**Quick Reference Guide**

This guide is aimed to help administrators use the Care Information Exchange (CIE). You will need to have a **coordinator role** CIE account to do this. To access CIE, go to <https://my.patientsknowbest.com/?team=cie>, and log in to your account.

**Activating your CIE account**

1. You will receive an email from CIE/PKB asking you to register to CIE.

**NB -** check your Spam/Junk E-mail folder if the email does not appear in your Inbox

1. When you register it will ask you for your address and telephone number, please enter your work address and telephone number.
2. **Please note:** when registering, if you already have an existing CIE account, select **Already have an account Log in now**>log into your CIE account> select a team from the drop down list> complete relevant fields of form> select the new team from drop down list
3. End

**Adding the CIE Welcome Message**

1. Go to the CIE Resources page (<https://www.careinformationexchange-nwl.nhs.uk/resources>) and copy the text (incl. html tags) in the **CIE Patient Welcome Message** document
2. Log in to your CIE account
3. Select **Institution**> select **Greetings**
4. Paste the text copied from Step 1 into the **Welcome to Patient** field> select **Save**

**NB –** it has been agreed that all services/organisations must use the same welcome message which is available on the CIE Resources page

**Create Staff Account**

1. Log into CIE account for speciality team
2. Create an administrator (CIE coordinator role) account?

* Yes – go to Step 3
* No – go to Step 4

1. Select **Coordinators**> select **Add coordinator** button> complete relevant fields on **Invite coordinator** screen> select **Invite**> End
2. Create bulk professional accounts?

* Yes – refer to ‘Create Bulk Records/Accounts’ section
* No – go to Step 5

1. Select **Professionals**> select **Invite professional** button> complete relevant fields on the **Invite your professional** screen> select **Invite**
2. End

**Set Contact Preferences for Professionals**

1. Select **Professionals**> select **Contact preferences**
2. Tick checkbox in **Contactable** column(s) for relevant professional(s)> select **Save**
3. End

**Remind Staff Member to Activate Their CIE Account**

1. This is an optional process. You may want to send reminders to staff members who have not activated their CIE account.
2. Alternatively, you may be asked to this by members of staff who have accidentally deleted the registration email sent when their account was created.
3. Select **Professionals** or **Coordinators**> search for relevant staff member> select **Remind**
4. End

**Remove Staff Member from ‘Team’**

1. Does the staff member have a CIE professional account?

* Yes – go to Step 2
* No – go to Step 3

1. Select **Professionals**> select **Deactivate** for relevant professional> confirm deactivation when prompted> Go to Step 4
2. Select **Coordinators**> select **Deactivate** for relevant coordinator> confirm deactivation when prompted. Go to Step 4
3. If **Deactivate** does not appear next to a staff members name, email PKB HelpDesk ([help@patientsknowbest.com](mailto:help@patientsknowbest.com)). In the email message, ask them to remove the coordinator/professional from the team. Include the (i) name, (ii) email address of coordinator, and (iii) name of ‘Team’ (e.g. Imperial College Healthcare Trust – Clinical Health Psychology)
4. Has the staff member left the Trust/Organisation?

* Yes – go to Step 6
* No – End

1. Repeat Steps 1 – 3 for each speciality team the staff member has a CIE account for
2. End

**Advice Material/Library Section**

1. Select **Library**
2. Create a folder?

* Yes – go to Step 3
* No – go to Step 8

1. Select **Create Folder**> enter name of folder in **Create Folder** screen> select **Create**
2. Create a useful link within a folder?

* Yes – select hyperlink on relevant folder> go to Step 9
* No – go to Step 5

1. Upload a document within a folder?

* Yes – Select hyperlink on relevant folder> go to Step 13
* No – go to Step 6

1. Delete folder?

* Yes – go to Step 7
* No – End

1. Select **Edit** next to folder to be deleted> select **Delete**> select **Delete** when prompted
2. Create a useful link?

* Yes – go to Step 9
* No – go to Step 10

1. Select **Create Link**> enter **Description** and **URL** in **Create Link** screen> Select **Add link**
2. Edit link?

* Yes – go to Step 11
* No – go to Step 12

1. Select **Edit** on relevant link> edit **Description** and or **URL**> select **Save**
2. Upload a document?

* Yes – go to Step 13
* No – End

1. Select **Upload File**> Select **Choose files**> search for relevant file> select **Open**> select **Upload**
2. End

**Privacy/Consent Tags**

1. Patients can control the type of information people they are sharing their record with can see
2. The four privacy/consent tags associated with a patient’s record are:

* General Health
* Social Care
* Mental Health
* Sexual Health

**Verifying Patient Identity**

1. The identity of a patient needs to be verified before they can be given access to their CIE record
2. The following are acceptable forms of ID:

* Passport
* Photo ID driving licence
* Other form of photo ID with (i) appointment/clinic letter, (ii) appointment text reminder or (iii) utility bill

**Open/Create Patient Records**

1. Select **Patients**> enter patient’s name and or date of birth in the relevant fields> select **Go**
2. Patient found?

* Yes – go to Step 3
* No – go to Step 9

1. Does patient’s record include an email address?

* Yes – go to Step 5
* No – go to Step 4

**NB** – **Patient has no email** appears in the email column for relevant patient if patient’s record does not include an email address.

1. Select **Edit**> select **Add email**> enter patient’s email address on **Add email** page> select **Save contact**
2. Select patient’s name (hyperlink)
3. Patient sharing relevant consent/privacy tag(s) with your Team?

* Yes – End
* No – go to Step 7

1. Select **Edit**> select relevant consent/privacy tag(s) e.g. ‘General Health’ in **Record types** field> select a reason in the drop down list in the **Reason for changing consent** field> select **Save**> End
2. Create bulk patient records?

* Yes – refer to ‘Create Bulk Records/Accounts’ section
* No – go to Step 9

1. Does your organisation have an interface with CIE (e.g. pathology results, appointments etc. directly feed into CIE)?

* Yes – make a demographic update in your local PAS system> go to Step 1
* No – go to Step 10

1. Select **Invite patient** button> complete mandatory fields including **NHS Number**, **Date of birth**, ‘**E-mail address**, **MRN**> select relevant consent/privacy tag(s) e.g. ‘Social Care’ in **Access records** section> select **Invite**
2. End

**Create Bulk Records/Accounts**

1. Create bulk patient records?

* Yes – go to Step 2
* No – go to Step 6

1. Use the **Add many patients.csv** template file and complete the details for each patient> save file as **.CSV**
2. Log in to your CIE account
3. Select **Patients**> select **Add many patients**
4. Select **Choose file** in **CSV file** section> upload csv file> select relevant consent/privacy tag(s) e.g. ‘Mental Health’ in **Access records** section> select **Register patients**> End
5. Use the **Add many professionals** file and complete the details for each professional

**NB –** enter work address in address column (optional)

1. Log in to your CIE account
2. Select **Professionals**> select **Add many professionals**
3. Select **Choose file** in **CSV file** section> upload csv file> select **Register professionals**
4. End

**Edit Patient Demographics**

1. Search for relevant patient (see ‘Open/Create Patient Records’ section)
2. To edit patient’s email address, refer to ‘Edit Patient’s Email Address’ section
3. To update patient’s demographics e.g. address, telephone number, select **Edit** next to relevant patient> make relevant updates> enter your password in the **Password** field> select **Save**

**NB -** if your organisation has an interface with CIE (e.g. pathology results, appointments etc. directly feed into CIE) edit patient demographics in your local PAS system

1. End

**Add Patient’s Email Address**

1. Search for relevant patient (refer to ‘Open/Create Patient Records’ section)
2. **Patient has no email** appears in the email column for relevant patient if patient’s record does not include an email address.
3. Select **Edit**> select **Add email**> enter patient’s email address on **Add email** page> select **Save contact**> select **Back to my account**
4. End

**Edit Patient’s Email Address**

1. Search for relevant patient (refer to ‘Open/Create Patient Records’ section)
2. **Patient has no email** appears in the email column for relevant patient if patient’s record does not include an email address
3. Has patient activated (completed registration process) their CIE account?

* Yes – go to Step 5
* No – go to Step 4

**NB** – **change** appears next to the email address in the **E-mail** column if a patient has not activated their CIE account

1. Select **change** next to the email address in the **E-mail** column> enter new/correct email address in the **New Contact** field> select **Save**> End
2. Select **Edit** next to relevant patient> select **Add email**> enter patient’s email address on **Add email** page> select **Save contact**
3. Remind the patient to: click on the email received> change the radio button in **Email** section of their CIE record to **Main**> enter their password> select **Save**
4. **Please note** - Patients can update their email address themselves if they have activated their CIE account
5. End

**Remind Patient to Activate Their CIE Account**

1. This is an optional process. You may want to send reminders to patients who have not activated their CIE account.
2. Search for relevant patient (see ‘Open/Create Patient Records’ section)> select **Remind**
3. End

**Reset Passwords**

1. Request made by patient/carer?

* Yes – go to Step 2
* No – go to Step 6

1. Confirm users ID (refer to ‘Verifying Patient Identity’ section for acceptable forms of ID)
2. Search for relevant patient (see ‘Open/Create Patient Records’ section)
3. Select radio button next to patient’s name> select **Reset password**
4. Complete relevant sections of password reset form. **Name of requestor** = name of patient or carer (i.e. person making the request)> select **Start password reset**> End
5. Request made by coordinator (administrator)?

* Yes – go to Step 7
* No – go to Step 9

1. Select **Coordinators**> select **Reset password** next to relevant staff members name
2. Complete relevant sections of password reset form. **Name of requestor** = name of staff member making the request> select **Start password reset**> End
3. Select **Professionals**> select **Reset password** next to relevant staff members name
4. Complete relevant sections of password reset form. **Name of requestor** = name of staff member making the request> select **Start password reset**
5. End

**Add Patient to ‘Team(s)’**

1. Search for relevant patient (see ‘Open/Create Patient Records’ section)
2. Select radio button next to patient’s name> select **Assign Teams**> select checkbox next to team you would like to link patient to> select **Assign**
3. An invitation email is sent to the administrator(s) of the speciality team(s) you have added the patient to
4. End

**Add Carers/Professionals to Patient’s Record**

1. Search for relevant patient (see ‘Open/Create Patient Records’ section)
2. Select radio button next to patient’s name
3. Add a carer/family to patient’s record?

* Yes – go to Step 4
* No – go to Step 5

1. Select **Add carer**> complete relevant sections of form> select **Invite**> an invitation email is sent to the carer’s email address> End
2. Select **Add professional**> complete relevant sections of form> select **Invite**> an invitation email is sent to the professional’s email address

**NB –** if a patient is part of your team, health/care professionals in your team will have access to the patient’s record

1. End

**View/Edit Sharing Preferences for Patient**

1. Search for relevant patient (refer to ‘Open/Create Patient Records’ guide)
2. Select hyperlink on patient’s name
3. Teams, Professionals and other people patient is sharing their record with are displayed
4. **Please note:** you will not be able to see teams/professionals a patient is sharing their record with if marked with privacy tags your team does not have access to
5. Edit sharing preferences?

* Yes – go to Step 6
* No – End

1. Select **Edit** for relevant team/individual> select a reason in the drop down list in the **Reason for changing consent** field> select relevant consent/privacy tag(s) e.g. ‘General Health’ in **Record types** field> select **Save**
2. End

**Send Consultations (Questionnaires) to ALL Patients**

1. Select **Consultations**>select **Send consultation**> select relevant consultation (questionnaire) from the dropdown list> select **Start**
2. Consultations (questionnaires) will be sent to all patients in your speciality team
3. **Please note:** that completed consultations (questionnaires) sent by administrators (CIE coordinator role) will not appear in patient CIE records. They will however appear in the csv export. If your speciality team would like completed consultations (questionnaires) to appear in patient CIE records please ask a health/care professional (CIE professional role) to send consultations (questionnaires) to patients.
4. End

**Export Data from Consultations (Questionnaires)**

You are able to export data from completed consultations (questionnaires) sent by your speciality team into a CSV file

1. Select **Consultations**> identify consultation to export> select identifier(s) to include with data in **Download** column
2. Using Google Chrome browser?

* Yes – go to Step 3
* No – go to Step 4

1. Export will be downloaded to the Downloads folder> open/save downloaded csv file> End
2. You will be prompted to either open or save the csv file. To save the document, select **Save** option> rename file> select relevant directory/folder to save document in> select **Save**
3. End

**Symptoms**

1. Set up Symptom Tracker?

* Yes – go to Step 2
* No – go to Step 4

1. Select **Symptoms**> select **Edit**> select symptoms to be monitored in the **Monitor?** field> enter the weighting for the symptom and order it should appear on the list in the **Weighting** and **Order** fields
2. In the **Alarm** section, enter the relevant thresholds, number of days to track the symptoms> select **Save**

**NB** – Red threshold must be higher than value set in Amber

1. Edit Symptom tracker?

* Yes – go to Step 5
* No – go to Step 6

1. Repeat steps 2-3, deselect/select relevant symptoms
2. Stop monitoring symptoms?

* Yes – go to Step 6
* No - End

1. Select **Symptoms**> select **Stop tracking**
2. End

**Plans/Care Plans**

1. Contact PKB Customer Success Team Manager to create/edit **Personal health plan templates**

**Other CIE Features**

1. Select the **Help** icon to access **Help** pages
2. Refer to **CIE Patient Leaflet** document for patient FAQs, and other features patient may wish to use
3. Link to the CIE website is: <https://www.careinformationexchange-nwl.nhs.uk/>