Designing a workflow for registering patients for a My Health Record

Anne Kennedy, AAPM

Katrina Otto, Trainer & Practice Management Consultant

Vanessa Halter, Australian Digital Health Agency
Privacy, Compliance and Medico-Legal Risk Advisor

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Australian Digital Health Agency

My Health Record

www.digitalhealth.gov.au

Learning Objectives

1. Design a practice system for registering new and existing patients

2. Share success stories from other practices

3. Create a practice-specific dialogue for registering patients

4. Identify privacy and access restrictions for administration staff

5. Discuss policies, consent and standards appropriate to
   My Health Record

Poll Question:

Are you currently registering

patients for a My Health

Record?

Yes/No

Usage as at 4 August 2016

Over **2,200** new registrations per day

Over **20,000** shared health summaries uploaded in one week!

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My Health Record

Usage as at 7 August 2016

Consumer Registrations

4,029,386 Consumers registered

54% are female and 46% are male

Demographic Breakdown

35%	25%	26%	14%
Aged 20 or less	Aged 20-39	Aged 40-64	Aged 65 or higher

State	ACT	TAS	SA	NT	NSW	VIC	QLD	WA
% of population	20%	17%	15%	16%	16%	12%	22%	12%

Approximately 17% of Australia's population is registered for a My Health Record.

Websites for further learning:

www.myhealthrecord.gov.au
www.digitalhealth.gov.au

What we need:

1. **Gradual evolution towards critical mass.**

2. Embedded into routine clinical and administrative workflow.

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My Health Record

1. Design a practice system for registering new and existing patients

5 **Tips for success**

1. Train staff so they are prepared for conversations about
    My Health Record

2. Design a workflow that works for your practice eg. Who registers etc.

3. Write a dialogue with your staff so they know what to say to patients.

4. Educate patients via patient forms / TV screens / website.

5. Focused approach for patients at risk or with chronic conditions.

Poll Question:

What clinical software (CIS) do you use?

1. MedicalDirector
2. Best Practice
3. Genie
4. Communicare
5. Practix
6. MedTech
7. Profile/Intrahealth
8. Stat Health
9. CorePlus
10. MediRecords
11. Other
12. None

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My Health Record

Assisted Registration Guide

Download and read:

The Assisted Registration: A guide for Healthcare Provider

https://myhealthrecord.gov.au/internet/mhr/publishing.nsf/Content/6917FCF3053E237 2CA257F8A0008E39A/$File/Assisted%20Registration%20- %20A%20guide%20for%20Healthcare%20provider%20organisations.pdf

- An outline of the registration process
- Steps for getting ready
- More information on the registration process
- Audit and compliance

Pre-requisites to undertaking Assisted Registration

1. Be registered to participate in the My Health Record system;

2. Use clinical software which has Assisted Registration functionality, or install standalone Assisted Registration Tool;

3. Update the organisation's My Health Record system policy to cover Assisted Registration practices;

4. Have internet connectivity.

Update the organisation's My Health Record system policy to cover Assisted Registration practices

Participating healthcare organisations must have a My Health Record system policy that covers certain security practices of the organisation. More information available:
https://www.digitalhealth.gov.au/using-the-my-health-record-system/maintaining-digital-health-in-your-practice/privacy-and-security

This policy must be updated to cover:

1. How your organisation will authorise its employees to provide Assisted Registration

2. What training will be provided before an employee is authorised to provide Assisted Registration

3. How your organisation will confirm consent of an individual

4. How authorised employees will identify an individual for the purposes of Assisted Registration

Template My Health Record system policy:
http://www.nehta.gov.au/get-started-with-digital-health/registration/register-with-the-healthcare-identifiers-hi-service-and-the-my-health-record-system

Patient Eligibility
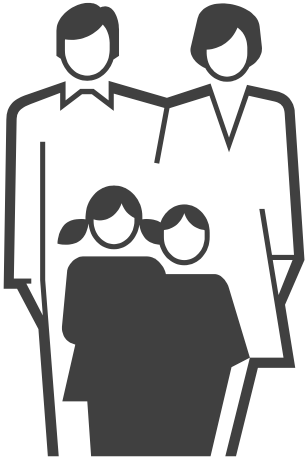
The individual is at least 14 years old and is applying to register themselves

The individual is applying to register a child (under 18 years) for whom the individual has parental responsibility

Adults without capacity must be registered via a different channel – i.e. in writing or in person at a Medicare Office

Steps to undertake Assisted Registration

Step 1: Provide individual with the [Essential Information](#)

Step 2: Obtain the consent of the individual

Step 3: Confirm the identity of the individual

Step 4: Submit the application to the System Operator

Step 5: Manage the IVC (if relevant)

Step 1: Provide individual with the Essential Information

https://myhealthrecord.gov.au/internet/mhr/publishing.nsf/Content/healthcare-providers/$file/Assisted-Registration-Essential-Information-and-privacy-collection-notice.pdf

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Department of Health

My Health Record

Essential information

A healthcare provider organisation can assist you to register for a My Health Record and must follow certain rules in doing so. This is called assisted registration. The person assisting you is not acting as an agent, or on behalf, of the My Health Record System Operator (the Secretary of the Department of Health).

Before you complete the assisted registration application form, please read the below information to find out how you can manage your My Health Record, and the Privacy Collection Notice to find out how we (the My Health Record System Operator) handle your personal information that we collect in the assisted registration process.

Managing your My Health Record

Once you have completed the assisted registration process and you have been registered for a My Health Record you will be able to decide who can access your personal information.

In rare cases, there may be information about your health that you don't want available on your My Health Record. If so, you can:

- ask your healthcare provider not to add it to your record, and they must comply with your request; or
- remove specific health information from your record.

If you limit access to your My Health Record or a document within it, emergency access rules permit registered healthcare provider organisations to get access for a limited time in a medical emergency.

You can also control who has access to your My Health Record by setting access controls, if you wish. You can set access controls for your My Health Record by:

- limiting access to the whole of the My Health Record; or
- limiting access to a specific document in a My Health Record.

If you do not set access controls, healthcare providers who treat you and who are registered with the My Health Record system will be able to view documents that have been uploaded by your other healthcare providers.

For more information on how you can manage your My Health Record, please visit www.myhealthrecord.gov.au.

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Step 2: Obtain the consent of the individual

#1: Consent to Register for the My Health Record

#2: Consent to healthcare providers uploading documents to their record

✓ Verbal consent (note this in your local records)

✓ Application form

- Do not send completed form to System Operator

- Securely destroy form when no longer needed

https://myhealthrecord.gov.au/internet/mhr/publishing.nsf/Content/provider-resources

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Australian Government
Department of Health

ASSISTED REGISTRATION
Application to Register for a My Health Record

Purpose of this form

This is an application for registration as a consumer under the *My Health Health Records Act 2012*. Registration for a My Health Record is voluntary.

If you would prefer, you can register free of charge online at www.myhealthrecord.gov.au, by phoning 1800 723 471, by mail using a different form, or in a Medicare shopfront.

Important: You need to read the essential information before you sign this application.

Application for yourself

Please provide the following information about **yourself**

1 Family name

First given name

2 Date of birth   /   /
3 Sex   Male □   Female □
4 Provide **ONE** of the following:
Your Medicare card number

□□□□ – □□□□□ – □ **OR**

Your DVA file number

Please read this before answering question 5

Question 5 is optional. This information will assist in the planning and provision of appropriate and improved healthcare and services. If you do not answer your My Health Record will show 'not stated'.

5 Are you of Aboriginal or Torres Strait Islander origin?
□ No
□ Yes, Aboriginal
□ Yes, Torres Strait
□ Yes, both Aboriginal and Torres Strait Islander

Please read this before answering question 6

Upon the success of your application, we will provide you with an Identity Verification Code (IVC) to access your My Health Record online.

6 How do you wish to receive your Identity Verification Code?
□ By email to:
@
□ By SMS to: □□□□□□□□□□
□ Through the healthcare provider organisation

7 Please indicate which Medicare information, if any, you consent to being included in your My Health Record:
□ details of **all future** claims made for Medicare benefits when you receive a healthcare service that is covered under the Medicare Benefits Schedule*
  □ **AND** details of any **past** claims for Medicare benefits, if available* (This option is only available if you have selected 'all future claims' above.)
□ details of **all future** claims made for Pharmaceutical benefits when you receive medication that is covered under the Pharmaceutical Benefits Scheme**
  □ **AND** details of any **past** claims for Pharmaceutical benefits, if available** (This option is only available if you have selected 'all future claims' above.)
□ your organ and/or tissue donation decision(s), which are sourced from the Australian Organ Donor Register
□ details of immunisations up until the age of 7, sourced from the Australian Childhood Immunisation Register

Note:
*   includes claims successfully processed on behalf of the Department of Veterans' Affairs (DVA), in accordance with eligibility entitlements provided by DVA.
** includes claims successfully processed on behalf of DVA under the Repatriation Pharmaceutical Benefits Scheme.

8 **Application to register and consent to include information**

I apply for registration and:
- declare that the information in this application is correct and any supporting evidence submitted by me is correct
- consent to records containing my health information being uploaded to the My Health Record system by registered healthcare provider organisations involved in my care, subject to any express advice I give to my healthcare providers not to upload a particular record, a specified class of records, or any records
- declare that I have received and read the 'Essential Information about assisted My Health Record registration' document provided by the assisting healthcare provider organisation

Applicant's signature

Date
  /   /

Note: Giving false or misleading information is a serious offence.

Authorised staff member notes:

My Health Record

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Step 3: Confirm the identity of the individual

Option 1:
Known Customer

Option 2:
100 points of identity

https://myhealthrecord.gov.au/internet/mhr/publishing.nsf/Content/assisted-reg-identification-framework-known-customer-models

Individual presented at least **three** times and Medicare/DVA card sighted

**Need to take reasonable care in identifying the individual**

- Individual's personal details match what is recorded in your CIS
- Individual's name matches that on their Medicare/DVA Card

If not satisfied with the identity of the individual, do not perform the registration

Step 5: Manage the IVC

Individual can choose to receive an Identity Verification Code (IVC), and how to receive it:

- Email
- SMS
- through the organisation
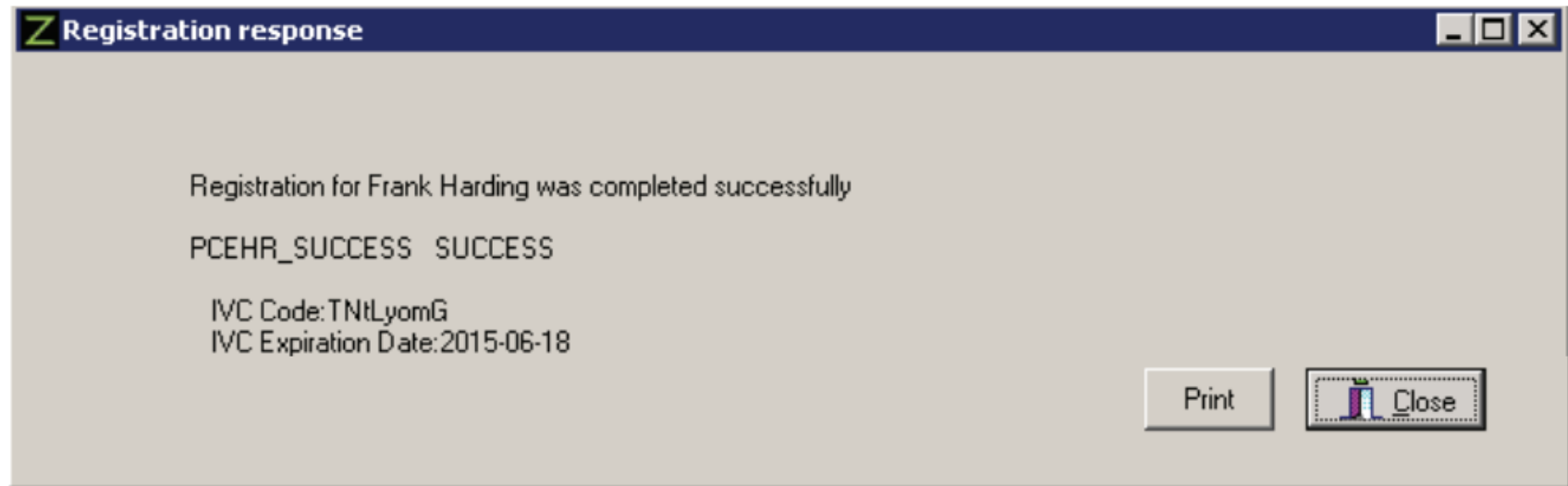
Steps to undertake Assisted Registration

Step 1: Provide individual with the [Essential Information](#)

Step 2: Obtain the consent of the individual

Step 3: Confirm the identity of the individual

Assisted Registration Policy sets out how this is obtained/undertaken

Step 4: Submit the application to the System Operator

Step 5: Manage the IVC (if relevant)

Poll Question:

On a scale of 1-10 (1 being good and 10 meaning bad how does your practice cope with change?

1

2

3

4

5

6

7

8

9

10

What change management achieves

Change introduced

Pre-change performance exceeded

Performance

Time
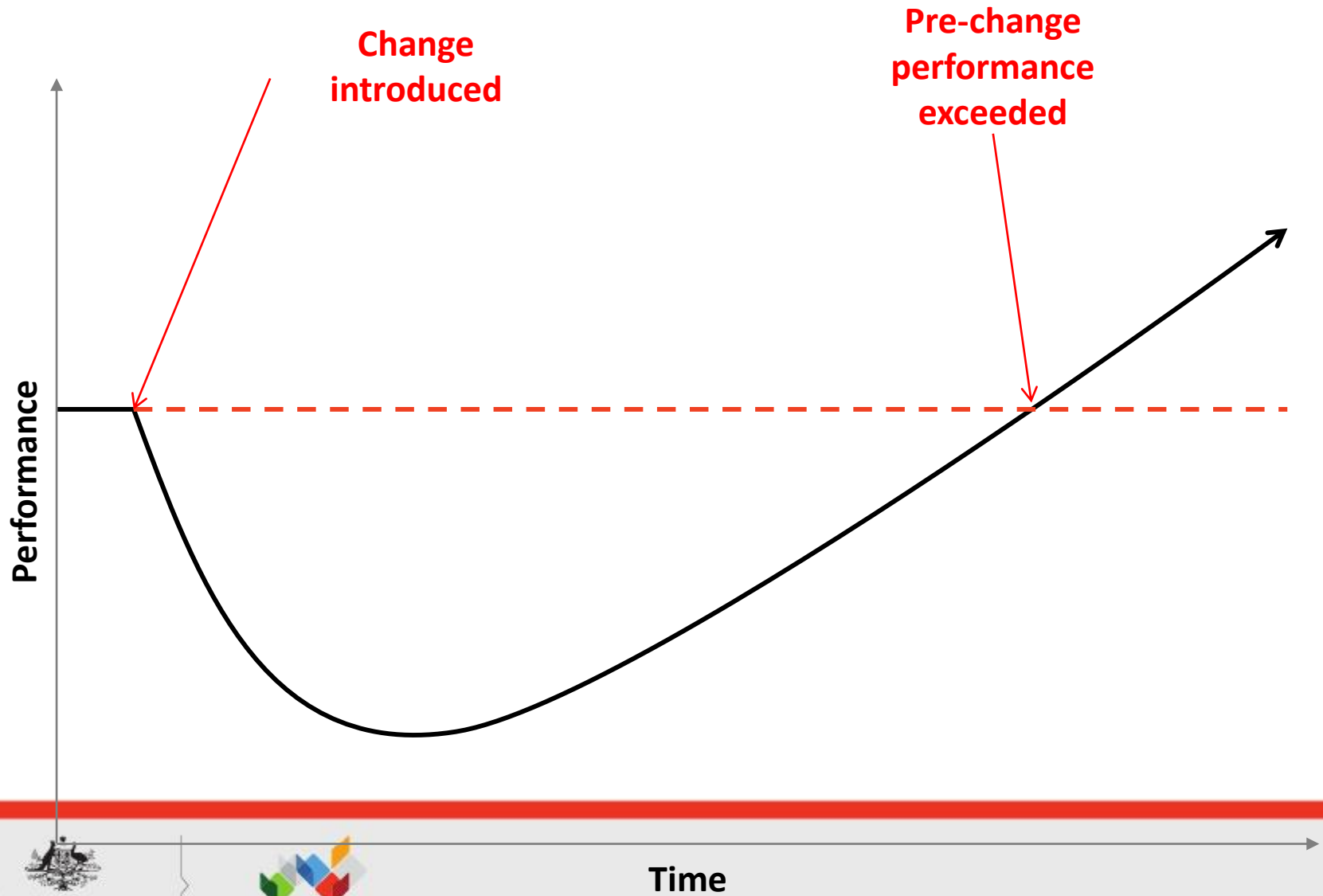
2. Share success stories from other practices
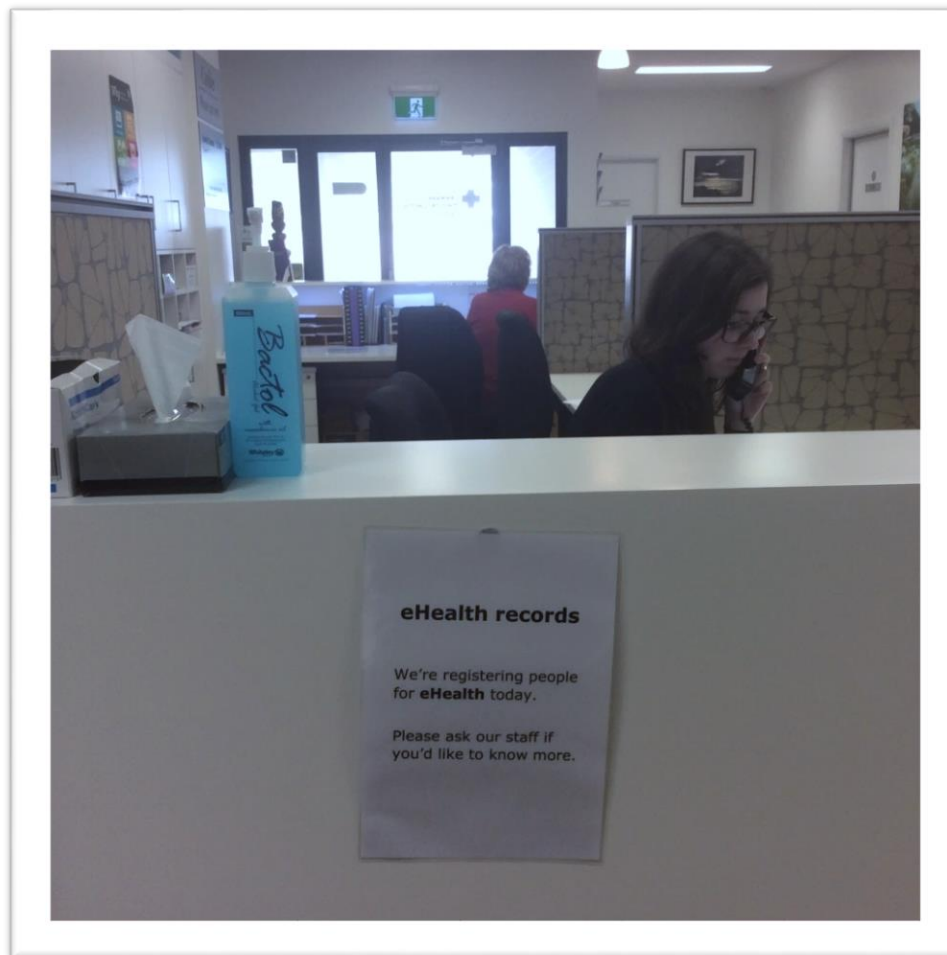
Patient Education in your practice

Patient Education in your practice

Australian Government
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My Health Record

The good
GP never
stops
learning.

RACGP

Oath of Fellowship

RACGP

In
consideration
of staff and
other patients
please turn off
mobile phones
while in waiting
room.
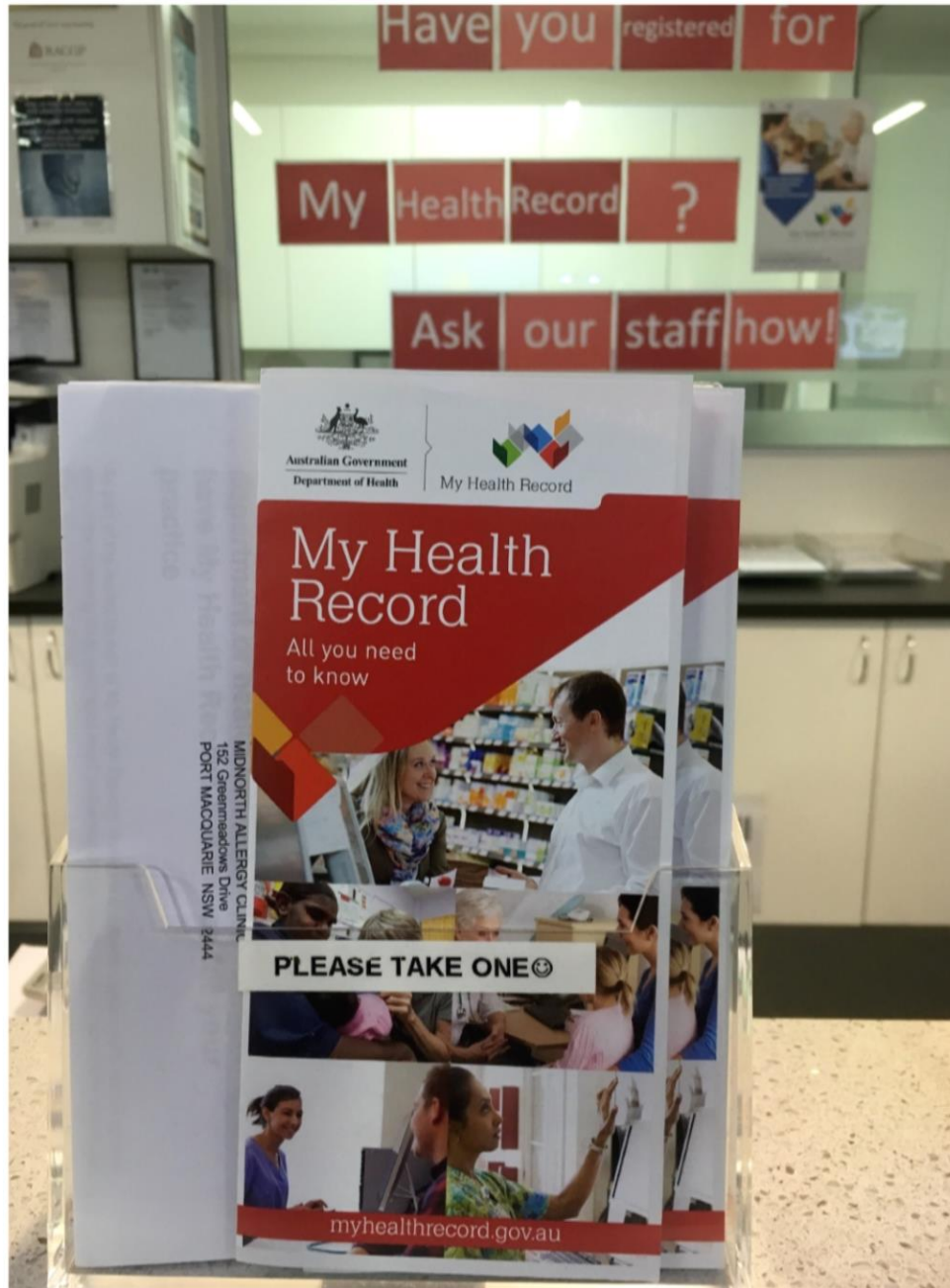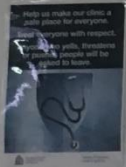
Have you registered for

My Health Record ?

Ask our staff how!

My Health Record
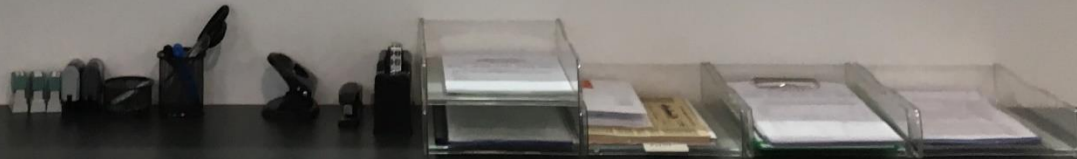
Ask patients on your self check in kiosk

Patient verify their own details

73%

of **self-check-in** patients identified **incorrect** demographic information in their patient record

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My Health Record

Patient Education on your website

Practice Success Story - GP

Health Assessments

1. GP discusses My Health Record with his patients.

   GP "All my patients are elderly, they would all benefit greatly from the hospital being able to see their summary. This should even save me many phone calls at night"

2. If patients want a My Health Record they sign the official form.

3. GP gives forms to Practice Manager.

4. Practice Manager registers patients using integrated ART tool.

   PM "I know it's easy for the Receptionists to register but it literally takes me 5 minutes per day to register half a dozen patients. I prefer to do it myself"

Practice Success Story - Nurse

a) Receptionist greets patient, verifies details/validates IHI.

b) Receptionist checks in MD ART tool if patient already has a My Health Record

c) If not already registered receptionist asks the patient if they would like a My Health Record and obtains consent.

d) Using MD ART tool – receptionist registers patient.

e) Patient goes to see GP who updates medications etc. GP messages ok to upload shared health summary.

f) Patient sees nurse for health assessment.

g) Nurse uploads shared health summary

4. Create a practice-specific dialogue

(include it in your practice policy & orientation process)

[As patients arrive…]

"We're registering people for the My Health Record today. Have a read and if you have any questions we'll be happy to answer." [give brochure and registration form]

[When confirming patient's details, add the question…]

"Do you have a My Health Record?"

[or add the question to consultation checklists…]

"Is the patient registered for My Health Record?"

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Australian Digital Health Agency | My Health Record

Resources available from:

www.digitalhealth.gov.au
www.myhealthrecord.gov.au

Poll Question:

Which patient age group is more

likely to already have a My Health

Record?

Age 20 or less

20 to 39 years

40-64

65 and over

Which age group is more likely to have a My Health Record?

4,029,386 Consumers registered

54% are female and 46% are male

Demographic Breakdown

35%	25%	26%	14%
Aged 20 or less	Aged 20-39	Aged 40-64	Aged 65 or higher

State	ACT	TAS	SA	NT	NSW	VIC	QLD	WA
% of population	20%	17%	15%	16%	16%	12%	22%	12%

Approximately 17% of Australia's population is registered for a My Health Record.

4. Identify privacy & access restrictions for administration staff

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My Health Record

Legislation:

Any person providing care to a patient

The person needs to be authorised by the organisation to access the My Health Record

Technical limitations:

Your CIS may only allow clinical staff to access My Health Record

Who can access a My Health Record?

Q: Do all staff need to access the My Health Record?

The roles of people who can access the My Health Record must be set out in your My Health Record policy

Q: How will you enforce your policy?

Training, education disciplinary/corrective action?

Poll Question:

Does your software have an integrated Assisted Registration Tool?

Yes

No

I think so but I don't know how to use it

I don't know

Access settings in each software

Ensure you have set up user permissions in your software for Assisted Registration

Register patients

Register using ART
tool (on desktop)

Adult - PCEHR Assisted Registration ✕

Individual's Details

Family Name*: `Fourie`

Given Name*: `Gert`

Date of Birth*: `10` / `10` / `1979`

Sex*: ◉ Male ○ Female

Medicare Card No*: `2950 18610 1` / `1` OR

DVA File No*: `[          ]`

Verified IHI No: `[          ]`

Indigenous Status: `Aboriginal and Torres Strait Islander ▾`

Consented Medicare Information to be included in eHealth record

☑ Details of all future claims made for Medicare benefits when an individual receive a healthcare service that is covered under the Medicare Benefits Schedule (MBS)^

  ☑ AND details of any past claims for Medicare benefits, if available^ (This option is only available if an individual have selected 'all future claims' above.)

☑ Details of all future claims made for Pharmaceutical benefits when an individual receive medication that is covered under the Pharmaceutical Benefits Scheme (PBS)^^

  ☑ AND details of any past claims for Pharmaceutical benefits, if available^^ (This option is only available if an individual have selected 'all future claims' above.)

☑ Organ and/or tissue donation decision(s), which are sourced from the Australian Organ Donor Register (AODR)

☑ Details of immunisations up until the age of 7, sourced from the Australian Childhood Immunisation Register (ACIR)

Note:
^ includes claims successfully processed on behalf of the Department of Veterans' Affairs (DVA), in accordance with eligibility entitlements provided by DVA.
^^ includes claims successfully processed on behalf of DVA under the Repatriation Pharmaceutical Benefits Scheme.

Identity Verification Code (IVC) Delivery*

To access the individual's eHealth record online, the individual will need an Identity Verification Code (IVC). No IVC will be issued during registration UNLESS the individual chooses ONE of the following options to select their preferred method for receiving the IVC. The user/operator is responsible for ensuring the accuracy of IVC delivery address submitted via the application.

◉ No IVC

○ Send IVC by email: `[          ]`

○ Send IVC by SMS: `[          ]`

○ Send IVC through this healthcare provider organisation

Application to register and consent to include information

The individual apply for registration and:
- Declare that the information in this application is correct and any supporting evidence submitted is correct
- Consent to records containing their health information being uploaded to the eHealth record system and registered healthcare provider organisations involved in the individual's care, subject to any express advice the individual gives to their healthcare providers not to upload a particular record, a specified class of records, or any records
- Declare that individual have received and read the 'Essential Information about assisted Personally Controlled Electronic Health Record (eHealth record) registration' document provided by the assisting healthcare provider organisation

Identity Verification Method*:
`Attending third or more consultation and Medicare/DVA card ▾`

☑ Application Form Signed | `Scan/Import Signed Application Form`

Note: * - refers to mandatory information   `Submit`   `Cancel`

MedicalDirector
CLINICAL

Register patients via Appointment Book

Genie Solutions
Simply Delivers

Register a patient

5. Discuss policies, consent and standards appropriate to My Health Record

Healthcare providers must still meet existing legal and professional obligations when using the My Health Record

Privacy Act 1988

Australian Privacy Principles

Computer and information security standards

For general practices and other office-based practices

Second edition

Duty of Confidentiality

Expected standards of use of the My Health Record will develop organically over time.

In absence of these standards, the AMA Guide is a helpful tool that demonstrates the medical profession's expectation of use of the My Health Record.

https://ama.com.au/article/ama-guide-using-pcehr

AMA

AMA Guide to Medical Practitioners

on the use of the

Personally Controlled Electronic Health Record System

Australian Medical Association Limited ABN 37 008 426 793

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My Health Record

Consent and the My Health Record

Do I need consent to view a patient's My Health Record?

No, a provider is authorised to view a record when providing healthcare to the patient.

Do I need consent to upload a document to a patient's My Health Record?

A provider is authorised to upload clinical documents without gaining consent of a patient each and every time
*** exception – Category 5 conditions; HIV/AIDS

Need agreement with patient to upload a Shared Health Summary, this can be verbal

Poll Question:

Is data quality improving in your practice?

Yes

No

Slightly

Not sure

RACGP Standards

A. Our practice can demonstrate that at least 90% of our active patient health records contain a record of known allergies.

B. Our practice can demonstrate that **at least 75%** of our active patient health records contain a **current health summary.**

C. Our practice has documented standardised clinical terminology (such as **coding**)..

http://www.racgp.org.au/your-practice/standards/standards4thedition/practice-services/1-7/health-summaries/

Data Quality checklist

1 **Demographics** – are the contact details up-to-date?
- Double-click on the patient's telephone number to check & update details

2 **Medication** List – is the Current Meds list accurate?
- Right click to delete/cease medications no longer relevant (they can then be found in the Old/Past Scripts thereafter)
- If none, tick No medications

3 **Past History** List – does it contain only significant conditions that a hospital or specialist would need to know?
- Right click to edit, delete or add new
- If none, tick No significant past history (PMH) box

4 **Allergies** – have you also recorded adverse reactions?
- Double-click in allergies box and Add, Edit, Delete
- If none, tick No Known Allergies/Adverse Reactions/Nil Known

5 **Immunisations** – have immunisations been recorded?

Digital Health Incentive Payment

1. Integrating Healthcare Identifiers

2. Data Records and Clinical Coding

3. ePrescribing

4. Secure Messaging

**5. Upload Shared Health Summaries
   to My Health Record for 0.5% of SWPE**

ePIP

**New: -   Upload requirement per quarter
            starting 1 May 2016**

Prepare your team:

1. Complete the free eLearning Modules
   https://myhealthrecord.e3learning.com.au/

2. Download the 'guides' for your software
   https://www.digitalhealth.gov.au/using-the-my-health-record-system/digital-health-training-resources/guides

3. Watch the software demonstration for your software
   https://www.digitalhealth.gov.au/using-the-my-health-record-system/digital-health-training-resources/software-demonstrations

4. Practise in the 'On-Demand' Training Environment
   https://www.digitalhealth.gov.au/using-the-my-health-record-system/digital-health-training-resources/on-demand

A team approach

1. Practice Managers write the policy & train staff

2. Receptionists register patients

3. Registrars & nurses may be able to help clean up data

4. Nurses, Registrars, GPs & Aboriginal Health Practitioners can upload

What we need now:

✓ Next time the **hospital** rings and asks you to fax over a health summary say "Have you checked the patient's My Health Record?"

✓ Next time a **doctor** asks you to ring the hospital and get the patient's discharge summary faxed over say "Have you checked the patient's My Health Record?"

✓ Our patients with a My Health Record (Critical mass)

✓ View & upload process becoming embedded into routine clinical and administrative workflow

Contact the Agency

Help Centre: **1300 901 001**

8am-6pm Monday to Friday

Email: **help@digitalhealth.gov.au**

Website: **www.digitalhealth.gov.au**

Twitter: **https://twitter.com/AuDigitalHealth**

Thank you for attending today's webinar