



Colorectal Cancer Screening Programme

Primary Care Doctor

How to assign clinical assistant?

(ver. Feb 2021)

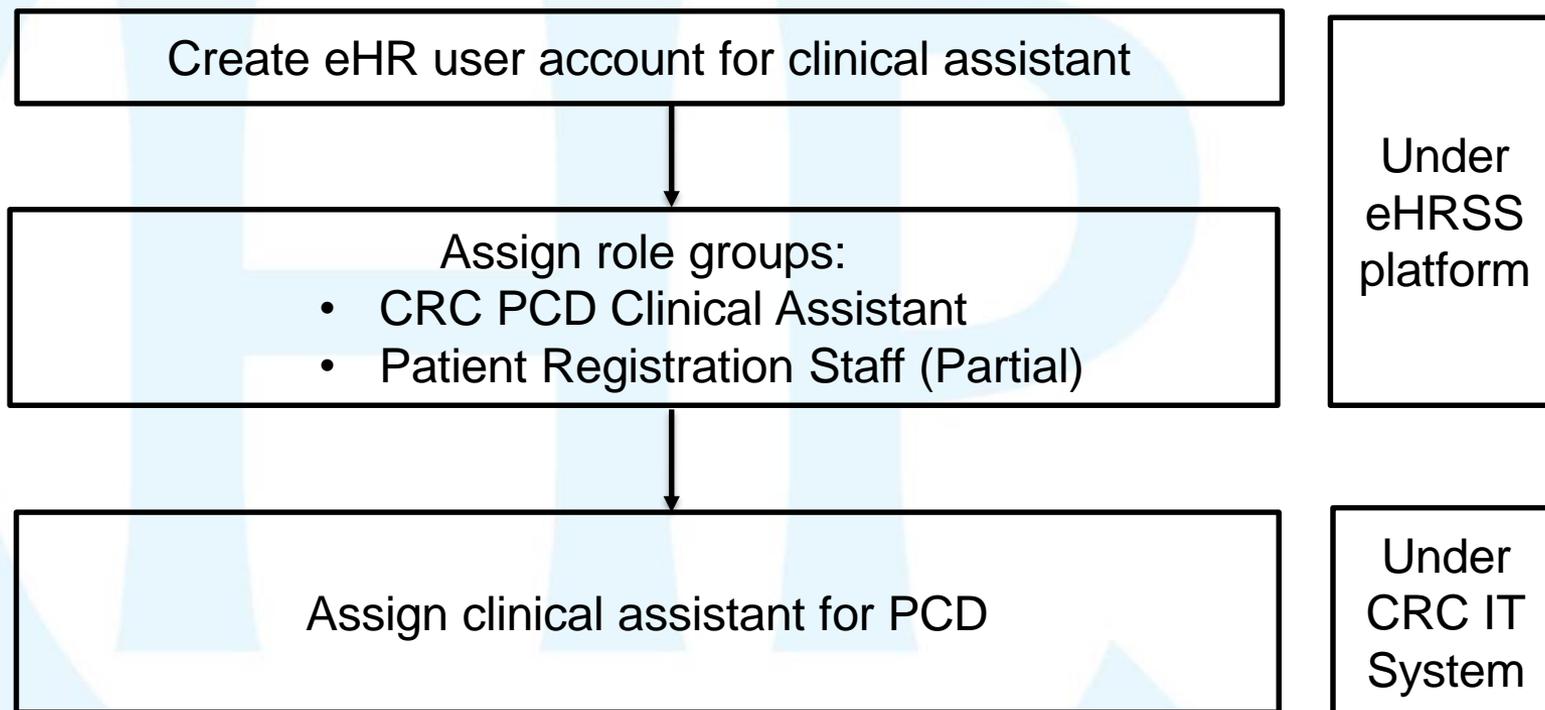
Assigning clinical assistant

- PCD may wish to assign clinical assistants to undertake certain tasks
 - Processing participant enrolment
 - Educating participant about the use of FIT, specimen collection and return of specimen to Specimen Collection Point
 - Viewing FIT results under the “To-do List” of assigned PCD
 - Contacting participant regarding FIT result and follow-up action
- PCD are strongly encouraged to assign clinical assistants well in advance in order to ensure the smooth running of screening service at their clinic



Summary diagram of procedures

(without existing eHR user account for clinical assistant)



Summary

eHRSS-related steps

User Administrator (UA) of the HCP needs to make the following arrangements:

- Step 1 **(slide 5)**
 - Obtain the personal information, internet email address, mobile phone number, etc. of clinical assistant
- Step 2
 - Create eHR user account for clinical assistant **(slide 7 to 12)**
 - (or if clinical assistant already has eHR user account, proceed to Step 3 to assign role group for clinical assistant)
- Step 3 **(slide 13 to 18)**
 - Assign role group for the clinical assistant, ie "CRC PCD Clinical Assistant" and "Patient Registration Staff (Partial)"

CRC IT System-related steps (slide 19 to 24)

- Once all 3 steps have been completed under eHRSS, PCD can assign clinical assistant through CRC IT System



eHRSS-related steps

Step 1

- UA should obtain the personal information, internet email address, mobile phone number, etc. of clinical assistant.
- The mobile phone number used by clinical assistant will be used to receive the eHRSS notification (if desired communication means is “SMS”) and also the SMS of One-Time Password (OTP) for the login of eHRSS by clinical assistant.

(For enquiry, call at 3467 6230)



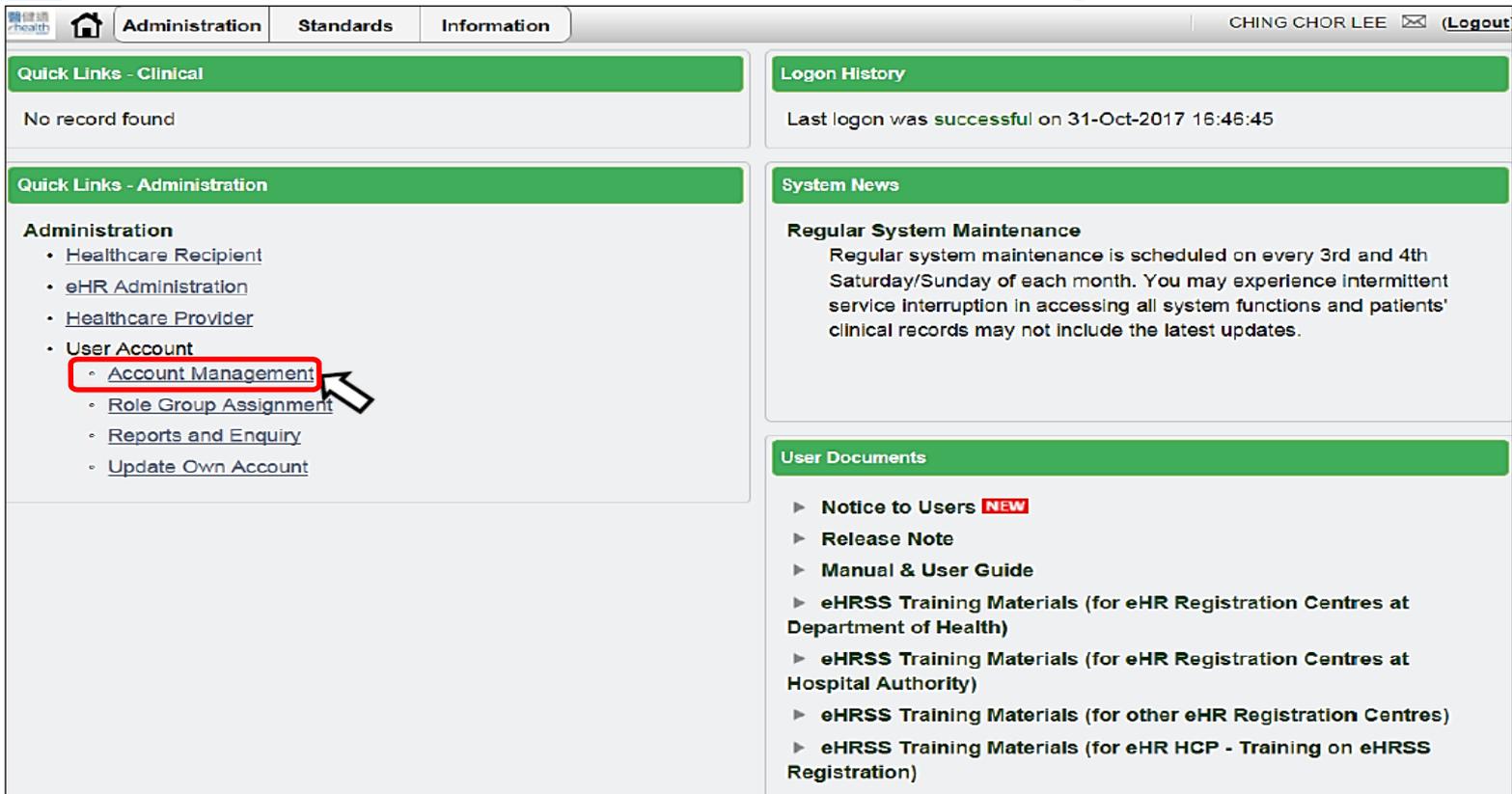
eHRSS-related steps

Step 2

- Follow the procedures on **slides 7 to 12** to create eHR user account for clinical assistant if UA does not have any existing eHR user account for clinical assistant and UA is **assigning clinical assistant for the first time**.
- Follow the procedures on **slides 13 to 18** to assign role groups for clinical assistant if the **clinical assistant already has eHR user account**.



eHRSS-related steps: create eHR User account (1)

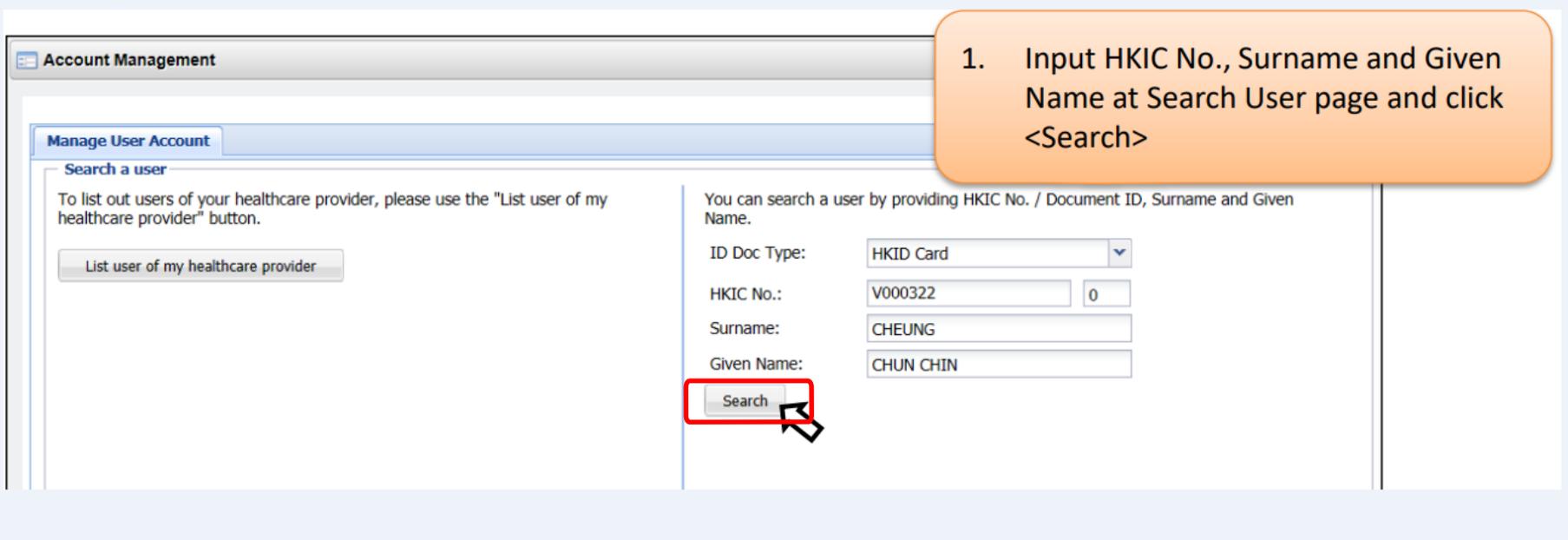


The screenshot shows the eHRSS user interface. At the top, there are navigation tabs for 'Administration', 'Standards', and 'Information'. The user is logged in as 'CHING CHOR LEE' with a 'Logout' button. The main content area is divided into several sections:

- Quick Links - Clinical:** No record found.
- Quick Links - Administration:** A list of links under the 'Administration' heading:
 - Healthcare Recipient
 - eHR Administration
 - Healthcare Provider
 - User Account
 - Account Management** (highlighted with a red box and a mouse cursor arrow)
 - Role Group Assignment
 - Reports and Enquiry
 - Update Own Account
- Login History:** Last logon was successful on 31-Oct-2017 16:46:45.
- System News:** Regular System Maintenance. Regular system maintenance is scheduled on every 3rd and 4th Saturday/Sunday of each month. You may experience intermittent service interruption in accessing all system functions and patients' clinical records may not include the latest updates.
- User Documents:** A list of documents:
 - Notice to Users **NEW**
 - Release Note
 - Manual & User Guide
 - eHRSS Training Materials (for eHR Registration Centres at Department of Health)
 - eHRSS Training Materials (for eHR Registration Centres at Hospital Authority)
 - eHRSS Training Materials (for other eHR Registration Centres)
 - eHRSS Training Materials (for eHR HCP - Training on eHRSS Registration)

- Log in eHRSS
- At the landing page, click “Account Management”

eHRSS-related steps: create eHR User account (2)



The screenshot shows the 'Account Management' interface. On the left, there is a 'Manage User Account' section with a 'Search a user' sub-section. It contains a button labeled 'List user of my healthcare provider' and a text instruction: 'To list out users of your healthcare provider, please use the "List user of my healthcare provider" button.' On the right, there is a search form with the following fields: 'ID Doc Type' (dropdown menu set to 'HKID Card'), 'HKIC No.' (text input 'V000322' and a small '0' in a box), 'Surname' (text input 'CHEUNG'), and 'Given Name' (text input 'CHUN CHIN'). A 'Search' button is highlighted with a red box and a mouse cursor. An orange callout box on the right contains the instruction: '1. Input HKIC No., Surname and Given Name at Search User page and click <Search>'.

- Check whether eHR user account already existed for the clinical assistant



eHRSS-related steps: create eHR User account (3)

Account Management

Manage User Account

Create New User Account

Healthcare Provider: RG PRIVATE HOSPITAL

Personal Information

ID Doc Type*: HKID Card

HKIC No.*: V000322

Surname*: CHEUNG

Given Name: CHUN CHIN

Chinese Name: 張進雲

Contact Phone No.: 24646464

Post Title: MD

Title (English): Doctor

Title (Chinese): 醫生

Fax No.: 23646494

Contact Person:

Contact / Notification Information

Communication Means*: Email

Mobile Phone No.*: 98186426

Internet Email Address*: chunchin@rgprivatehospital.com

Re-enter Internet Email Address*: chunchin@rgprivatehospital.com

Administrative Institution

Healthcare Service Location*: RG PRIVATE HOSPITAL - KLN BAY - 5531407205

Name	Contact No.	Address
RG PRIVATE HOSPITAL - KLN BAY		Unit A, 18/F, CHEVALIER COMMERCIAL CENTRE, 8 WANG...

2. i) Input Personal Information
ii) Input Contact/Notification Information
iii) Select main working location at Administration Institution

These fields were pre-filled when UA clicked "Search" in step 1 (see slide 8)

- If eHR user account has not been created before, UA should input the relevant information as stated in the above diagram
- "Mobile Phone no." is a mandatory field and is also for receiving SMS for One-Time password by default



eHRSS-related steps: create eHR User account (4)

3. i) Input User Name
ii) Select Second Authentication Factor

Login Information

User Name*: Second Authentication Factor*:

User Name must be 6 to 20 alphanumeric characters

One-Time Password / Mode A is required for:
1. Healthcare Professional to view eHR record
2. User Admin to manage user account

- Select One-Time Password as “Second Authentication Factor”

eHRSS-related steps: create eHR account (5)

Prime Relationship Information

Healthcare Staff Type*: Relationship End Date:

Professional Registration Information

Professional Category*: Professional Registration Number*:

- Select Healthcare Staff Type
- Select relationship start and end date
 - Note: if the clinical assistant to be assigned is a Healthcare Professional eg. Registered Nurse, the system will prompt for “Professional Category” and “Professional Registration Number”
- Click “Create”



eHRSS-related steps: create eHR User account (6)

Notification

 User Account is created successfully
eHR UID: 9764252922
User Name: cheungch

User's information will be sent to respective medical professional boards/councils for verification. User's current account status is set to 'Pending'.

Upon successful verification, you and the user will be notified of the result.

The process is almost completed, still one step to go...
Please assign access right to the user at Role Group Assignment

For Healthcare Professional only

- Pop-up notification will be displayed once eHR user account is created
- The clinical assistant and User Administrator will receive notification via desired communication means eg. e-mail
- Click “Assign Access Right” to assign role group (see “Step 3” for details)



eHRSS-related steps: assign role group (1)

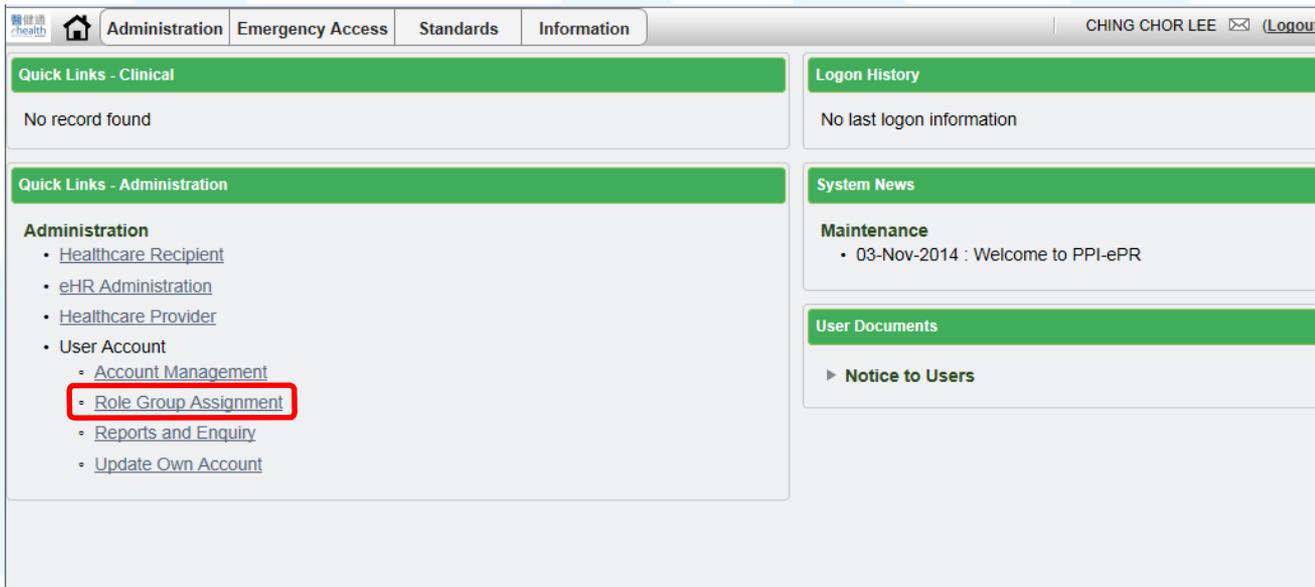
Step 3

- After eHR user account has been created, User Administrator should then **assign role group** for the clinical assistant
- **2 role groups** should be assigned
 - **CRC PCD Clinical Assistant**
 - **Patient Registration Staff (Partial)**



eHRSS-related steps: assign role group (2)

- If clinical assistant already has existing eHR user account but role group “CRC PCD Clinical Assistant” and “Patient Registration Staff (Partial)” were not assigned at the time of account creation, UA can assign role groups for the Clinical Assistant at “Role Group Assignment”.



The screenshot shows the eHRSS landing page with the following structure:

- Navigation tabs: Administration, Emergency Access, Standards, Information
- User: CHING CHOR LEE (Logout)
- Quick Links - Clinical: No record found
- Quick Links - Administration:
 - Administration
 - Healthcare Recipient
 - eHR Administration
 - Healthcare Provider
 - User Account
 - Account Management
 - Role Group Assignment** (highlighted with a red box)
 - Reports and Enquiry
 - Update Own Account
- Logon History: No last logon information
- System News:
 - Maintenance
 - 03-Nov-2014 : Welcome to PPI-ePR
- User Documents:
 - Notice to Users

- At the eHRSS landing page, click “Role Group Assignment”

eHRSS-related steps: assign role group (3)

Role Group Assignment

Assign Role Group to HCS

Search Criteria

Search By*: User Name

Search Value: leesheung

Find

Search Result

eHR UID	User Name	Edit User
7356657170	leesheung	Edit User

- UA can search the clinical assistant by the selected search criteria eg. by using the User Name
- Click “Find”
- Search result will be displayed
- Click “Edit User”



eHRSS-related steps: assign role group (4)

Role Group Assignment

[Assign Role Group to HCS](#) [Assign/View Role Group to HCP](#)

User Information

eHR UID: 7355657170
User Name: leesheung
Account Status: Active

Relationship Information

HCP	Relationship Type
RG - 3598496873	Prime

HCP Selection

The HCP selected: 3598496873
HCP:

- Select desired HCP



eHRSS-related steps: assign role group (5)

Role Group Assignment

Assign Role Group to HCS

Assign/View Role Group to HCP

User Information

eHR UID: 7355657170
User Name: leesheung
Account Status: Active

Relationship Information

HCP	Relationship Type
RG - 3598496873	Prime

HCP Selection

The HCP selected: 3598496873
HCP:

Assign Role Group Information

Role Group Start Date*:
Role Group End Date:

Role Group Code	Role Group Name	<input type="checkbox"/>
<input type="checkbox"/> CRC_PCD_CLI_ASSISTANT	CRC PCD Clinical Assistant	<input type="checkbox"/>
<input type="checkbox"/> PATIENT_REG_PARTIAL	Patient Registration Staff (Partial)	<input type="checkbox"/>

- A list of available role groups will be displayed (for simplicity, only the two required role groups have been displayed in this document)

Expand All Collapse All

Save Back



eHRSS-related steps: assign role group (6)

Assign Role Group Information

Role Group Start Date*: 25-Jan-2016

Role Group End Date: dd-MMM-yyyy

Role Group Code	Role Group Name	<input type="checkbox"/>
CRC_PCD_CLI_ASSISTANT	CRC PCD Clinical Assistant	<input checked="" type="checkbox"/>
PATIENT_REG_PARTIAL	Patient Registration Staff (Partial)	<input checked="" type="checkbox"/>

Expand All Collapse All

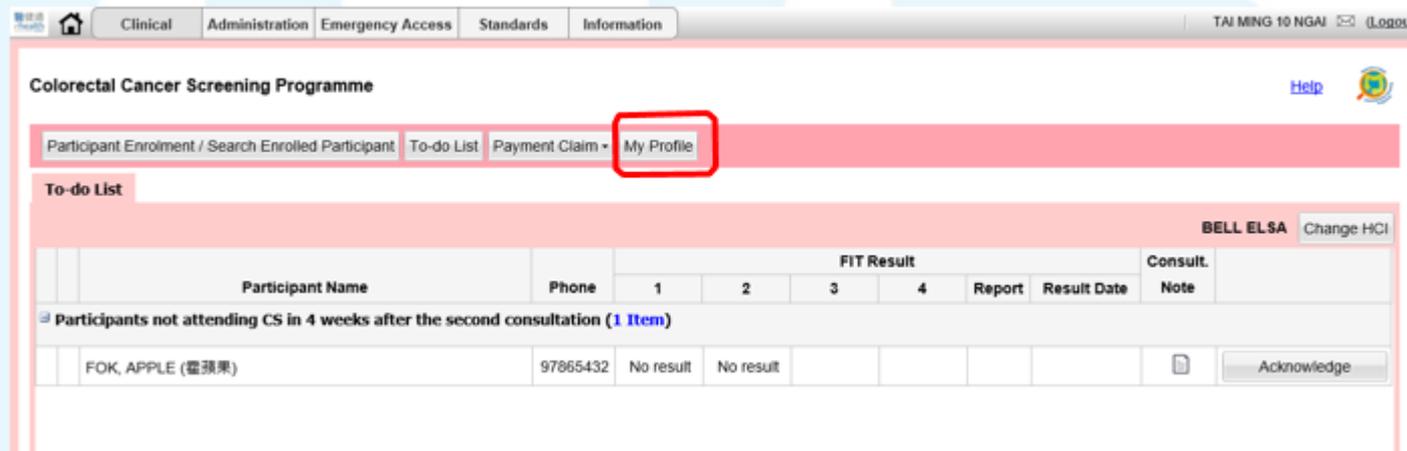
Save Back

- Check the box of **CRC PCD Clinical Assistant** and **Patient Registration Staff (Partial)**, in order to assign those role groups to the clinical assistant
- Click “Save”
- “Assign Role Group Result” will then be displayed



CRC IT System-related steps: assign clinical assistant for PCD (1)

- Once all 3 steps have been completed under eHRSS, PCD can now assign clinical assistant through CRC IT System

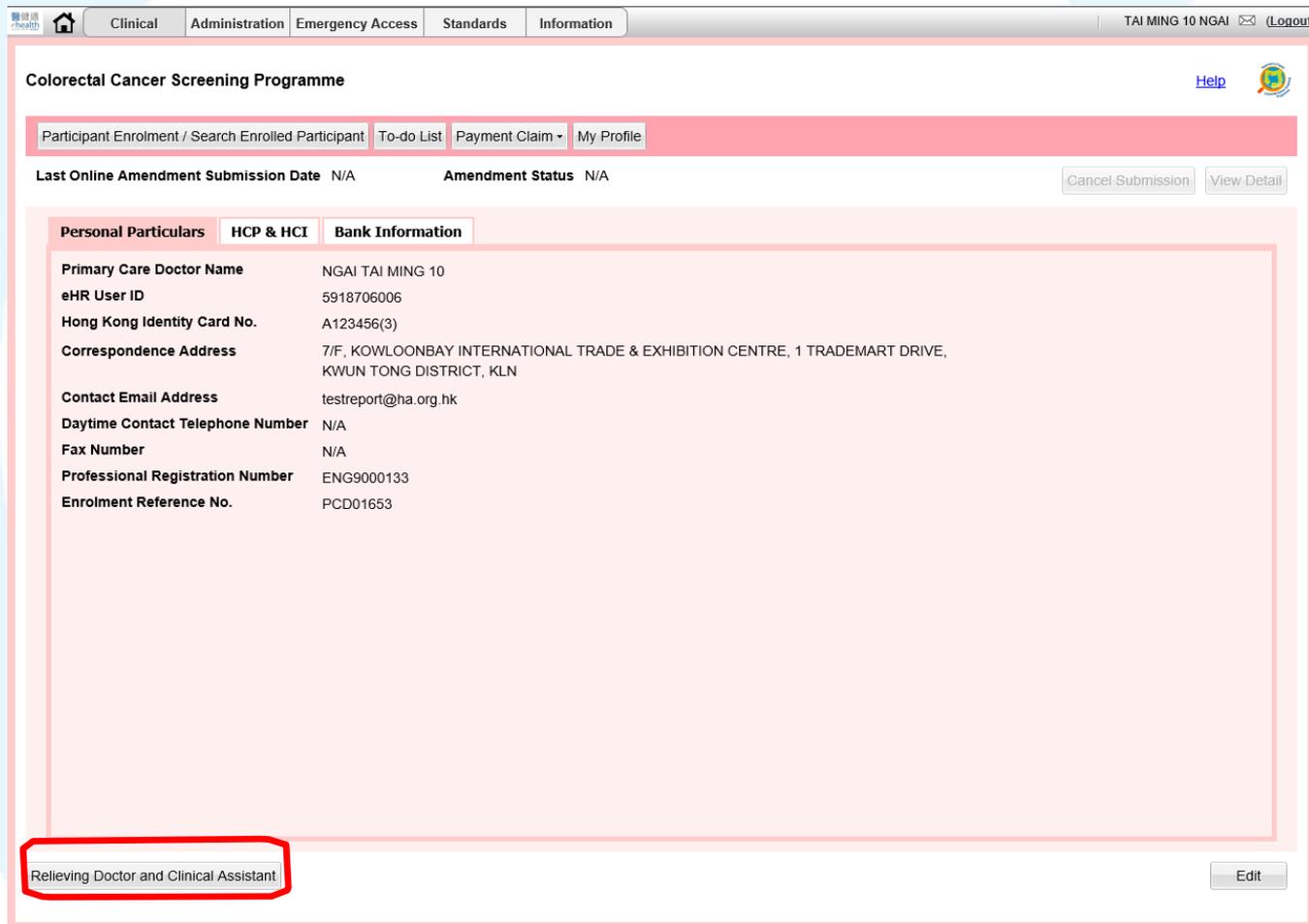


The screenshot shows the 'Colorectal Cancer Screening Programme' interface. The 'My Profile' tab is highlighted with a red box. Below the tabs, there is a 'To-do List' section with a table of participants. The table has columns for Participant Name, Phone, FIT Result (1, 2, 3, 4), Report, Result Date, Consult. Note, and an Acknowledge button. A red box highlights the 'My Profile' tab in the navigation bar.

Participant Name	Phone	FIT Result				Report	Result Date	Consult. Note	
		1	2	3	4				
Participants not attending CS in 4 weeks after the second consultation (1 Item)									
FOK, APPLE (霍頌果)	97865432	No result	No result						Acknowledge

- Log in CRC IT System
- Click “My Profile” tab

CRC IT System-related steps: assign clinical assistant for PCD (2)

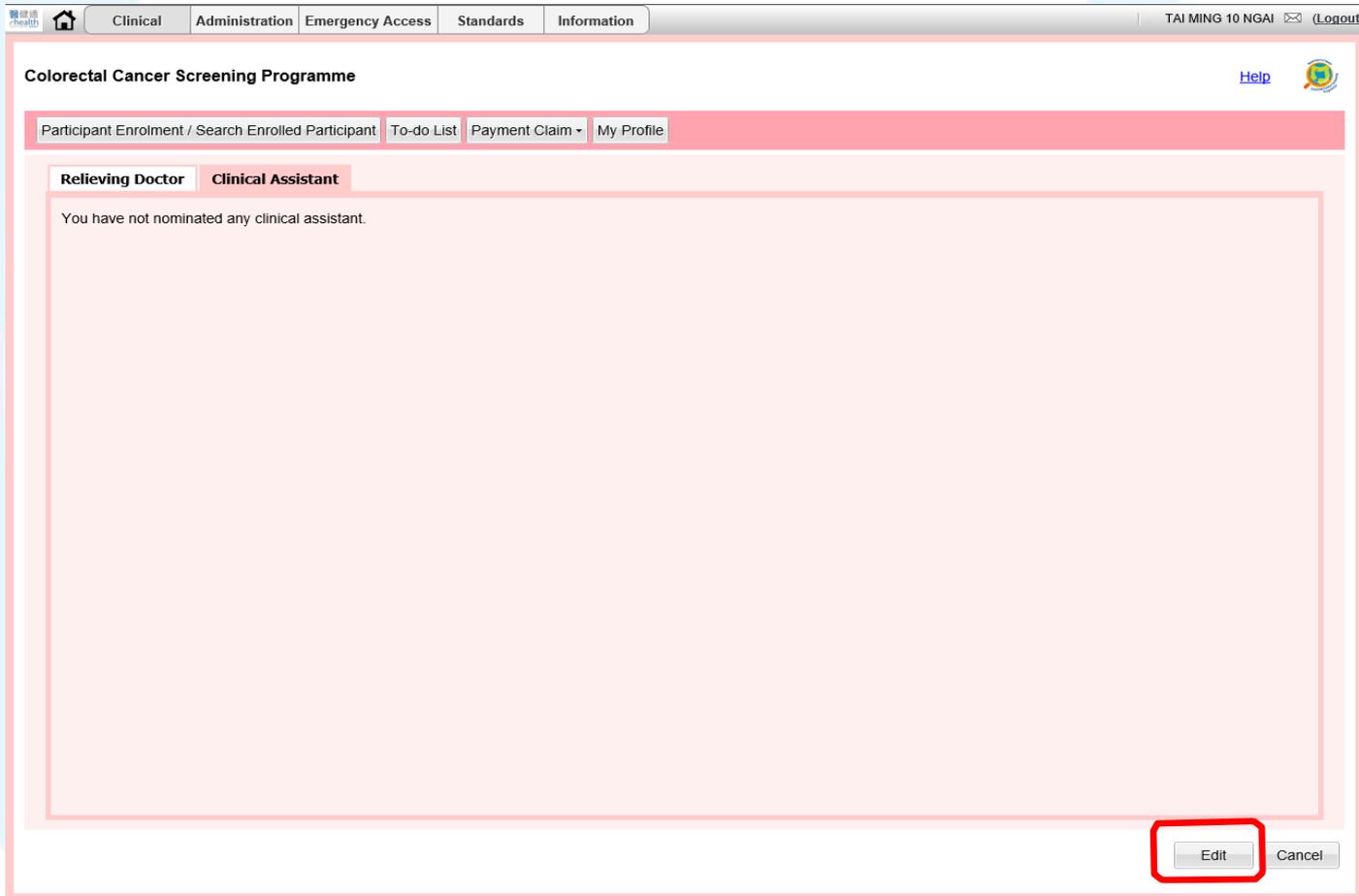


The screenshot shows the 'Colorectal Cancer Screening Programme' interface. The user is logged in as 'TAI MING 10 NGAI'. The main content area displays the 'My Profile' tab, which includes a table of personal details for the Primary Care Doctor (NGAI TAI MING 10). At the bottom left of the profile area, the button 'Relieving Doctor and Clinical Assistant' is highlighted with a red rectangular box. Other buttons like 'Cancel Submission' and 'View Detail' are visible at the top right of the profile section.

Personal Particulars	HCP & HCI	Bank Information
Primary Care Doctor Name	NGAI TAI MING 10	
eHR User ID	5918706006	
Hong Kong Identity Card No.	A123456(3)	
Correspondence Address	7/F, KOWLOONBAY INTERNATIONAL TRADE & EXHIBITION CENTRE, 1 TRADEMART DRIVE, KWUN TONG DISTRICT, KLN	
Contact Email Address	testreport@ha.org.hk	
Daytime Contact Telephone Number	N/A	
Fax Number	N/A	
Professional Registration Number	ENG9000133	
Enrolment Reference No.	PCD01653	

- Click “Relieving Doctor and Clinical Assistant” button

CRC IT System-related steps: assign clinical assistant for PCD (3)



Colorectal Cancer Screening Programme

Participant Enrolment / Search Enrolled Participant To-do List Payment Claim My Profile

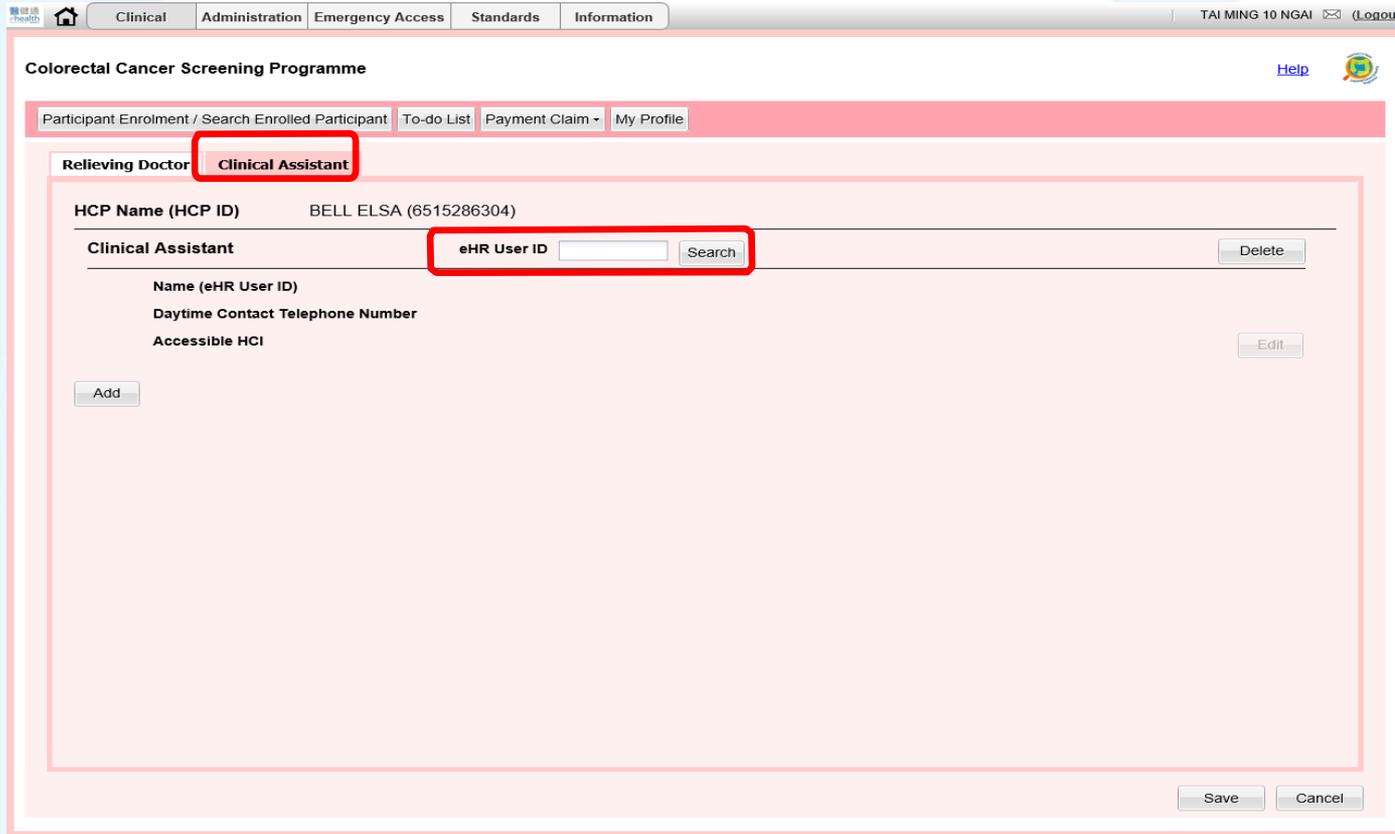
Relieving Doctor Clinical Assistant

You have not nominated any clinical assistant.

Edit Cancel

- Click “Edit” button

CRC IT System-related steps: assign clinical assistant for PCD (4)



The screenshot shows the 'Colorectal Cancer Screening Programme' web interface. The 'Clinical Assistant' tab is selected and highlighted with a red box. Below the tab, the 'HCP Name (HCP ID)' is 'BELL ELSA (6515286304)'. The 'Clinical Assistant' section contains a form with an 'eHR User ID' input field and a 'Search' button, both highlighted with red boxes. Other fields include 'Name (eHR User ID)', 'Daytime Contact Telephone Number', and 'Accessible HCI'. There are 'Delete', 'Edit', and 'Add' buttons. The top navigation bar includes 'Clinical', 'Administration', 'Emergency Access', 'Standards', and 'Information'. The user is logged in as 'TAI MING 10 NGAI'.

- Click “Clinical Assistant” tab
- Type in eHR User ID of the clinical assistant
- Click “Search” button

CRC IT System-related steps: assign clinical assistant for PCD (5)

Colorectal Cancer Screening Programme

Participant Enrolment / Search Enrolled Participant / To-do List / Payment Claim - / My Profile

Relieving Doctor / **Clinical Assistant**

HCP Name (HCP ID) BELL ELSA (6515286304)

Clinical Assistant eHR User ID Search

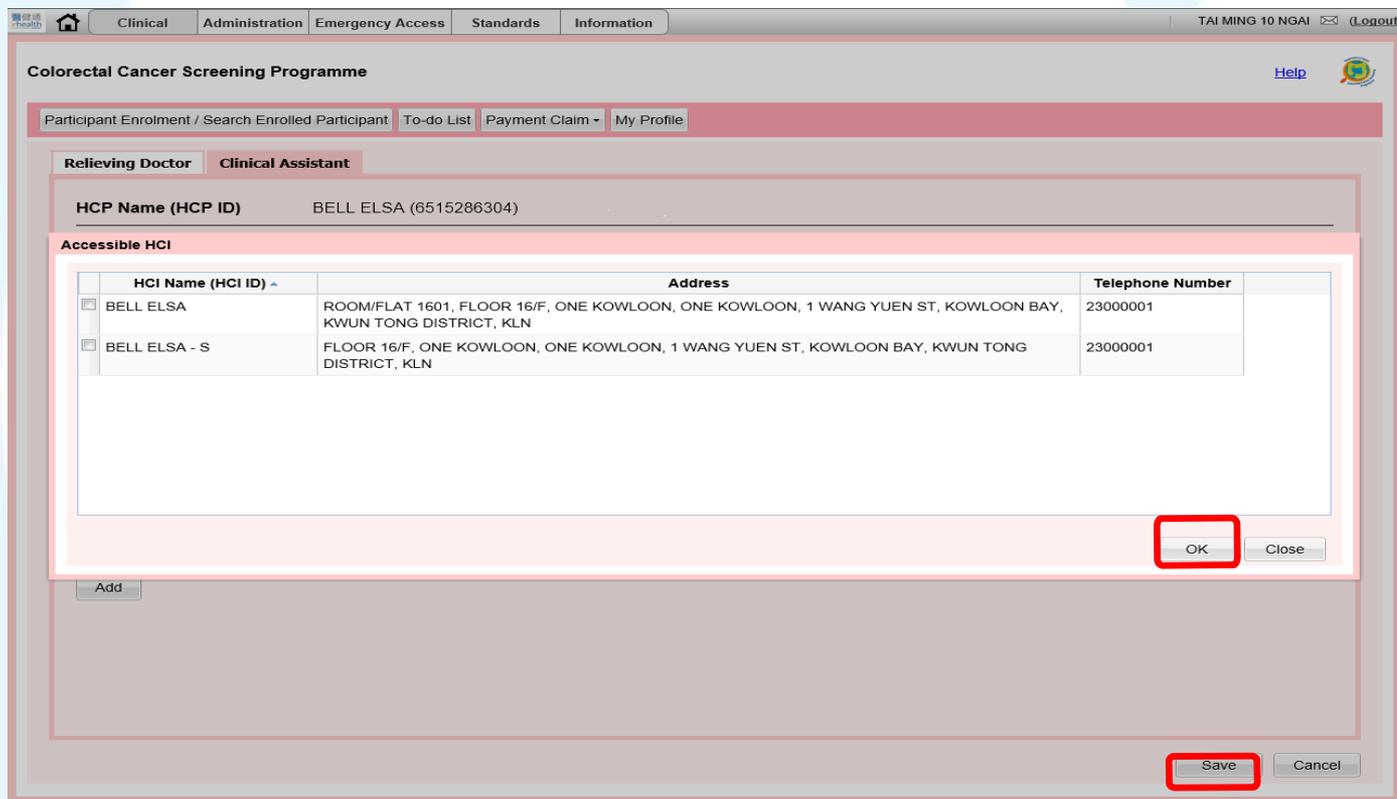
Name (eHR User ID) SO, TAI MING 10 (7560685487)

Daytime Contact Telephone Number N/A

Accessible HCI

- Click “Add” button when details of the desired clinical assistant have been found
- Click “Edit” button to select HCI where the clinical assistant can have access to

CRC IT System-related steps: assign clinical assistant for PCD (6)



Colorectal Cancer Screening Programme

Participant Enrolment / Search Enrolled Participant To-do List Payment Claim - My Profile

Relieving Doctor Clinical Assistant

HCP Name (HCP ID) BELL ELSA (6515286304)

Accessible HCI

HCI Name (HCI ID)	Address	Telephone Number
<input type="checkbox"/> BELL ELSA	ROOM/FLAT 1601, FLOOR 16/F, ONE KOWLOON, ONE KOWLOON, 1 WANG YUEN ST, KOWLOON BAY, KWUN TONG DISTRICT, KLN	23000001
<input type="checkbox"/> BELL ELSA - S	FLOOR 16/F, ONE KOWLOON, ONE KOWLOON, 1 WANG YUEN ST, KOWLOON BAY, KWUN TONG DISTRICT, KLN	23000001

OK Close

Add

Save Cancel

- Click appropriate box of HCI Name
- Click “OK” button
- Click “Save” button