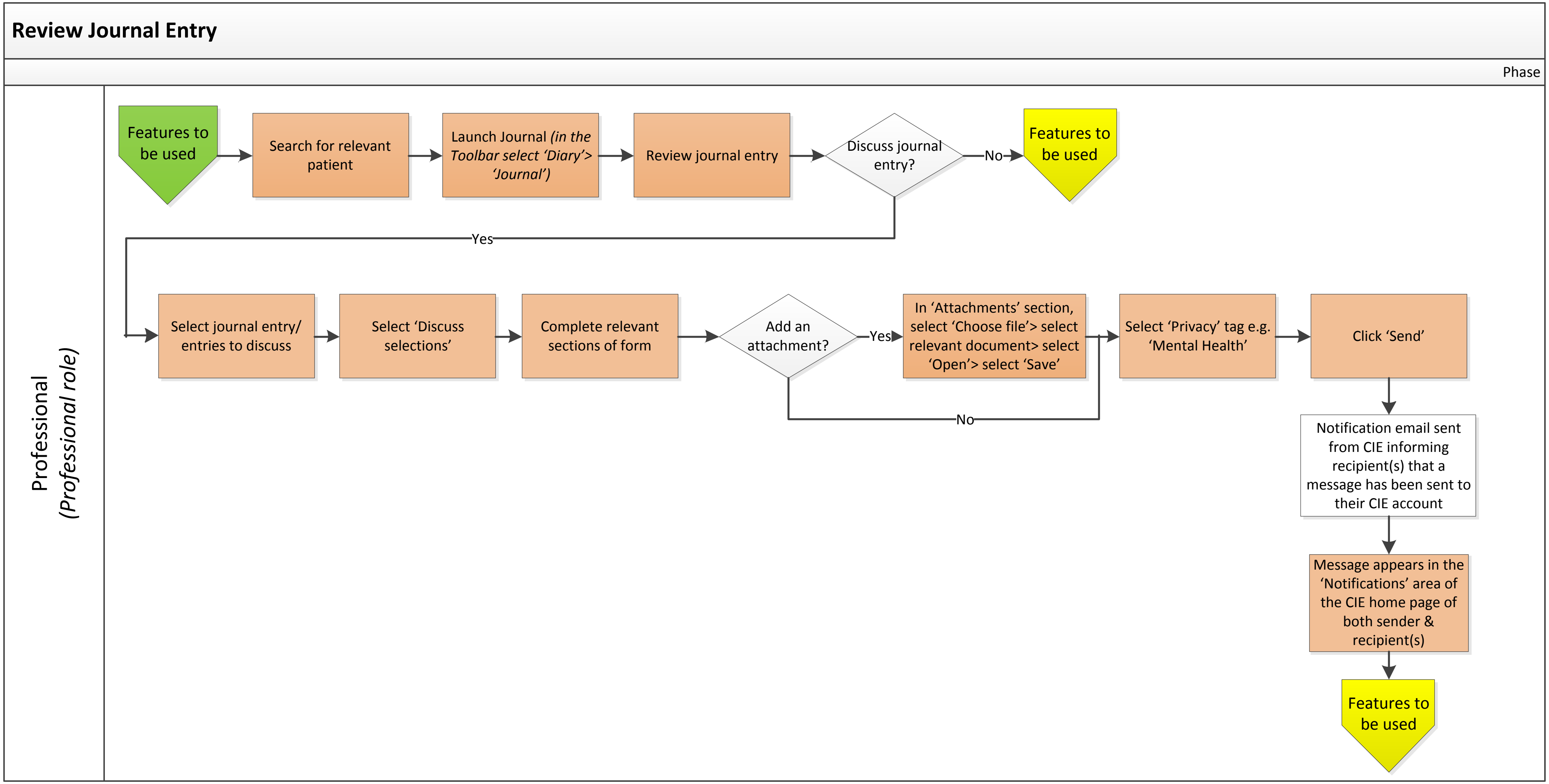


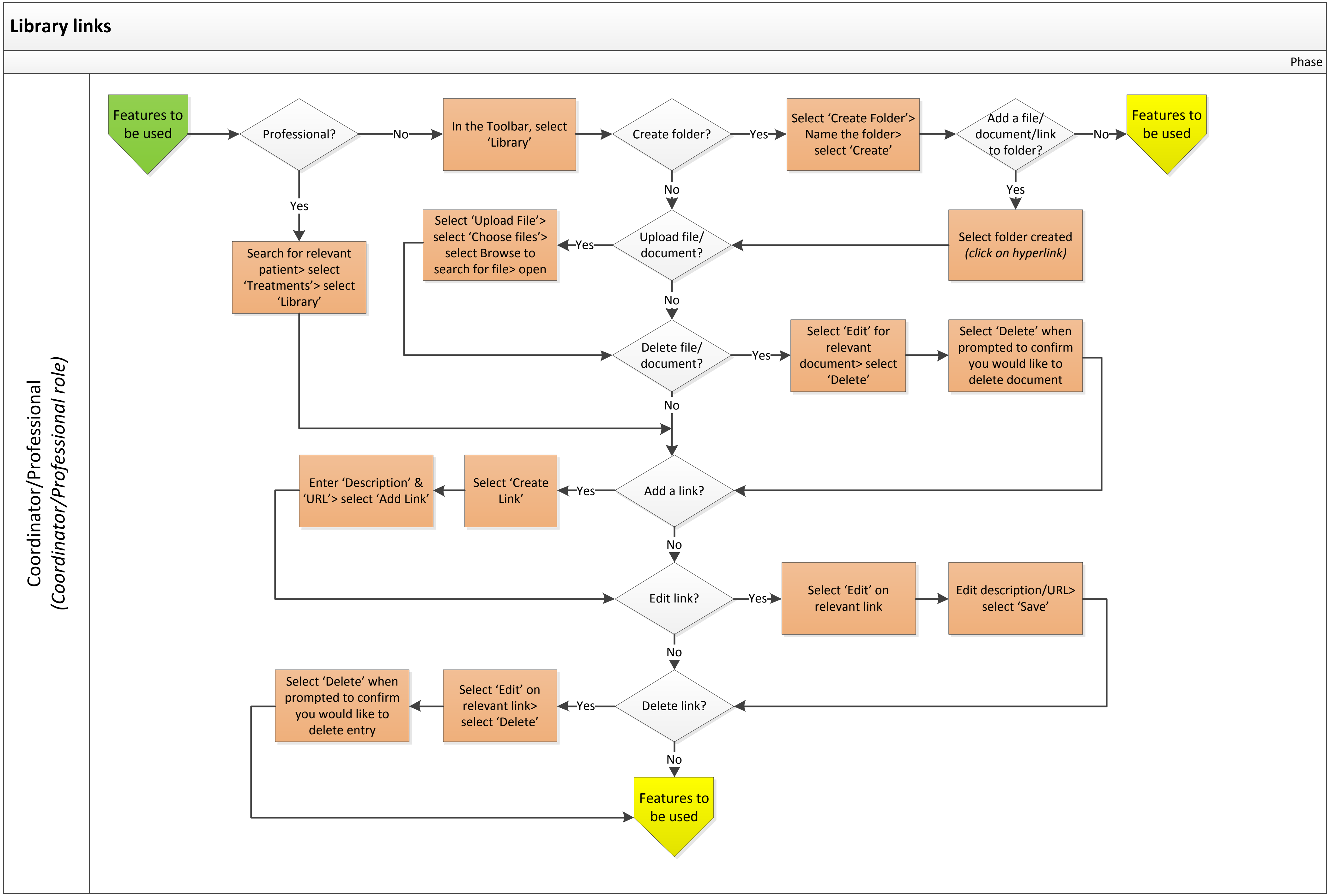

**NB** – (i) Professionals can either send consultations to ALL patients in their team or to an individual patient; (ii) Coordinators can only send consultations to ALL patients in their team; (iii) Patients are not able to see consultations on their 'Discussions' page once a consultation sent by mass consultation has been completed

# Consultations (Part 2)

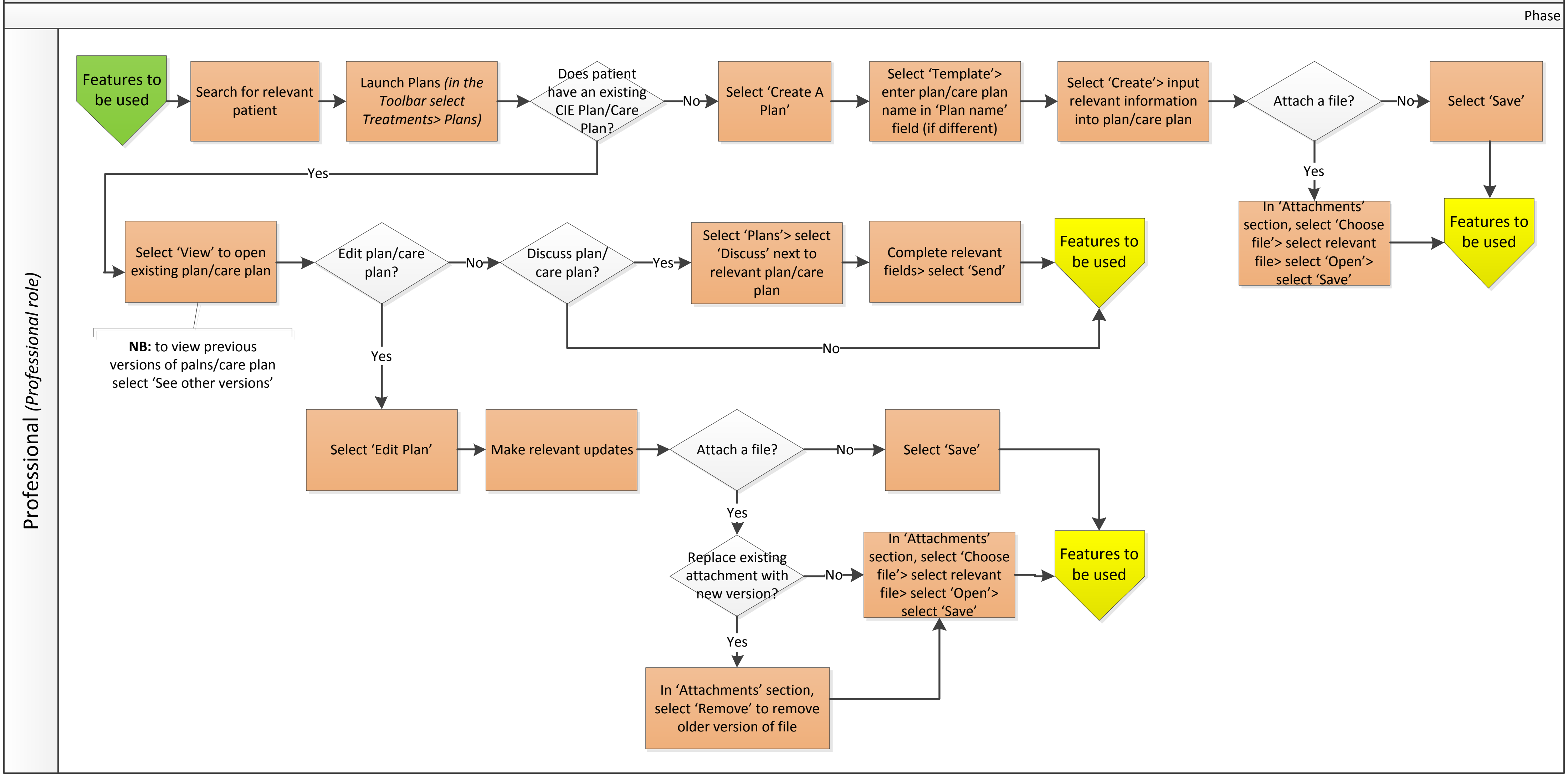



**NB** – Patients are able to see completed consultations on their 'Discussions' page (viewable if a consultation has been sent to them individually by a professional)

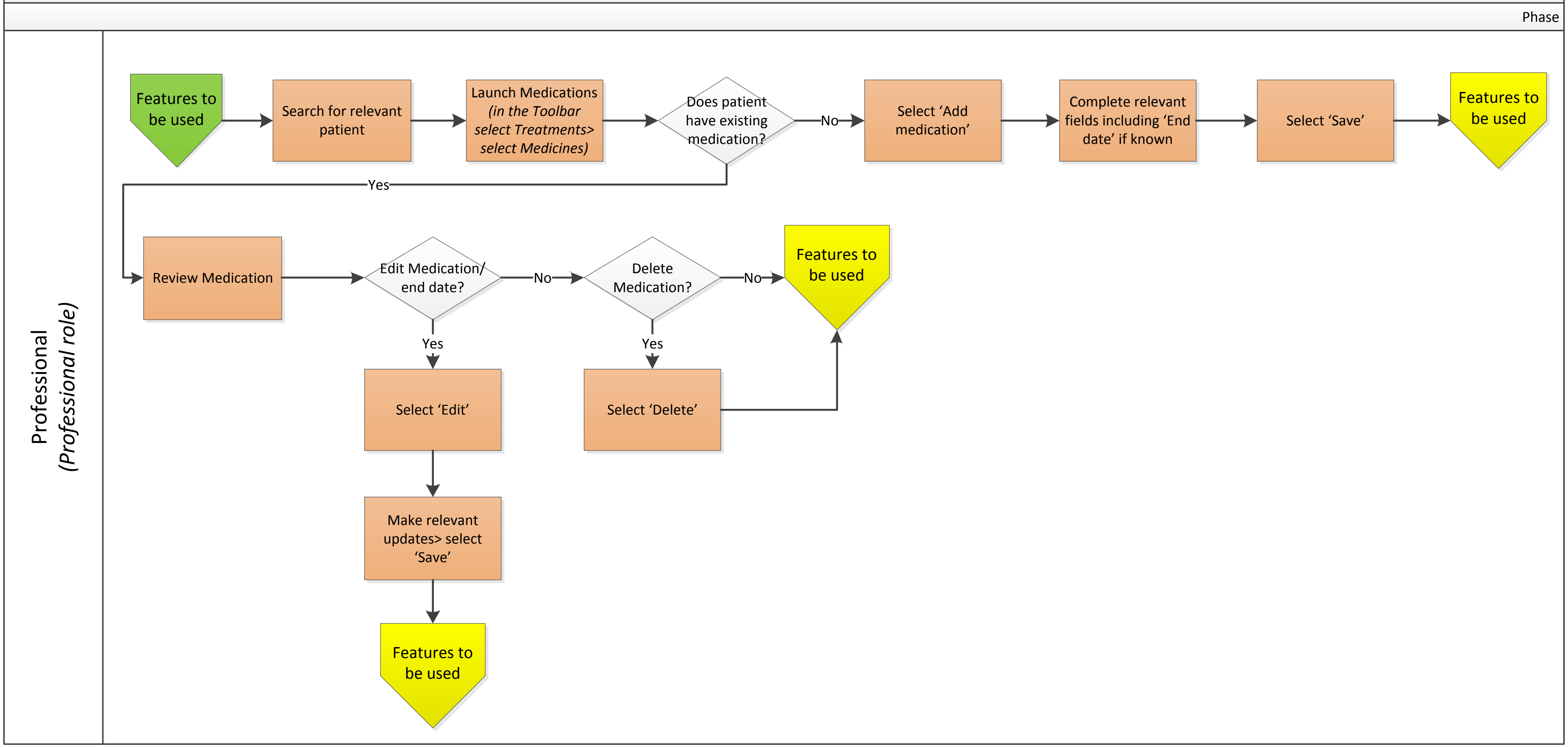

Review Journal Entry
Phase
Professional
(Professional role)
Features to be used
Search for relevant patient
Launch Journal (in the Toolbar select 'Diary'> 'Journal')
Review journal entry
Discuss journal entry?
No
Features to be used
Yes
Select journal entry/ entries to discuss
Select 'Discuss selections'
Complete relevant sections of form
Add an attachment?
Yes
In 'Attachments' section, select 'Choose file'> select relevant document> select 'Open'> select 'Save'
No
Select 'Privacy' tag e.g. 'Mental Health'
Click 'Send'
Notification email sent from CIE informing recipient(s) that a message has been sent to their CIE account
Message appears in the 'Notifications' area of the CIE home page of both sender & recipient(s)
Features to be used


Library links
Phase
Coordinator/Professional
(Coordinator/Professional role)
Features to be used
Professional?
No
In the Toolbar, select 'Library'
Create folder?
Yes
Select 'Create Folder'> Name the folder> select 'Create'
Add a file/ document/link to folder?
No
Features to be used
Yes
Search for relevant patient> select 'Treatments'> select 'Library'
Select 'Upload File'> select 'Choose files'> select Browse to search for file> open
Upload file/ document?
Select folder created (click on hyperlink)
Delete file/ document?
Select 'Edit' for relevant document> select 'Delete'
Select 'Delete' when prompted to confirm you would like to delete document
Enter 'Description' & 'URL'> select 'Add Link'
Select 'Create Link'
Add a link?
Edit link?
Select 'Edit' on relevant link
Edit description/URL> select 'Save'
Select 'Delete' when prompted to confirm you would like to delete entry
Select 'Edit' on relevant link> select 'Delete'
Delete link?
Features to be used

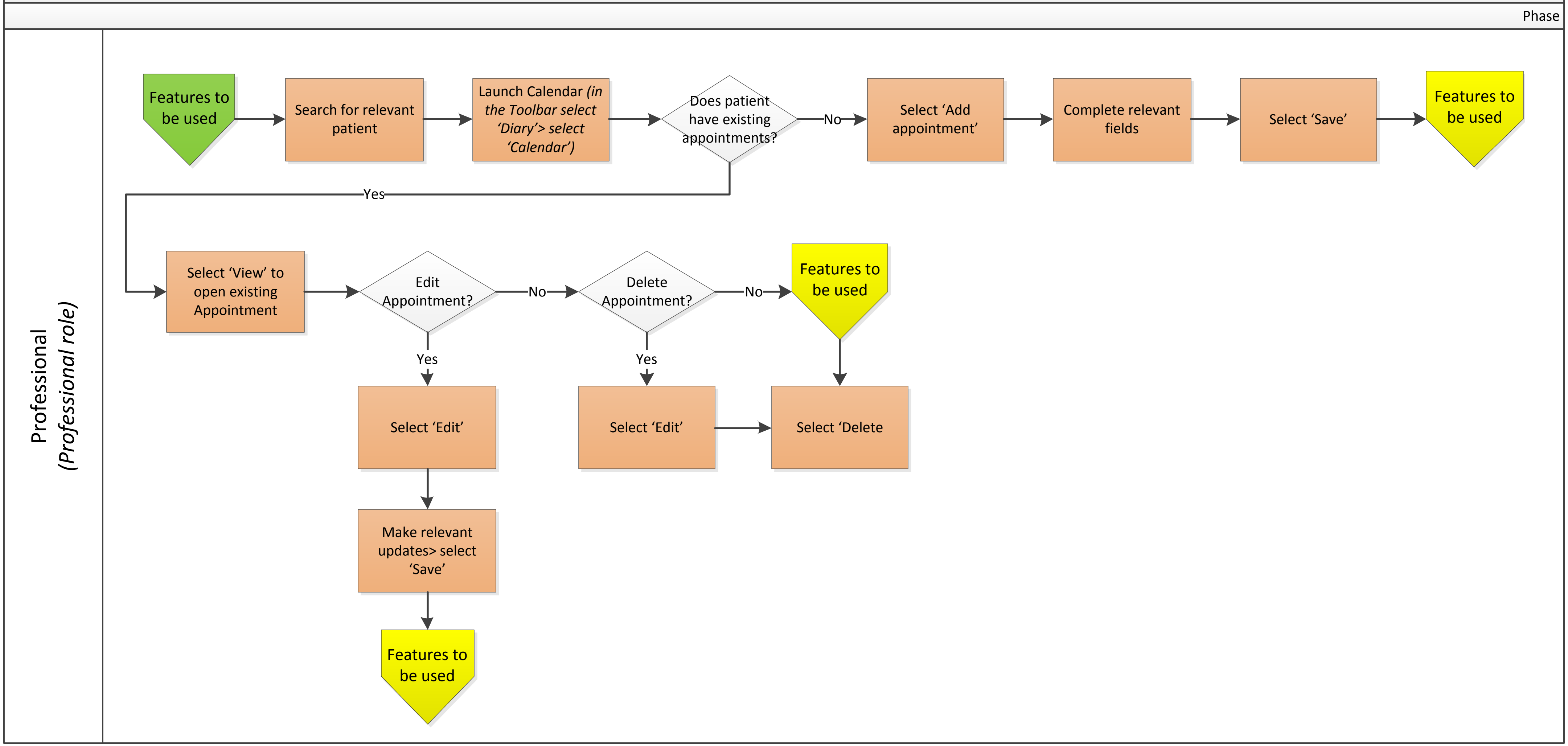
## Plan/Care Plan



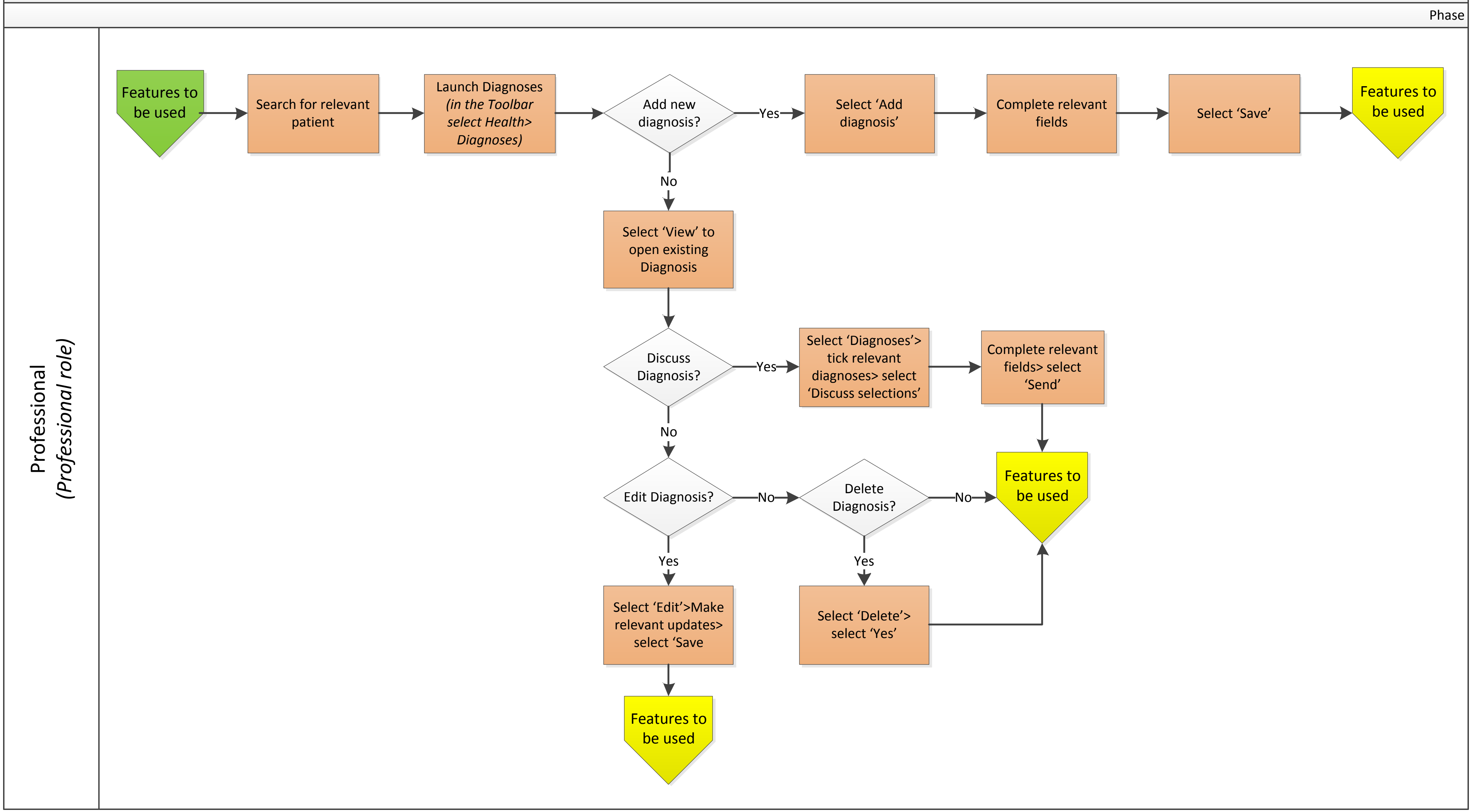
# Medications



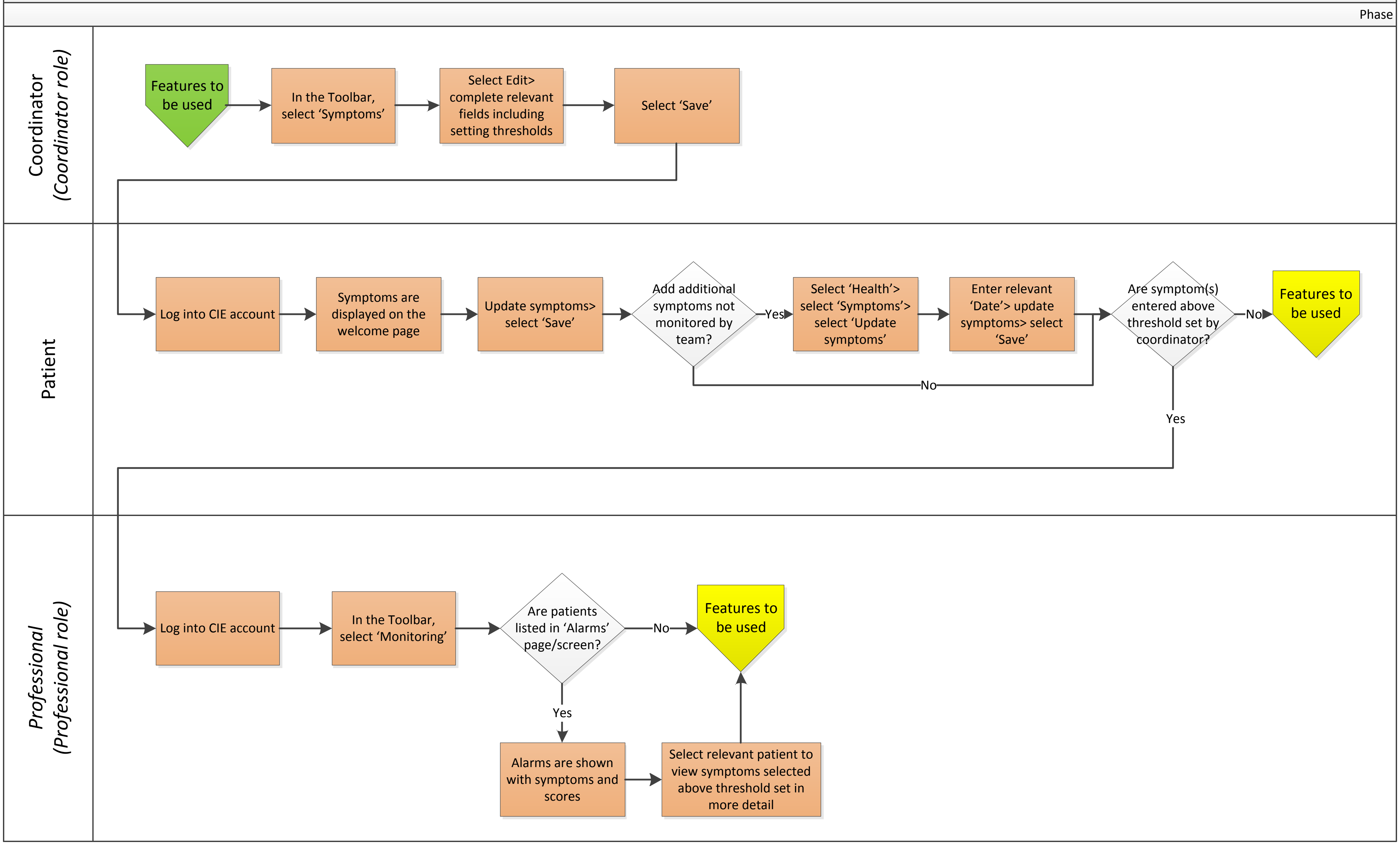
## Appointments



# Diagnoses

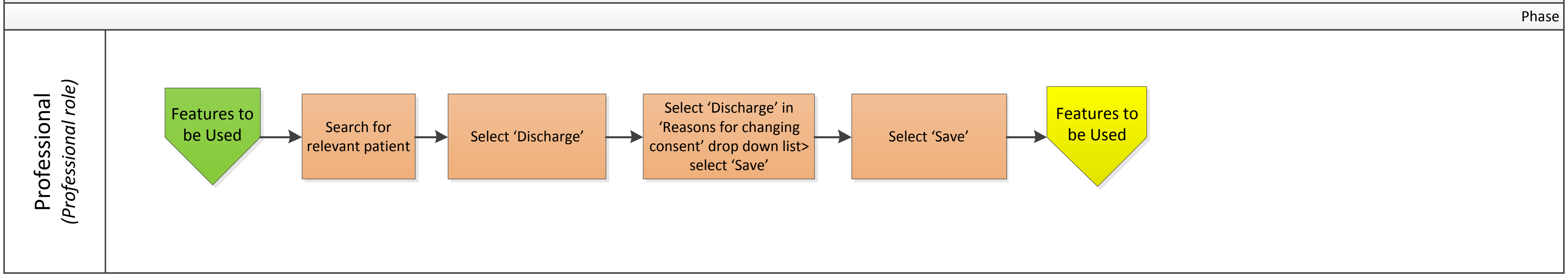

Phase
Professional
(Professional role)
Features to be used
Search for relevant patient
Launch Diagnoses (in the Toolbar select Health> Diagnoses)
Add new diagnosis?
Yes
Select 'Add diagnosis'
Complete relevant fields
Select 'Save'
Features to be used
No
Select 'View' to open existing Diagnosis
Discuss Diagnosis?
Yes
Select 'Diagnoses'> tick relevant diagnoses> select 'Discuss selections'
Complete relevant fields> select 'Send'
No
Features to be used
Edit Diagnosis?
No
Delete Diagnosis?
No
Yes
Yes
Select 'Edit'>Make relevant updates> select 'Save
Select 'Delete'> select 'Yes'
Features to be used

## Symptoms



Phase
Coordinator (Coordinator role)
Features to be used
In the Toolbar, select 'Symptoms'
Select Edit> complete relevant fields including setting thresholds
Select 'Save'
Patient
Log into CIE account
Symptoms are displayed on the welcome page
Update symptoms> select 'Save'
Add additional symptoms not monitored by team?
Yes
No
Select 'Health'> select 'Symptoms'> select 'Update symptoms'
Enter relevant 'Date'> update symptoms> select 'Save'
Are symptom(s) entered above threshold set by coordinator?
No
Yes
Features to be used
Professional (Professional role)
Log into CIE account
In the Toolbar, select 'Monitoring'
Are patients listed in 'Alarms' page/screen?
No
Yes
Features to be used
Alarms are shown with symptoms and scores
Select relevant patient to view symptoms selected above threshold set in more detail

## Patient Discharge



# Legend

**Phase 2 – Future State**