**Quick Reference Guide**

This guide is aimed to help health/care professionals use the Care Information Exchange (CIE). You will need to have a **professional 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

**Set Out of Office Days & Contact Preferences**

1. To set out of office days: select **Schedule**> select **Schedule**> select days out of office> select **Save schedule**
2. To set your contact preferences, contact your team coordinator (admin) or IT department *(if applicable)* and inform them of your preferences for being contactable by messages and consultations
3. 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

**Patient Sign-Up**

1. ONLY patients with NHS Numbers should be enrolled onto CIE
2. Enter patient’s NHS number in the **ID section**> select **NHS Number** from the dropdown list in the **ID section**
3. Select **Organisational level list** in the **From** field
4. Select **Go**
5. Patient found?

* Yes – go to Step 8
* No – go to Step 6

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 2
* No – go to Step 7

1. Select **Add patient** button> complete mandatory fields including **NHS Number**, **Date of birth**, **MRN** and **E-mail address** (if patient has an email address)> select relevant consent/privacy tag(s) patient has agreed to share e.g. Mental Health, General Health in **Access records** section> select **Invite patient**> End
2. **Add to my team** appears under patient’s name?

* Yes – go to Step 9
* No – select hyperlink on patient’s name> Go to Step 11

**NB** – if patient is already sharing their record with your speciality team **Add to my team** does NOT appear below their name

1. Select **Add to my team**
2. Complete permission screens> select level of access (e.g. ‘General Health’) patient has agreed to share> select **Next**
3. Patient **Summary** page displayed
4. Does patient’s record include an email address?

* Yes – go to Step 13
* No – go to Step 14

1. Is patient’s email address correct?

* Yes – End
* No – refer to ‘Edit Patient’s Email Address’ section

1. Does patient have an email address?

* Yes – go to Step 15
* No – go to Step 17

1. Select **Edit** at the top of page underneath address field
2. Select **Add email**> enter patient’s email address> select **Save contact**> End
3. Would patient like to have their carer (friend/family) access their record on their behalf?

* Yes – go to Step 18
* No – inform patient that they will not be able to access their CIE record without an email address> End

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

**Open Patient Record**

1. Enter patient’s NHS number/MRN and or name and date of birth in relevant field(s)

**NB -** to search for a patient by: (i) MRN, select **Org Level ID** from the dropdown list in the **ID section**, (ii) NHS number, select **NHS Number** from the dropdown list in the **ID section**

1. Select **My List** in the **From** field
2. Select **Go**
3. Patient found?

* Yes – go to Step 5
* No – refer to ‘Patient Sign-up’ guide

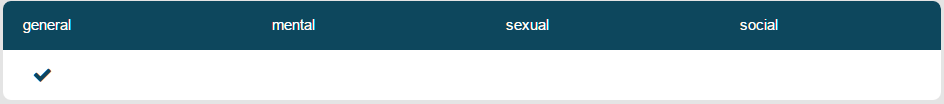
1. **Add to my team** appears under patient’s name?

* Yes - refer to ‘Patient Sign-up’ guide
* No – go to Step 6

**NB** – if patient is already sharing their record with your speciality team **Add to my team** does NOT appear below their name

1. Select hyperlink on patient’s name
2. Patient **Summary** page displayed
3. Patients can control the type of information people they are sharing their record with can see
4. The four consent tags/privacy associated with a patient’s record are:

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

1. Tick(s) indicates consent/privacy tags for patient record 
2. End

**Edit Patient Demographics**

1. To edit patient’s email address, see ‘Add or Edit Patient’s Email Address’ section
2. Does your organisation have an interface with CIE (e.g. pathology results, appointments etc. directly feed into CIE)?

* Yes – edit patient demographics in your local PAS system> End
* No – go to Step 3

1. Search for relevant patient (refer ‘Open Patient Record’ section)
2. Select **Edit** at the top of page underneath address field> make relevant updates (e.g. update address, MRN, telephone number etc.)> enter your password in the **Password** field> select **Save**
3. End

**Add or Edit Patient’s Email Address**

1. Search for relevant patient (see ‘Open Patient Record’ section)
2. Add an email address to patient’s record (record does not contain an email address)?

* Yes – Go to Step 3
* No – Go to Step 6

1. Select **Edit** at the top of page underneath address field> select **Add email**> enter patient’s email address on **Add email** page> select **Save contact**
2. An email will be sent to the patient’s email address
3. Remind the patient to: click on the email received and follow relevant instructions> End
4. Select **Edit** at the top of page underneath address field> select **Add email**> enter patient’s email address on **Add email** page> select **Save contact**
5. An email will be sent to the patient’s email address
6. 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**
7. **Please note**: patients are able to edit their email address themselves. If a patient would like to edit their email address themselves: ask them to log into their CIE account> select **Settings** at the top of page> select **Add email**> enter new email address on **Add email** page> select **Save contact**> an email is sent to the patient’s email address. 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**
8. End

**Reset Patient’s Password**

1. Enter patient’s NHS number/MRN and or name and date of birth in relevant field(s)

**NB -** to search for a patient by: (i) MRN, select **Org Level ID** from the dropdown list in the **ID section**, (ii) NHS number, select **NHS Number** from the dropdown list in the **ID section**

1. Select **My List** in the **From** field
2. Select **Go**
3. Patient found?

* Yes – go to Step 5
* No – refer to ‘Patient Sign-up’ guide> go to Step 1

1. Select **Password reset**
2. Complete relevant sections of password reset form. **Name of requestor** = name of patient or carer (person making the request)> select **Start password reset**
3. An email will be sent to the patient informing them that their password has been reset
4. Remind the patient to: click on the email received and reset their password
5. End

**Send Messages**

1. Search for relevant patient (see ‘Open Patient Record’ section)
2. Select **Discussions**> Select **Send message**> complete relevant sections of form
3. Add an attachment?

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

1. Select **Choose file** in **Attachments** section> select file to attach> select **Open**
2. Select privacy tag e.g. ‘Social care’> select **Send**
3. End

**View Messages, Inpatient Admissions, Discharges, Transfers & ED Attendance Info**

1. Search for relevant patient (see ‘Open Patient Record’ section)
2. Select **Discussions**
3. Un-read messages have a white background
4. Read messages have a gray background
5. The number to the right of a message indicates the number of threads/responses for that message
6. Select relevant message/activitytoview
7. Send a reply?

* Yes – go to Step 8
* No – 14

1. Add additional contacts?

* Yes – go to Step 9
* No – enter message in **Reply** section> go to Step 10

1. Select **Add contacts**> select **Participants**
2. Enter message in the **Message** section
3. Add an attachment?

* Yes – go to step 12
* No – go to step 13

1. Select **Choose file** in **Attachments** section> select file to attach> select **Open**
2. Select **Send**> End
3. Handover discussion to a colleague in your speciality team?

* Yes – go to Step 15
* No – End

**NB** - you can only handover a discussion to a colleague if the only participants in the discussion are the patient and yourself

1. Select **Handover**> select professional to hand discussion over to> complete relevant sections of the form> select **Handover**
2. End

**Diagnoses**

1. Search for relevant patient (refer to ‘Open Patient Record’ section)
2. Select **Health**> select **Diagnoses**
3. Please note that if the text ‘No diagnoses’ is displayed, this does not necessarily mean that a patient does not have a diagnosis added to their medical record, it just means that diagnoses have not been added/recorded on a patient’s CIE record
4. **Source** provides information on the source of the diagnosis
5. An individual can only edit/delete diagnoses added by themselves
6. Add a diagnosis?

* Yes – go to Step 7
* No – go to Step 8

1. Select **Add diagnosis**> complete relevant sections of form> select **Save**
2. Edit a diagnosis?

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

1. Select **Edit** next to relevant diagnosis> make relevant changes> select **Save**
2. Delete a diagnosis?

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

1. Select **Delete** next to relevant diagnosis> select **Yes**  when prompted to confirm you would like to delete the entry
2. Discuss a diagnosis?

* Yes – go to Step 13
* No - End

1. Select tick box next to relevant diagnosis/diagnoses> select **Discuss selections**> complete relevant sections of form> select **Send**
2. End

**Allergies**

1. Search for relevant patient (see ‘Open/Create Patient Records’ section)
2. Select **Health**> select **Allergies**
3. Please note that if the text ‘No allergies’ is displayed, this does not necessarily mean that a patient does not have an allergy, it just means that allergies have not been added/recorded on a patient’s CIE record
4. **Source** provides information on the source of the allergy
5. An individual can only edit/delete allergies added by themselves
6. Add an allergy?

* Yes – go to Step 7
* No – go to Step 8

1. Select **Add allergy**> complete relevant sections of form> select **Add allergy**
2. Edit an allergy?

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

1. Select **Edit** next to relevant allergy> make relevant changes> select **Add allergy**
2. Delete an allergy?

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

1. Select **Delete** next to relevant allergy> select **Yes**  when prompted to confirm you would like to delete the entry
2. Delete an allergy?

* Yes – go to Step 13
* No – End

1. Select tick box next to relevant allergy/allergies> select **Discuss selections**> complete relevant sections of form> select **Send**
2. End

**Symptoms**

1. Is your speciality team monitoring patient symptoms?

* Yes – go to Step 2
* No – go to Step 5

1. Select **Monitoring**
2. Are patients listed on the **My alarms** screen?

* Yes – go to step 4
* No – go to step 6

1. Alarms are shown with symptoms and scores for patients whose symptoms are above the threshold set by the team.
2. Select relevant patient to view symptoms selected above set threshold in more detail
3. View (other) symptoms entered by patients?

* Yes – go to Step 7
* No - End

1. Search for relevant patient (see ‘Open Patient Record’ section)
2. Select **Health**> select **Symptoms**
3. End

**Pathology/Radiology Results**

1. Search for relevant patient (see ‘Open Patient Record’ section)
2. Select **Health**
3. View pathology results?

* Yes – go to Step 4
* No - go to Step 9

1. Select **Laboratory**> select relevant test result
2. **Source** provides information on the source of the pathology result
3. Select the **Help** icon  for more information on what the test is for (user is directed to ‘Lab Tests Online’)
4. To edit privacy/consent tag for a pathology result, select **Edit privacy**> select relevant privacy tag in **Privacy** section> select **Save**
5. To discuss a pathology result, select tick box next to relevant result(s)> select **Discuss selections**> complete relevant sections of form> select **Send**
6. Select **Imaging**> select **View** to view relevant radiology report
7. **Created** column provides information on the source of the radiology report
8. End

**Create a Plan/Care Plan**

1. Search for relevant patient (refer to ‘Open Patient Record’ section)
2. Select **Treatments**> select **Plans**> select **Create Plan**
3. Select relevant template from the dropdown list in the **Template** section> enter plan name in **Plan name** field (if different)> select **Create**
4. Complete relevant fields (incl. uploading attachments if required)> select relevant privacy/consent tag e.g. ‘Mental Health’> select **Save**
5. End

**View/Edit a Plan/Care Plan**

1. Search for relevant patient ‘Open Patient Record’ section)
2. Select **Treatments**> select **Plans**
3. To discuss a plan: select **Discuss** next to the relevant plan> complete relevant sections of form> select **Send**
4. To view an existing plan: locate relevant plan> click on hyperlink for relevant plan to view
5. To view other versions of the plan: locate relevant plan> click on hyperlink for relevant plan> select **See other versions**> select version of Plan/Care Plan to view (select relevant ‘Date’)
6. To edit/update a plan: locate relevant plan> click on hyperlink for relevant plan> select **Edit Plan**> update relevant fields> select **Save**
7. End

**Medication**

1. Search for relevant patient (see ‘Open Patient Record’ section)
2. Select **Treatments**> select **Medicines**
3. Please note that if the text ‘You have no medications’ or ‘You have no past medications’ are displayed in a patient’s record, this does not necessarily mean that a patient is not taking any prescribed medication, it just means that past/current medication have not been recorded on a patient’s CIE record
4. **Noted by** provides information on the source of the medication entry
5. An individual can only edit/delete medication added by themselves
6. To add medication: select **Add medication**> complete relevant sections of form> select **Save**
7. To edit medication: select **Edit** next to relevant medication> complete relevant sections of form> select **Save**
8. To delete medication: select **Delete**> select **Delete**  when prompted to confirm you would like to delete the entry
9. End

**Advice Material/Library section**

1. Search for relevant patient (see ‘Open Patient Record’ section)
2. Select **Treatments**> select **Library**> Resource library displayed
3. An individual can only delete/edit links added by themselves
4. Information added by patient/professional appear under *‘Patient X’s Library’*
5. Information added by various teams patient is sharing their record with appear under specific ‘Team’ name
6. To add a link: select **Create link** in patients library> enter **Description** and **URL** in the **Create link** screen>select **Add Link**
7. To edit a link: select **Edit** on relevant link> edit **Description** and or **URL**> select **Save**
8. To delete a link: select **Edit** on relevant link> select **Delete**> select **Delete** when prompted
9. End

**View Appointments**

1. Search for relevant patient (see ‘Open Patient Record’ section)
2. Select **Diary**> select **Calendar**
3. To edit privacy/consent tags, select **View** for relevant appointment> select **Edit**> select relevant privacy/consent tag in **Privacy** section> select **Save**
4. End

**Add Appointments**

1. Search for relevant patient (see ‘Open Patient Record’ section)
2. Select **Diary**> select **Calendar**
3. Select **Add appointment**> complete relevant fields> leave the **Type code** field blank> select relevant privacy tag e.g. ‘Sexual Health’> Select **Save**
4. **Please note:** if your organisation has an interface with CIE (e.g. pathology results, appointments etc. directly feed into CIE), appointments booked in your local PAS system will automatically flow into CIE. Check with your IT service to confirm the type of appointments this applies to.
5. End

**Journal Entries**

1. Search for relevant patient (see ‘Open Patient Record’ section)
2. Select **Diary**> **Journal**> journal entries (if any) are displayed
3. To discuss an entry: select the relevant journal entry/entries to discuss> select **Discuss selections**> complete relevant sections of form> select **Send**
4. End

**Send Consultations (Questionnaires) to an INDIVIDUAL Patient**

1. Search for relevant patient (see ‘Open/ Patient Record’ section)
2. Select **Discussions**> **Start consultation**> select relevant consultation (questionnaire) from the dropdown list> select **Start**
3. 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. End

**View Consultation (Questionnaire) Responses**

1. Consultations (questionnaires) sent to patients by health/care professionals can be found in the **Discussions** thread when completed
2. Was the consultation (questionnaire) sent by you?

* Yes – go to Step 3
* No – go to Step 6

1. You will receive an email notification from CIE/PKB when a patient has submitted the completed consultation (questionnaire)
2. Click on the link in the email received> log into your CIE account> view completed consultation (questionnaire) responses in the patient’s **Discussions** thread
3. View consultations (questionnaires) sent by other professionals (incl. members of your speciality team)?

* Yes – go to Step 6
* No - End

1. Search for relevant patient (refer to ‘Open Patient Record’ section)
2. Select **Discussions**>select hyperlink for relevant consultation response to view
3. 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

**Sharing Preferences**

1. Search for relevant patient (see ‘Open Patient Record’ section)
2. Select **Sharing**
3. Select **Professionals** to view Teams/professionals a patient is sharing their record with
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. Select **Friends/Family** to view friends, family and carers a patient is sharing their record with or people who have shared their record with the patient
6. Select **Pending** to view pending invitations
7. Edit sharing preferences?

* Yes – go to Step 7
* No – End

1. Edit sharing preferences for professionals/teams?

* Yes – go to Step 8
* No – go to Step 9

1. Select **Sharing**> select **Professionals**> select **Edit** next to relevant Team or Individual> complete relevant sections of form> select **Save**
2. Edit sharing preferences for carers?

* Yes – go to Step 10
* No - End

1. Select **Sharing**> select **Friends/Family**> select **Edit** next to carer> complete relevant sections of form> select **Save**
2. End

**Patient Discharge**

1. Search for relevant patient (see ‘Open Patient Record’ section)
2. Select **Discharge**> select **Save**
3. End

**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/>